



AFRICAN UNION
**INTERAFRICAN BUREAU
FOR ANIMAL RESOURCES**

REINFORCING VETERINARY GOVERNANCE IN AFRICA

VET-GOV

**LIVESTOCK RELATED CAPACITY AND
INSTITUTIONAL ASSESSMENT OF
REGIONAL FARMER ORGANISATIONS –
SOUTHERN AFRICA**



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LIST OF ACRONYMS

ACT	Agricultural Council of Tanzania
AFASA	African Farmers' Association of South Africa
AFDI	Agriculteurs Français et Développement International
Agbiz	Agricultural Business Chamber (South Africa)
AGRA	Alliance for Green Revolution in Africa
AGRITEX	Agricultural Technical & Extension Services (Zimbabwe)
AMA	Mozambique Aviculture Association
ARC	Agriculture Research Council (South Africa)
ASF	African swine fever
ASUF	Agri-Sector Unity Forum (South Africa)
AU-IBAR	African Union Interafrican Bureau for Animal Resources
AU-NPCA	African Union (AU) and New Partnership for Africa's Development (NEPAD) Planning and Coordinating Agency
BAU	Botswana Agricultural Union
BFAP	Bureau for Food and Agricultural Policy
BMC	Botswana Meat Commission
CAADP	Comprehensive Africa Agriculture Development Programme
CAADP	Comprehensive Africa Agriculture Development Programme
CBPP	Contagious bovine pleuro-pneumonia
CCARDESA	Center for the Coordination of Agricultural Research and Development in Southern Africa
CEDA	Citizen Entrepreneurial Development Agency (Botswana)
CFU	Commercial Farmers' Union (Zimbabwe)
CGIAR	Consultative Group on International Agricultural Research
COMESA	Common Market for Eastern and Southern Africa
CPM	Coalition Paysanne de Madagascar
CREMPA	Central Region Milk Processors Association of Malawi
CTA	Technical Centre for Agricultural & Rural Cooperation
CVSZ	Council of Veterinary Surgeons of Zimbabwe
DAFF	Department of Agriculture, Forestry & Fisheries (South Africa)
DAP	Department of Animal Production (DAP, Botswana)
DAZ	Dairy Association of Zambia
DESC	Department of Extension Service Co-ordination (DESC, Botswana)
DVS	Department of Veterinary Services (DVS, Botswana)
ESADA	Eastern and Southern Africa Dairy Association
ESAFF	East and Southern African Farmers' Forum
FANRPAN	Food, Agriculture and Natural Resources Policy Analysis Network
FAO	Food and Agriculture organisation of the United Nations
FAP	Financial Assistance Policy (Botswana)
FARA	Forum for Agricultural Research in Africa
FEKRITAMA	Madagascar-Fivondronamben'ny Tantsaha Malagasy
FENAM	
FMD	Foot and mouth disease
FUM	Farmers' Union of Malawi
IFAD	International Fund for Agricultural Development
IFPRI	International Food Policy Research Institute
ILRI	International Livestock Association
IWMI	International Water Management Institute
LENAFU	Lesotho National Farmers' Union
LIT	Livestock Identification Trust
LMAC	Livestock and Meat Advisory Council (Zimbabwe)
LNWMGA	Lesotho National Wool & Mohair Growers' Association
LPO	Livestock Producers' Organisation (Namibia)

MDB	Malagasy Dairy Board
MMPA	Malawi Milk Producers' Association
MPO	Milk Producers' Organisation (MPO)
NAFU SA	National African Farmers' Union of South Africa
NAHF	National Animal Health Forum (South Africa)
NAMC	National Agricultural Marketing Council (South Africa)
NARF	National Agriculture Research Forum (South Africa)
NASFAM	National Smallholder Farmers Association of Malawi
NAU	National Agricultural Union (Namibia)
NECFU	Namibia Emerging Commercial Farmers' Union
NERPO	National Emergent Red Meat Producers' Organisation
NWGA	National Woolgrowers' Association
OIE	World Organisation for Animal Health
PAMA	Poultry Agricultural Management Association
PAZ	Poultry Association of Zambia
PIAM	Poultry Industry Association of Malawi
PPAZ	Pig Producers' Association of Zimbabwe
PPR	Peste des petits ruminants
ReNAPRI	Regional Network of Agricultural Policy Research Institutes
RMIF	Red Meat Industry Forum
RMIF	Red Meat Industry Forum (South Africa)
RPO	Red Meat Producers' Organisation
SAAPA	South African Agri-Processors Association
SACAU	Southern African Confederation of Agricultural Unions
SADC	Southern African Development Community
SAFA	South African Feedlot Association
SALMF	Southern Africa Meat and Livestock Forum
SAPA	South African Poultry Association
SAPA	South Africa Poultry Association
SAPPO	South African Pork Producers' Organisation
SAPPO	South African Poultry Producers' Organisation
SAVA	South African Veterinary Association
SFOAP	Support to Framers' Organisations in Africa Programme
SMI	Swaziland Meat Industries (Ltd)
SMMA	Stockfeeds Manufacturers Association
SPS	Sanitary and Phyto- Sanitary
TAU SA	Transvaal Agricultural Union of South Africa
UNCCC	United Nations Framework Convention on Climate Change
UNECA	United Nations Economic Commission for Africa
USAID	United States Agency for International Development
VET-GOV	Reinforcing Veterinary Governance Programme (AU-IBAR)
WEF	World Economic Forum
ZADF	Zimbabwe Association of Dairy Farmers
ZAMBEEF	Zambian Beef
ZCFU	Zimbabwe Commercial Farmers' Union
ZFU	Zimbabwe Farmers' Union
ZHB	Zimbabwe Herd Book
Zim-ACP	Zimbabwe Agriculture Competitiveness Programme
Zim-ASSET	Zimbabwe Agenda for Sustainable Socio-Economic Transformation
ZNFU	Zambia National Farmers' Union
ZPA	Zimbabwe Poultry producers' Association

EXECUTIVE SUMMARY

Overview of livestock production in the southern African region

- Although southern Africa has substantial land and animal resources, productivity of the livestock sector is generally low in the sub-region. Consequently most of the countries are net importers of livestock (except Botswana and Namibia beef), livestock products and livestock feed resources (except Tanzania and Zambia). Meanwhile, projections are that food production will have to double in the next 30 -40 years; and most of this increase will take place in the continent and sub-continent specifically, where production resources are still marginally utilised. This suggests that much effort needs to be dedicated to overcoming impediments to production, especially in the smallholder farming systems which dominate the region. For smallholder farmers it was suggested that aggregation was the only way they can be competitive in the mainstream markets.
- The region is said to have restrictive trade laws, policies and regulations which impede intra-regional flow of products, even amongst countries that have trade agreements.
- Some countries have endeavoured to grow their livestock industries (especially poultry and dairy) using protectionist policies and providing financial support to start off the industries (e.g. poultry in Botswana, Mozambique and Malawi). It has also recommended that control boards may be useful for providing stable markets for the fledgling industries because they offer guaranteed prices and, in times of a glut can absorb excess for resale later or to other markets. However strong advice provided during the SACAU livestock conference was to keep markets as free and transparent as possible, and that the only controls should be for sanitary and phyto-sanitary reasons.

Livestock producer organisations and linkage to the unions

- The region has a good distribution of producer organisations in each country, in terms of coverage of the livestock commodities and age of the organisations. This offers an opportunity of producer organisations learning from each other across countries and the age gap (experience) within the region.
- The established producer organisations had capacity to, focussed on and preferred to handle all matters related to their industries and delegate cross-cutting issues to the unions (if they were well-established). They were well-managed, could generate and/or source the information that they required for decision making, lobbying and advocacy. They had adequate resources to perform most of their major functions and even provided assistance to their governments in resolving critical threats to the industries (e.g. SAPPO and stamping of ASF, NAHF and compiling the South African dossier for application for FMD free status and LPO in monitoring of the codon and border fences).
- Producer organisations of smallholder farmers were able to articulate their constraints to production and market access but were not equipped with adequate information and lobbying and advocacy skills to enable them to put up convincing cases of their challenges and practicable solutions. In most instances the solutions were that “government should ...” However, the work that was conducted by Heifer International in Malawi and ILRI in the region demonstrated that perceptible growth in lobbying and advocacy and in addressing constraints to production and market access could be achieved through interventions at grassroots level to empower farmers and their leaders with knowledge and skills to deal with their challenges. A point to note is that some of the producer organisations were not linked to any unions, and it could be advisable to strengthen them in order that they are not only able to deal with their issues but are able to link up to existing unions and require from them the services that are due to them.

The unions and relations to livestock producer organisations

- Like the producer organisations, unions ranged from the long-established and well-resourced ones to fledgling ones that are still grappling with setting up their internal structures, and do not yet have

adequate sources of well-researched evidence to back up the lobbying and advocacy that they perform. The established unions seemed to have fairly defined roles with respect to the services that they offer their members. There was also a fairly good understanding of the issues that the unions should handle at national level and what should be delegated to regional level (e.g. Annex 10).

Possibility for coordination of livestock issues at regional level

- There have been a number of suggestions on matters for regional collaboration with respect to the livestock industries, which indicates that there is indeed a need and a willingness to tackle matters at that level. SACAU has already made significant progress in preparing to deal with livestock issues at regional level by conducting consultations on whether or not there is a need for such an intervention and if so in what form. SACAU is well-placed to handle regional livestock issues because its consultations did not only cover livestock role players from its 17 member organisations only but from across the entire region. The issues that have emanated from the consultations are broad enough and will benefit all producers regardless of whether or not they are SACAU members. Furthermore SACAU has built a strong capacity and networks to lobby at regional and at international level, which the livestock platform (whatever form it takes) could take advantage of.
- Within the southern African countries there were a number of support institutions for strengthening and supporting farmer organisations that could be worth replicating/stretching across the region. These include institutions that were making effort to organise farmers and build their capacity for participating in the mainstream markets as well as for lobbying and advocacy (e.g. Heifer International, ILRI and Madagascar's Directorate for Professionalisation, Zim-ACP), and those assisting farmer organisation to access scientific-based information for decision-making and lobbying and advocacy (e.g. Heifer International, ILRI, Zim-ACP, LMAC and BFAP) and national platforms for engaging on livestock issues (e.g. the livestock forums of Zimbabwe and Namibia, the RMIF and NAHF of South Africa).

A comment on the VET-GOC Policy Hubs

The VET-GOV Policy Hubs seemed a good and welcome platform to bring together concerned parties in an institutional arrangement to ensure effective and efficient veterinary services. In some instances, however, the Policy Hubs' activities were not well-mainstreamed into the ministries such that they seemed to be an additional project than an effective centre for coordination. The VET GOV Policy Hubs seemed to work better where they were coordinated by senior officials in the ministries, who could easily delegate staff and resources to the tasks at hand.

Proposed strategies and required capacity to implement the strategies at national levels

- 1. Building the production capacity, especially of smallholder farmers.** Scale up use of approaches such as the innovation platforms that are employed by ILRI and other CGIAR institutions and the training that is provided by Heifer International to build capacity for identification and resolution of production and market access challenges. This should target existing smallholder producer organisations who have shown initiative and drive but lack of capacity to resolve their challenges.

Learning amongst the countries within the region should be encouraged and facilitated.

- 2. Training of local farmer organisations in leadership, governance, policy formulation and analysis, and effective lobbying and advocacy.** The Zim-ACP and Heifer International type of training could be coordinated and done for farmer leaders (perhaps at regional level). The Food, Agriculture, Natural Resources and Policy Analysis Network (FANRPAN) is another institution that could be engaged to provide training, specifically in policy analysis and formulation.

Furthermore, farmer organisations should be encouraged/assisted to establish linkages with research institutions such as BFAP, Agriculture Research Council (ARC) of South Africa, the National Agricultural Marketing Council (NAMC) of South Africa and the universities for the collection, collation and analysis of production and marketing trends data. Some of the networks (e.g. with ReNAPRI could be established through AU-IBAR). Where feasible, livestock industries should establish an institution similar to the LMAC, which would conduct the research for all the industries, and thus reduce the overhead costs of attempting to do such research in-house.

- 3. Training of farmers and government officials on the latest techniques and skills specifically related to the sector e.g. artificial insemination (AI) and embryo transfer (ET) technologies.** A regionally coordinated programme for such training of trainers could be established for extension officers and selected technical persons in farmer organisations.
- 4. Strengthening of veterinary and veterinary laboratory services and facilities.** AU-IBAR should assist the farmer organisations (through the national policy hubs) to influence the training of veterinarians and para-veterinarians that are specific to the sector needs (e.g. poultry in Botswana, all veterinarians in Malawi). AU-IBAR should assist the farmer organisations to lobby that governments strengthen the capacity of local veterinary laboratories as well as share laboratories with other laboratories with comparative advantage in the region (e.g. Botswana Vaccine Institute is regarded to be highly competitive in FMD- vaccines and so could be supported to be the regional centre for such vaccines).
- 5. Coordination of producer forums at national level and collation of national information.** Raised platform of livestock within unions (e.g. the livestock forums of Zimbabwe and Namibia; the NAHF of South Africa) could be established as platforms for discussing and resolving common industry specific issues through internally generated solutions or lobbying and advocacy.

Proposed strategies and required capacity to implement the strategies at regional level

At the end of the VET-GOV workshop in South Africa, all participants were satisfied with the proposal of SACAU as the coordinator of regional livestock issues given the progress that the organisation had made in this space.

The recommended regional strategies were as follows:

- 1. Training of farmer organisation leaders on regional trade/SPS and production issues.** This could be facilitated by AU-IBAR through SACAU and, if possible in collaboration with the SADC Secretariat who have implemented such training workshops under the Regional Economic Integration Support (REIS) funded by the European Union.
- 2. Establishment and coordination of a regional livestock platform, collation of regional information and coordination of regional best practices.** This would require strengthening the capacity of SACAU to handle this aspect, and SACAU has indicated that it would most likely draw expertise from its member organisations to perform some of these functions.

The regional interactions should be on one or two issues that are not contentious and on which common ground could be reached in reasonable time without diminishing interest in the meetings. SACAU could start off with existing regional forums such as the poultry, dairy and facilitate the establishment of those that are not there yet or are struggling (e.g. SALMF) or establish on forum for all commodities. The decision on this matter will be finalised in a regional meeting of 8 July 2014.

- 3. Provision of current livestock information on production trends in the region, available markets and their viability** (cost benefit analysis). SACAU should be an information hub for benchmarking and informed lobbying on bilateral or multilateral trade issues within and outside the region. SACAU could perform this function, supported by inputs from member organisations and institutions such as ReNAPRI, and regional bodies such as SADC and COMESA.
- 4. Enhance and promote competence of professionals in the sector.** SACAU should maintain a database of available and scarce skills in the sector. The regional organisation and its member organisations in the region could lobby national education systems and funders of education and training (national, regional and international) to target the scarce skills in their training programmes (both in the development of the training curriculum and actual provision of training). This will be one of the critical steps in preparing the sub-continent to meet the levels of production that are expected in the next 30-40 years.
- 5. Lobbying and advocacy for livestock at regional level.**
 - SACAU should provide input into relevant regional structures (e.g. SADC Food, Agriculture, Natural Resources and Environment Ministerial Committee, SADC Livestock Technical Committees and CCARDESA).
 - SACAU to encourage active SADC LTC sub-committees in each of the countries, with industry participation.
- 6. Resource mobilisation.** AU-IBAR, SACAU and national association could collaborate to mobilise resources that are required to perform all the above-mentioned strategies.
- 7. SACAU should be strengthened with both human and financial resources to handle livestock specific issues as suggested above.** While the regional organisation is content with sourcing of expertise from its member organisations, it might prudent to appoint a member of staff specifically dedicated to initiating and driving this work for at least a three year period, with a specific mandate for a sustainable exist strategy.

I. INTRODUCTION

The African Union Interafrican Bureau for Animal Resources (AU-IBAR) wishes to build a better understanding of the place of livestock in regional farmer organisations to enable better targeting of the Veterinary Governance (VET-GOV) programme. This is part of the VET-GOV strategy, which in part, aims to strengthen regional institutions in order to enable them to play their roles of coordination, harmonisation, integration and support to countries with the aim of stimulating a more conducive environment for public and private investment in the livestock sector.

To that end AU-IBAR has commissioned an evaluation of the regional farmer organisations in order to understand their scope of engagement with livestock issues and their capacity to facilitate engagement with these issues.

The report outlines the approach that was taken in the evaluation and provides a consolidated description of the findings, addressing each of the specific objectives as outlined in the scope of the study. It does not provide a detailed narration on each of the countries and institutions that were covered in the study but some details on some of the institutions are provided in order to support an observation drawn from the consultations. The report initially focuses on the livestock production environment in the sub-continent, in which the farmer organisations operate. This is followed by a discussion of the producer organisations, the farmers' unions and in-country support institutions. The regional issues that were identified by the institutions that were consulted are provided and then focus turns to SACAU and the functions that it performs for the livestock sector at regional level. A summary of findings is drawn up based on which recommendations are made for strategies to increase national and regional livestock keeper organisations' role in the internal governance and functions of the regional farmer organisations as well as the required capacity to implement the recommendations.

1.1 Background and context

Although AU-IBAR is conducting this evaluation across the entire continent, this particular report focusses on southern Africa and most of the reference work will be drawn from the sub-continent and where necessary, relevant examples from other parts of the world will be cited.

The regional farmer organisation in southern Africa is the Southern African Confederation of Agricultural Unions (SACAU). It was established in 1992. Its main objectives are as follows:

- To foster mutual cooperation and understanding between farmers' organisations, agricultural leaders and the farming community in Southern Africa with a view to strengthening the voice of agriculture and promoting the well-being of farmers and the viability of agriculture in the region
- To establish a forum for the discussion of matters of common concern and in the process to promote common understanding of and approach to such matters
- To disseminate views and information to agricultural organisations, governments and other bodies in Southern Africa as well as internationally.
- To foster goodwill and understanding between member organisations and their leaders.

In essence, the objectives of SACAU are concerned with strengthening the capacities of farmers' organisations, by providing a collective voice for farmers on regional and international matters, and by providing agriculture related information to its members and other stakeholders. Nothing in the objectives of the organisation indicates particular bias towards any commodity although, in the terms of reference, and in anecdotes within the region, it is said that such regional bodies tend to be crop- oriented.

The list of SACAU members and their contact details is provided in Annex I. Their vision or major objective statements are shown in Table I.1.

Table I.1. Members of the Southern African Confederation of Agricultural Unions

SACAU member	Country	Main objective/vision/goal	Membership
Agricultural Council of Tanzania (ACT)	Tanzania	To be the leading private sector apex organisation, pursuing the prosperity of all Tanzania agricultural stakeholders	Farmer groups, associations, cooperatives, companies and institutions whose activities have relationship with agriculture, e.g. farming, livestock keeping, fisheries, beekeeping, and people engaged as researchers, traders, processors, transporters etc.
African Farmers' Association of South Africa (AFASA)	South Africa	To have competent and successful commercial farmers of South Africa	Three commodity associations (GrainSA, NERPO & Deciduous Fruit Developing Chamber) + individual farmers
Agri-SA	South Africa	Promotes on behalf of its members, the development, profitability, stability and sustainability of commercial agriculture in South Africa by means of its involvement and input on national and international policy level.	9 provinces, 24 commodity associations (including 7 livestock associations for milk, red meat, wool, mohair, pork, ostrich and wildlife)
Botswana Agricultural Union (BAU)	Botswana	The producer organisations and representatives of the ministry of agriculture that were consulted in Botswana were not aware of BAU. SACAU has said that they will assist the union to set up its structures in the country.	
Commercial Farmers' Union of Zimbabwe (CFU)	Zimbabwe	The CFU's core belief is that only through an optimal agricultural business operating environment can our desire for maximum economic growth, farmer empowerment and sustainable poverty alleviation be achieved	Individuals, companies, co-operatives, associations of small scale farmers etc. who earn their principle, or a significant income, from primary agricultural activities. Also have Corporate, extended & affiliated members
Coalition Paysanne de Madagascar (CPM)	Madagascar	Raise awareness among farmers to get socially and economically organised to promote agriculture, livestock, fisheries and handicrafts.	Individual farmers
Madagascar-Fivondronamben'ny Tantsaha Malagasy (FEKRITAMA)	Madagascar	Education, information and advocacy; Innovation and technology transfer; Defence of public or private interests; training	Regional structures
Lesotho National Farmers' Association (LENAFU)	Lesotho	To be a leading umbrella voice of all farmers and farmer organisations in Lesotho, responsive to all their needs in profitable, sustainable agriculture.	Individual members, regional organisations and commodity associations.
Farmers' Union of Malawi (FUM)	Malawi	Ensure that farmers effectively and meaningfully participate in the design, formulation, implementation, monitoring and evaluation of policies, strategies, programmes and plans aimed at improving their livelihoods in Malawi.	Individual farmers

SACAU member	Country	Main objective/vision/goal	Membership
National Smallholder Farmers Association of Malawi (NASFAM)	Malawi	To be the leading smallholder-owned business and development organisation in Malawi, producing economic and social benefits for members, their communities and the country.	Individual members
Namibia National Farmers Union (NNFU)	Namibia	Increase food production for household food security, enhance marketing of farming products to increase household income, increase participation and recognition of women in farming, contribute to environmental protection and sustainable utilization of natural resources.	National federation of regional farmer unions
Seychelles Farmers Association (SEYFA)	Seychelles	A vibrant, prosperous and profitable farming community to contribute meaningfully to food production and economic growth in Seychelles	Individual farmers
Swaziland National Agricultural Union (SNAU)	Swaziland	Promote and safeguard the interests of all farmers in Swaziland by linking them with their stakeholders and facilitate production, access to land, water , markets, research and technology	Regional farmer unions and national commodity associations.
Unao Nacional de Camponeses (UNAC)	Mozambique	Build the capacity of local peasants' organisations to enable them to demand their	Peasant organisations
		rights and participate in policy making, increase the participation of women in leadership positions to reduce gender inequality, utilize traditional peasant knowledge to improve production systems and build alliances throughout Mozambique and strengthen ties with international networks.	
Zimbabwe Farmers' Union (ZFU)	Zimbabwe	To promote and advance farmers' interests and welfare through representation, networking, information dissemination, capacity building, formation of commercially viable enterprises, environment, gender and HIV mainstreaming, and mobilisation of resources and members.	Small, medium and large scale farmers
Zambia National Farmers Union (ZNFU)	Zambia	Promoting and safeguarding the interest of members as individuals farmers, corporations /companies purveyors and other organisation involved in the business of agriculture	Small and large scale farmers and agribusiness

SACAU member	Country	Main objective/vision/goal	Membership
		in order to achieve sustainable agriculture ,economic and social development	

The national unions are constituted of provincial/regional farmer organisations, commodity associations and individual members (e.g. AFASA). Not all commodity associations are necessarily affiliated to the unions and possibly not all role players in the livestock sector have any association with the unions. For example, in South Africa at least all of the livestock related associations (including wild life ranching) are affiliated to the unions, and mainly AgriSA. However the South African Feedlot Associations (SAFA), which plays a large role in imports of weaners from the Southern African Customs Union (SACU region; i.e. Botswana, Lesotho, Namibia and Swaziland) is not a member of any of the unions.

In some countries, national unions have moved on to establish platforms at higher levels, such as the Agri-Sector Unity Forum (ASUF) in South Africa and the Zimbabwe Farmers' Alliance Trust (ZFAT) in Zimbabwe. In these two instances, the platforms serve to bring together the established commercial sector (represented by AgriSA, TAU-SA, Agbiz and the South African Agro-processors Association (SAAPA) in South Africa and CFU in Zimbabwe) and the developing/smallholder farmers (represented by AFASA and the National African Farmers' Union of South Africa (NAFU-SA) in South Africa and ZFU in Zimbabwe) for collaboration with a view of promoting the best interests of the respective agricultural sectors.

Not all the national unions are members of SACAU possibly because they have not tried to be, do not see the value in participating or do not meet the criteria for membership. South African and Zimbabwean examples of unions that are not in SACAU are NAFU- SA and TAU- SA of South Africa, and the Zimbabwe Commercial Farmers' Union (ZCFU) and the Eastern and Southern African Small-scale Farmers' Forum (ESAFF) of Zimbabwe. Given that this study focuses on regional farmer organisations and their representation of livestock issues, it would be of interest to determine the extent to which SACAU is able to capture the pertinent issues on livestock from its membership and whether or not the absence of certain organisations impacts on the organisation's effectiveness in capturing and attending to the major issues of regional importance.

There are a number of regional commodity associations but only two deal with livestock matters, namely, the Eastern and Southern Africa Dairy Association (ESADA) and the Southern Africa Meat and Livestock Forum (SALMF). The latter was established by role players in the meat and livestock industries in Southern Africa as a platform for sharing information and developing common regional strategies for handling livestock diseases and intra-regional trade matters. At its initiation the SALMF was attended by all countries in the southern African region and would be organised to coincide with the SADC Livestock Technical Committee meetings. In later years (2005-6) only South Africa, Namibia, Botswana and Zimbabwe were participating in SALMF. The forum has not set since the mid-2000s but there seems to be some interest to resuscitate it; at least from the South African role players. The evaluation endeavoured to whether regional commodity associations such as SALMF have a possible role to play in advancing regional livestock issues and if so what sort of linkages should they have with SACAU.

Some work has been done on the profiling of farmer organisations within SACAU by Jere (2005) and the potential areas of regional cooperation in the livestock sector of southern Africa (SACAU, 2013). These and similar evaluations were considered in the development of a work plan and the recommendations from this evaluation.

1.2 Purpose and scope of the evaluation

The objective of the consultancy is to create a better understanding of the place of livestock in regional farmer organisations within the SADC including the scope of issues that are addressed, capacity and internal arrangements that are in place to facilitate engagement with livestock issues for future VET-GOV Programme support. The specific objectives, as spelt out in the Terms of Reference (Annex 2) are as follows:

- Map the regional producer organisations and describe how that have evolved in the last 10 years in form and functions/services provided;
- Understand the current scope of work/issues being undertaken/addressed by the regional farmer organisations;
- Understand the current institutional and governance arrangements in place in the regional farmers' organisations to support livestock related work including horizontal and vertical linkages to national and international organisations;
- Understand the current livestock (by species/ value chains and themes), related work (social, economic and political) being undertaken by the regional farmer organisations and the strategies that are used;
- Propose strategies to increase national and regional livestock keeper organisations' role in the internal governance and functions of the regional farmer organisations;
- Identify capacity building requirements needed to support the regional farmer organisations to strengthen their lobbying activities towards livestock related issues; e.g. ensuring that livestock objective are included in economic growth, food security and poverty reduction agendas.

1.3 Scope of the task and outputs

These are clearly outlined in the terms of reference as follows:

The consultancy covered countries in which SACAU has membership and performed the following specific tasks:

- a. Carry out a literature review of the regional farmers' organisations and hold discussions with AU-IBAR VET-GOV Programme staff Prepare an inception report on how the assignment will be carried out including methodology, work plan and proposed budget for the assignment.
- b. Hold a meeting with AU-IBAR and VET-GOV Programme staff to discuss the inception report Contact relevant VET-GOV Regional Coordinators to arrangement appointments for field visits to the regional farmers' organisations.
- c. Carry out field work/field visits to the regional farmer organisations.
- d. Prepare draft report for the assignment.
- e. Discuss the draft report with AU-IBAR and VET-GOV Programme staff. However, representatives of the farmer organisations that were consulted were invited to a workshop that was held in Pretoria on 28 – 30 April 2014 to discuss the findings and recommendations as presented in the first draft report.
- f. Prepare a final report for the assignment.

The expected outputs are an inception report; draft final report and final report.

2. METHODOLOGY

2.1 Methods of data collection and analysis

Data collection was mainly through semi-structured interviews of key informants in national and regional farmer organisations, government offices that are responsible for the livestock sector and other key stakeholders for the study as identified by Vet-GOV, representatives of farmer organisations (e.g. Executive Directors, President/Chairperson or recommended personnel in senior management) and government officials. Semi-structured interview guidelines were drawn up for each of the following groups of institutions:

- Representatives of farmer unions in the country
- Representatives of national livestock associations
- Representatives of key government officials who deal with livestock matters (such as the Departments/ Divisions of livestock production, veterinary field services and sector support programmes in the ministries of agriculture).
- Representatives of other key stakeholders (identified by VET-GOV, farmer organisations and government officials).

To complement the primary data, a review of existing literature was conducted (e.g. annual reports, project reports, on the role and capacity of farmer organisations in facilitating engagement with livestock and other issues at national and regional level, specific role and capacity of the farmer organisations in the southern African region).

2.2 Evaluation questions

The study focussed mainly on organisations that represent cattle, sheep, goat, pigs and poultry producers. The extent to which detailed information was gathered depended on the available time for consultations (which ranged from half a day in Botswana to two days in some countries) and the respondents' readiness to share documents.

The following set of information was gathered during the evaluation:

Government officials:

- Livestock production statistics
- National livestock strategic plan
- Strategies and degree of interaction with farmer organisations in planning, implementation and evaluation of livestock policies and programmes
- Opportunities and challenges for the livestock sector
- Opportunities and challenges for national farmer organisations
- Recommendations for farmer representation in the country and linkage at regional level in order to ensure that livestock matters are well represented at regional, continental and international fora.

For livestock associations

- Membership and constitution
- Structure
- Strategic plans
- Interaction with members
- Linkages with the livestock value chains (nationally and regionally)
- Interaction with government and other major stakeholders, nationally
- Linkage with unions, nationally, regionally and internationally

- Benefits (if any) from the interactions with government, national unions and regional and international organisations

Farmers' unions:

- Membership and constitution
- Structure
- Strategic plans (especially for livestock if any specific ones)
- Interaction with members
- Interaction with government and other major stakeholders nationally
- Linkage with commodity associations, other unions and the rest of the livestock value chain nationally, regionally and internationally
- Benefits (if any) from the interactions government, national unions and regional and international organisations

SACAU and regional commodity associations:

- Membership and constitution
- Structure
- Strategic plans (with special attention to any matters that are specific to the livestock sector)
- Interaction with members
- Interaction with government and other major stakeholders regionally and internationally
- Linkage with regional commodity associations, and the rest of the livestock value chains in member countries, regionally and internationally
- Examples of benefits to the livestock sector that were/could be derived through the involvement of the regional farmer organisation.

Other stakeholders (identified by VET-GOV programme officers, farmers' organisations of government officials in livestock related services)

- Role of livestock associations in the development of the livestock industry in the country
- Models to emulate, lessons to be learnt
- Opportunities and challenges for farmer organisations in the country (and specifically with respect to representation of farmer issues).

The draft questions for the semi structured interviews are attached in Annexes 3 - 6.

2.3 Sampling strategy and data collection plan

The consultancy was conducted in 9 out of the 12 countries from which the 17 member organisations of SACAU come from as shown in Table 2.1. Consultations in Tanzania and Zambia were covered under the Common Market for Eastern and Southern Africa (COMESA) but the findings and recommendations are included herein. Angola was not included because it did not fall within the sampling frame (i.e. countries in which SACAU has membership) and Seychelles was omitted because of accessibility. It would have taken a full week to travel to and from Seychelles because of limited air-transport connectivity between the country and rest of the region.

The aim was to spend one to two working days in each of the countries and in that time conduct interviews with the groups identified in Table 2.2.

Table 2.1. Work plan

Activity	Output	Done by
Drafting of inception report	Report detailing the conceptual framework planned for undertaking the evaluation	3 March 2014
Presenting of inception report to AU-IBAR, & VET-GOV	Finalisation and approval of work plan	17 March 2014
Arrangement of appointments in the 11 selected countries and through VET-GOV Regional Coordinators	Schedule of appointments with representatives of selected institutions (if possible some of the interviews could be arranged with relevant delegates who will be attending the 10th CAADP partners' platform in Durban)	21 March 2014
Consultations with representatives of the selected institutions	Reports of at up to 2 day consultations in each of the 12 countries with unions that are members of SACAU.	23 April 2014
Submission of first draft report	Draft report	27 April 2014
Discussion of draft report with AU-IBAR, VET-GOV and representatives of farmer organisations that were consulted	Inputs from AU-IBAR/VET-GOV and workshop participants to be incorporated into the final report	30 April 2014
Submission of draft final report	Draft final report	5 June 2014

Table 2.2. Time spent in each country and the targeted institutions for interviews

Country	Target institutions	No. of days	Actual dates
Kenya	AU-IBAR, OIE, FAO & VET-GOV to present inception report	1 day	17 March 2014
Lesotho	LENAFU, Lesotho National Dairy Farmers' Association, Lesotho National Wool & Mohair Growers' Association (LNWMGA), Basotho Poultry Association Government Officials in charge of veterinary services, animal production and sector support	2 day	25 – 27 March 2014
Swaziland	SNAU and any other identified farmers' union and livestock associations Government Officials in charge of veterinary services, animal production and sector support	1 day	27 – 28 March
Namibia	Namibia National Farmers' Union, Namibia Livestock Producers' Association, Namibia Dairy Producers' Association, Namibia Poultry Industries, Namibia Pig Producers' Association, Meat Board of Namibia Directorates of Veterinary Services, Engineering & Extension & Planning in the Ministry of Agriculture, Water & Forestry.	1.5 day	30 March – 1 Apr
Botswana	Botswana Agricultural Union, Botswana Dairy Association, Botswana Poultry Association Department of Animal Production (DAP) Department of Veterinary Services (DVS) Department of Extension Service Co-ordination (DESC)	1 day	3 - 4 Apr
Zimbabwe	CFU, ZFU, ZCFU, ESAFF, Livestock & Meat Advisory Council (LMAC) Department of Livestock & Veterinary Field Services & Agritex in the Ministry of Agriculture Any other key organisations that is involved with livestock farmer development.	2.5 days	6 -9 April

Country	Target institutions	No. of days	Actual dates
Malawi	National Smallholder Farmers Association of Malawi (NASFAM); Farmers' Union of Malawi (FUM), Poultry Industry Association of Malawi, Department of Agricultural Extension Services, Department of Animal Health & Livestock in the Ministry of Agriculture & Food Security	1.5 days	9 – 11 April
Madagascar	Madagascar-Fivondronamben'ny tantsaha Malagasy (FEKRITAMA); Coalition Paysanne de Madagascar (CPM) Government officials in livestock production and veterinary services	1 day	13 – 16 April
Mozambique	Uniao Nacional de Componesses Direcção Nacional dos Serviços de Veterinária and Direcção Nacional de Extensão Agrária in the Ministry of Agriculture	1 day	17 – 18 April
South Africa	Presentation of 1st draft report		27 April 2014
Total number of field days		19 days	
South Africa	SACAU, AgriSA, AFASA, TAU SA, NAFU SA, NERPO, RPO, NWGA, SAPPO, SAFA, RMIF, MPO, SAPA. Department of Agriculture, Forestry & Fisheries: Directorates of Veterinary Services, Animal Production & Sector Support	2 days	28 – 30 May 2014
South Africa	Presentation of final draft report		5 June 2014

The farmer organisations that were actually interviewed are listed in Table 4.1, the government ministries in Table 5.1 and other institutions in section 5.2.

2.4 Limitations to the Evaluation

The major limitation that were encountered were air transport connectivity, which resulted in shorter times spent in consultations in some countries. A second one was confirmation of appointments within target countries. Despite these challenges, the VET-GOV coordinators ensured appointments were secured with as many of the targeted institutions as possible. The consultations for South Africa were not adequately scheduled. They were allocated for a week in which the 10th CAAP Partners' Platform meeting was held in South Africa and consequently setting aside time for the interviews became a challenge. A few interviews were done in the week of 26 to 30 May at the SACAU Conference in Maseru. Despite the limitations, it seems that there was adequate consultations to come up with recommendations that are applicable to most farmer organisations in the region as well as for interventions at regional level.

3. OVERVIEW OF LIVESTOCK PRODUCTION IN THE SOUTHERN AFRICAN REGION

The overview of livestock production in Southern Africa is based on a desk top study of production and trade trends in the South African states (defined as the 15 members of the Southern Africa Development Community, SADC, for this purpose). The analysis will be confined to the major species of beef, sheep, goats, pigs and chicken though there are other animal species/products (e.g. fish, honey) that are a significant component of animal agriculture in some countries. The data considered in this section was drawn from FAOSTAT (2014) and the International Trade Centre (2014).

3.1 Livestock production trends in the past 10 years

The total land area of the 15 southern African countries that make up the SADC is 964 million ha. Of that, 422 million ha are agricultural land and 362 million ha are permanent pastures and meadows (FAOSTAT, 2014). Eight of the 15 countries have at least 40% of the national land area designated as permanent pastures and meadows, and thus suitable for the production of grazing animals. For 12 of these countries grazing land makes up at least 60% of the agricultural land (Figure 3.1). Thus there is justification to the concept that ruminant livestock production should be a significant component of agriculture production in these countries given the fact that a sizeable portion of land in the region is suited for this purpose.

The 10 year trends for cattle, sheep, goats, pigs and chicken numbers in the southern African states are shown in Figures 3.2 to 3.6. The region has about 67 million cattle, 49 million goats, 38 million sheep, 12 million pigs and 448 million chickens (FAOSTAT, 2014). Tanzania dominates cattle and goats production in the region, while South Africa dominates sheep production and generally has a strong prevalence of all species.

The slaughter rates for cattle, goats, sheep, pigs and chicken had a median of 11%, 33%, 27%, 85% and 165% respectively over the 10 year period (Annex 7). Notable slaughter rates are that of Mauritius which had a slaughter rate of between 118 and 202% over a 10 year period, indicative of the high volume of live imports.

Slaughter rates for goats ranged from about 15% in Namibia to 64% in Malawi. The range for sheep was 8% in Zimbabwe to about 45% in Botswana. Pig slaughter ranged from about 50% in Angola to about 160% in South Africa. The latter imports about 270,000 goats from Namibia per year.

These productivity indices are low compared to other major producers in the world. For example in 2012, beef cattle off take from Australia, New Zealand, China and the United States of America was in the range of 28 -38% and that of chicken was in the range of 400 to over 600% in Brazil, Argentina, China and New Zealand (Table 3.1). The off take range of 9 – 20% for cattle is typical of smallholder production systems in arid and semi-arid Africa (Otte & Chilonda, 2002).

The off take rates in southern Africa are indicative of the potential growth in the productivity of livestock sector that could be achieved in the sub-region, even without attaining that of the countries with the most prolific sectors.

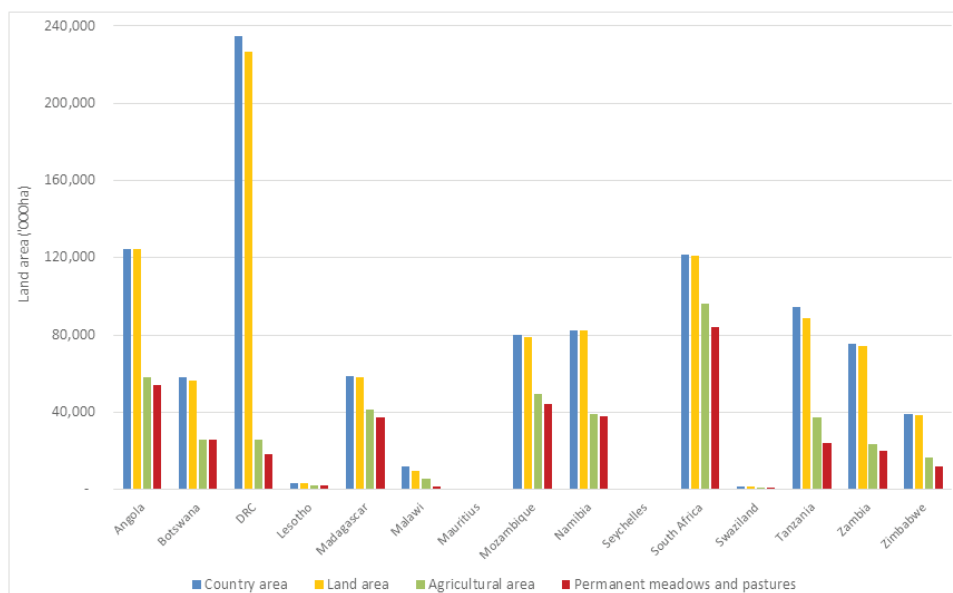


Figure 3.1 Land area, including agriculture and grazing land in 15 southern African states (FAOSTAT, 2014)

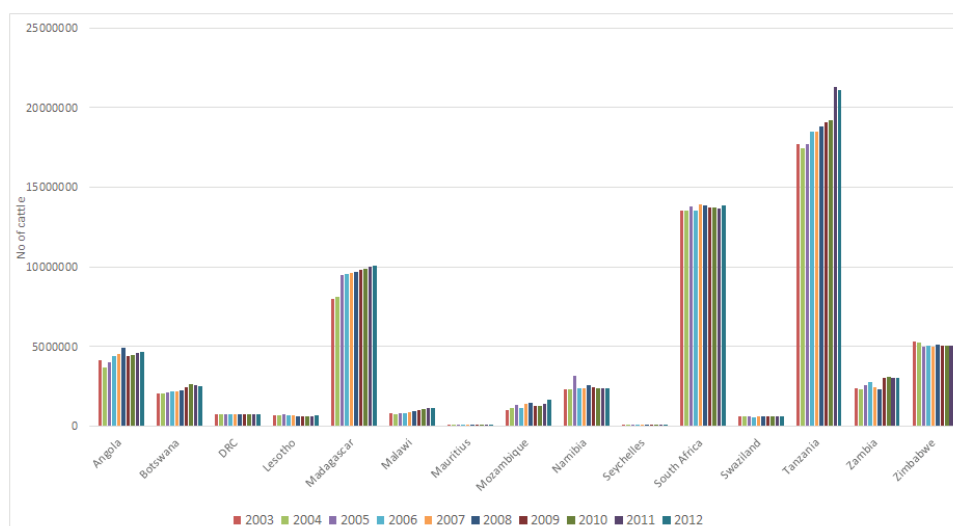


Figure 3.2 Trends in cattle numbers of 15 southern African states (2003 – 2012, FAOSTAT, 2014)

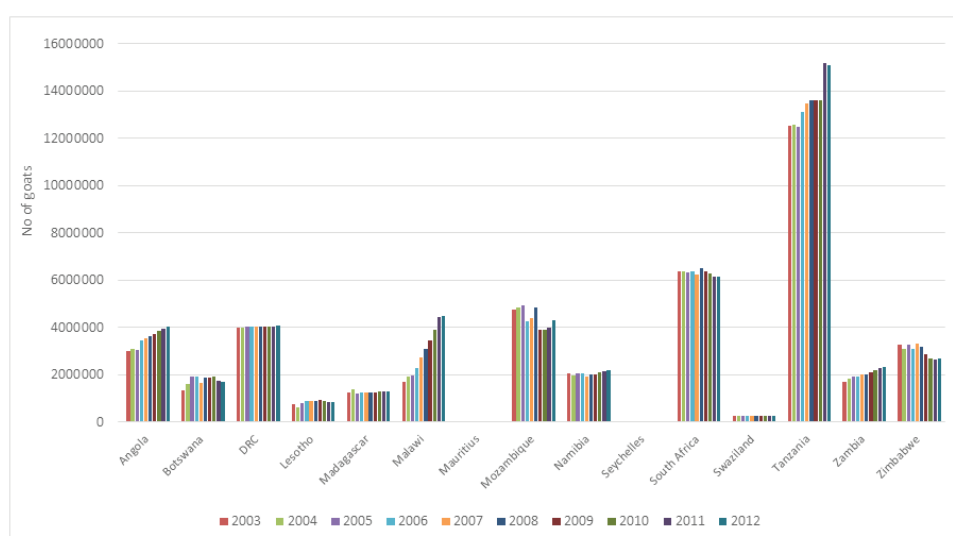


Figure 3.3 Trends in goat numbers of 15 southern African states (2003 – 2012, FAOSTAT, 2014)

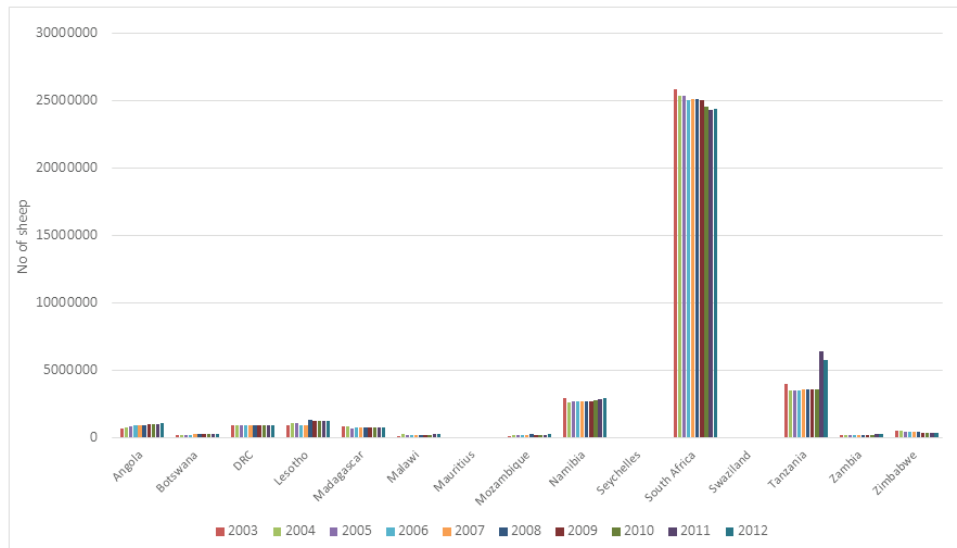


Figure 3.4 Trends in sheep numbers of 15 southern African states (2003 – 2012, FAOSTAT, 2014)

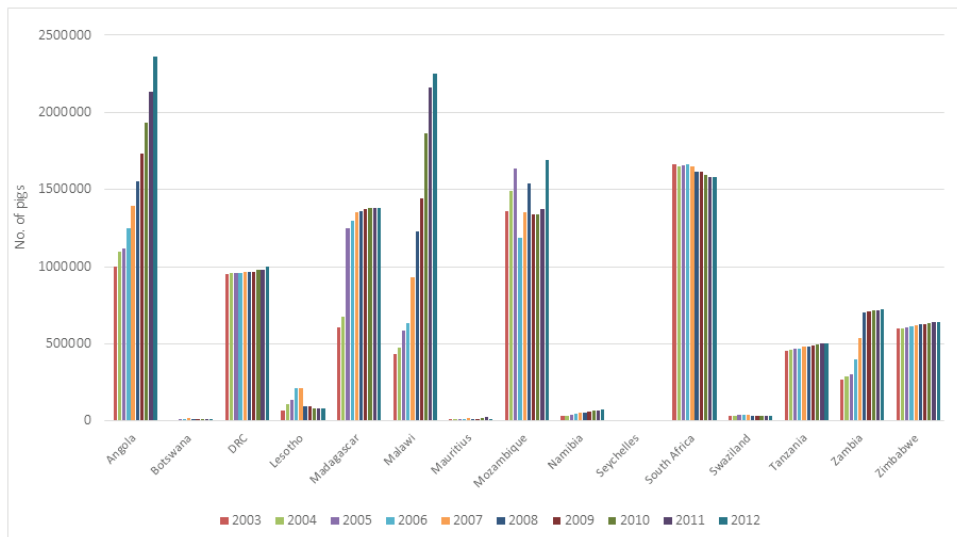


Figure 3.5 Trends in pig numbers of 15 southern African states (2003 – 2012, FAOSTAT, 2014)

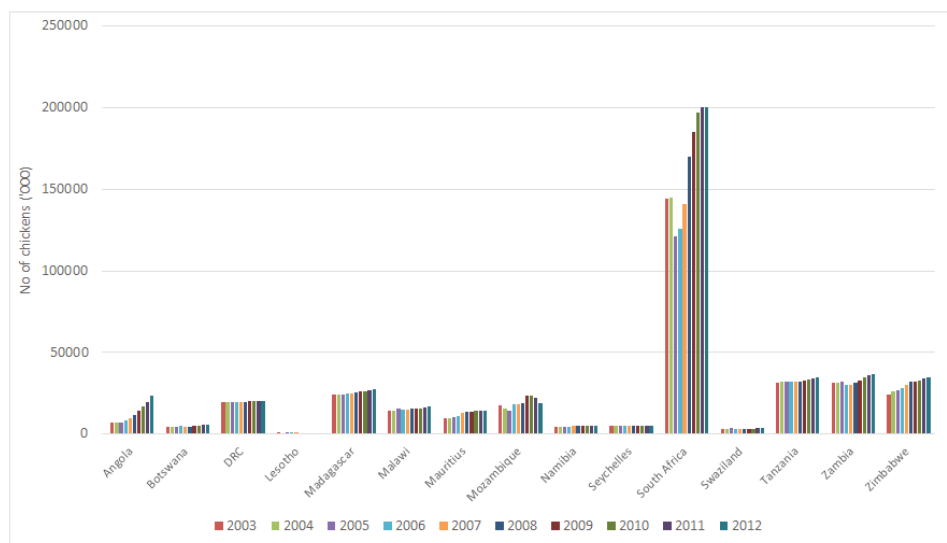


Figure 3.6 Trends in chicken numbers of 15 southern African states (2003 – 2012, FAOSTAT, 2014)

Table 3.1 Livestock numbers and off take rates in some of the major producers in the world (2012)

	Stock of animals					Proportion of stock that were slaughtered (%)				
	Cattle	Goats	Sheep	Pigs	Chicken ('000)	Cattle	Goats	Sheep	Pigs	Chickens
Argentina	4 750 000	4 350 000	16 300 000	2 400 000	105 000	24	34	28	144	652
Australia	28 418 422	3 550 000	74 721 551	2 137 921	100 996	28	29	33	221	550
Brazil	211 279 082	8 646 463	16 789 492	38 795 902	1 245 269	19	30	32	93	421
China	115 139 600	185 185 670	187 000	471 875	5 398 000	38	77	72	144	176
New Zealand	10 180 093	90 096	31 262 715	313 703	14 480	38	106	73	229	641
USA	90 768 500	2 862 000	5 365 000	66 412 800	2 700 000	37	0	42	171	318

The estimated carcass weights of the five species are shown in Table 3.2. There is a large variation in carcass sizes, which is a function of different genotypes, genetic and environment interactions on the breed performance and the management of the various breeds. The carcass yield from some of the leading livestock producers in the world are presented in Table 3.3 for comparison. Comparatively livestock in the sub-region yield small carcasses but the wide change of sizes suggest that there is room for improvement even from within the livestock genetic pool in the region.

Table 3.2 Carcass yield for cattle, goats, sheep, pigs and chicken from 15 southern African states (2012; FAOSTAT 2014)

	Carcass yield (kg/animal)				
	Cattle	Goats	Sheep	Pigs	Chicken
Angola	170	9	10	65	0.9
Botswana	200	12	14	36	0.7
DRC	173	12	10	46	0.6
Lesotho	150	8	10	50	0.8
Madagascar	128	15	12	70	0.8
Malawi	114	10	11	14	0.8
Mauritius	236	11	18	65	1.1
Mozambique	150	12	12	60	0.9
Namibia	247	12	18	55	0.8
Seychelles	200	11		80	1.4
South Africa	285	16	25	80	1.4
Swaziland	-	18	18	50	1.0
Tanzania	95	12	12	40	0.9
Zambia	160	12	14	44	1.0
Zimbabwe	225	12	14	55	1.2

Table 3.3 Carcass yield for cattle, goats, sheep, pigs and chicken from some of the leading livestock producing countries in the world (2012; FAOSTAT 2014)

	Carcass yield (kg/animal)				
	Cattle	Goats	Sheep	Pigs	Chicken
Argentina	223	7	11	88	2.43
Australia	269	25	22	74	1.87
Brazil	232	12	16	96	2.20
China	144	13	16	74	1.39
New Zealand	156	11	20	69	1.83
USA	350	-	32	93	1.99

The milking herd of the southern African states was about 12.7 million cows in 2012 and distributed in a similar pattern with the beef herd; in that a high proportion of this herd (84%) is in Tanzania, Madagascar, South Africa and Zimbabwe.

Milk yield from the cow herd is shown in Figure 3.8. The median yield over the 10 year period was 430 kg/cow per annum. Only South Africa has yields, with a 10 year average milk yield of 3 411 kg/annum per year. For the rest of the countries in the region, productivity is low.

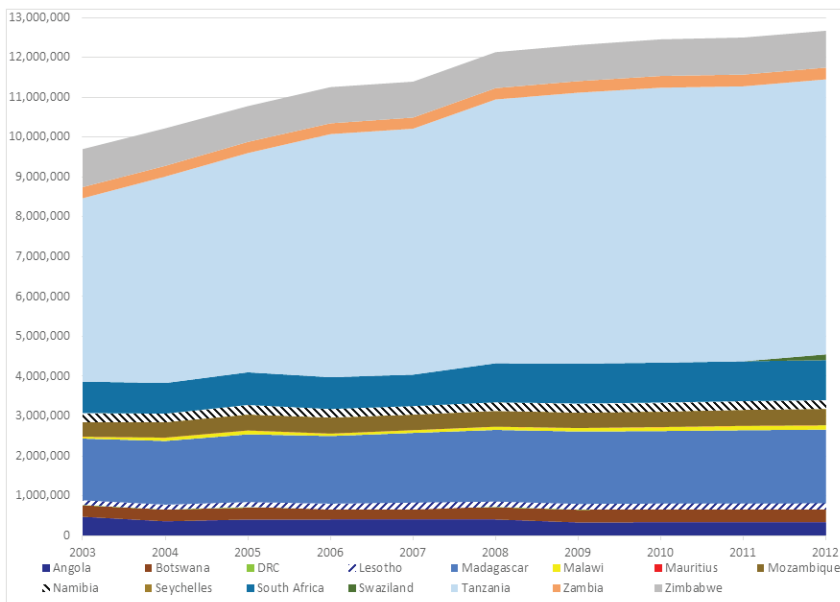


Figure 3.7 Trends in number of milking cows of 15 southern African states (2003 – 2012, FAOSTAT, 2014)

One of the major opportunities in present day livestock production is that with the anticipated world population of over 9 billion by 2050, the world will need to produce as much food in the next 40 years as it has done in the last 500 years (Figure 3.9) and it is anticipated that a major increase in food production will happen in sub-Saharan Africa where most of the agricultural resources are still comparatively marginally utilised. For that reason economist suggest that productivity of African livestock will need to be improved greatly in order to fulfil this need. Furthermore, the impact of methane emissions from ruminant livestock will also force the world to be more efficient in livestock production in order to minimise the emissions per unit product, and hence the contribution of livestock production to global warming and climate change. These predictions suggest that the productivity of livestock in the sub-region will have to increase tremendously to meet the food demands and simultaneously mitigate the poor image of livestock as a major contributor to global warming.

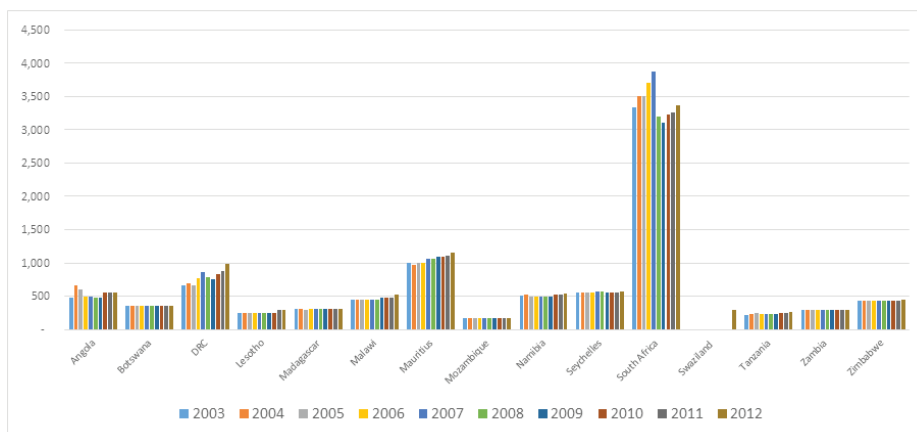


Figure 3.8 Trends in milk production (kg) per cow in the 15 southern African states (2003 – 2012, FAOSTAT, 2014)

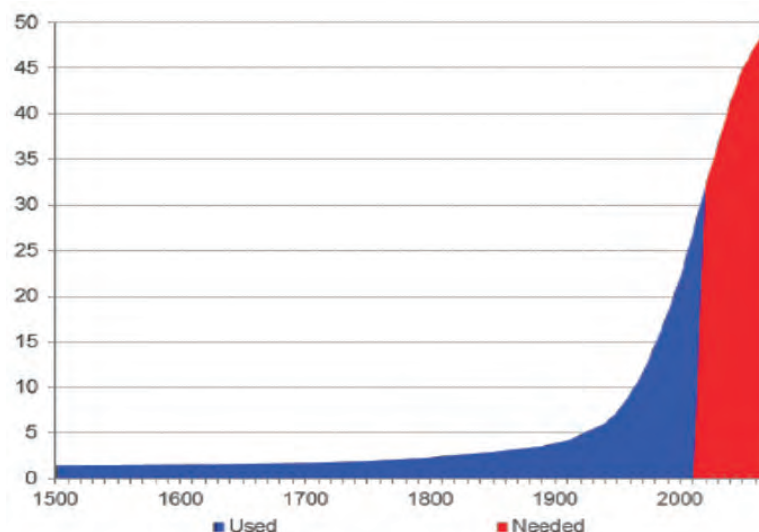


Figure 3.9 Historic and predicted global food demand (petacal/day) for the period 1500 to 2060 (Janovsky, 2014)

3.2 Livestock trade

Most countries are net importers of animal and animal products (Figures 3.10 & 3.11; Annexes 8 & 9). Only Namibia and Mauritius had a positive livestock trade balance for most of the last 10 years (Figure 3.10) and Botswana and Namibia enjoyed a consistently positive trade balance for meat and edible offal (Figure 3.11).

In terms of fodder and feeding stuff, only Zambia and Tanzania were self-sufficient for these products in the past 10 years (FAOSTAT, 2014). The rest of the countries in the sub-region are net importers of fodder and feeding stuff. Similarly all southern African countries are net importers of eggs and milk (FAOSTAT, 2014).

During the recent SACAU Conference on livestock which was held in Maseru on 26 – 28 May 2014, it was brought up that besides the low volumes of tradable stock, inadequate transport infrastructure, inefficiencies in customs procedures (including delays at road checks, borders and ports), poor quality and costly procedures as well as technical regulations and standards that are applied in a discriminatory fashion hamper trade in the region (Ngosa, 2014; Cronje, 2014). The current level of production, trade balances and status of trade policies suggest that much attention should be paid to improving productivity and harmonising standards for imports as well as facilitating ease of trade by removing and not imposing unnecessarily stiff trade barriers.

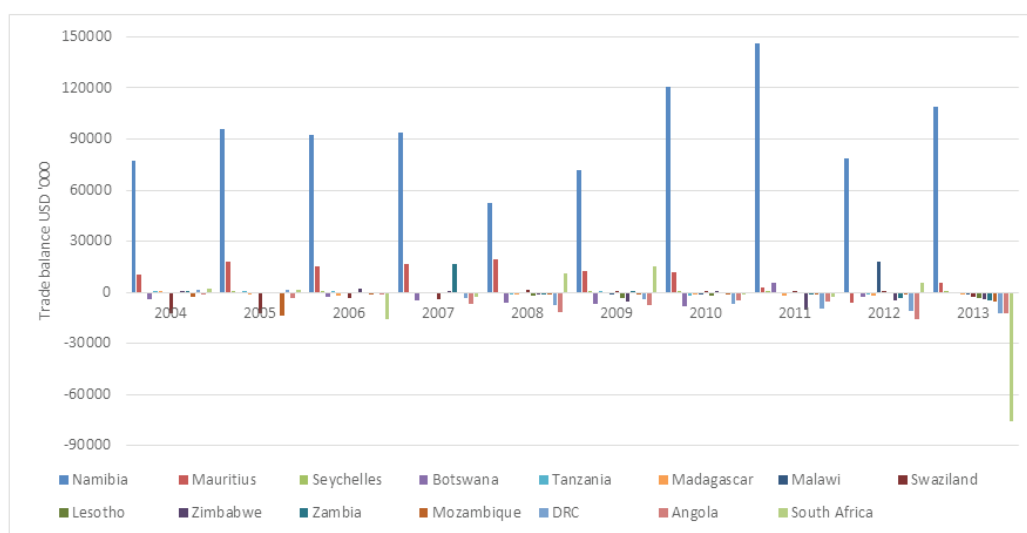


Figure 3.10 Net trade of live animals¹ for 15 southern Africa states (2004 – 2013; International Trade Centre, 2014)

¹Animals = lives horses, asses, mules, hinnies, bovine, swine, sheep, goats and poultry (International Trade Centre, 2014)

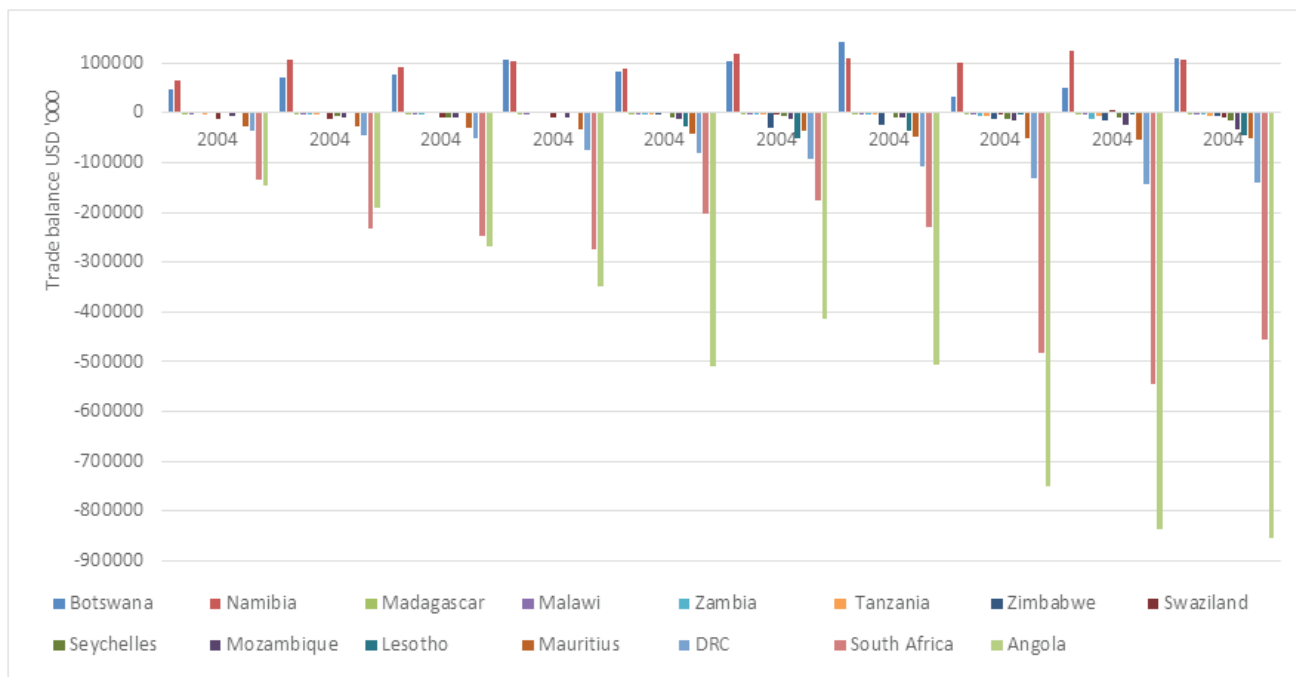


Figure 3.11 Trade balance of meat and edible offal² for 15 southern Africa states (2004 – 2013; International Trade Centre, 2014)

²Meat and edible offal = fresh, chilled or frozen bovine, swine, ovine, caprine, equine, swine and poultry meat, edible offal of red meat, edible offal of poultry, pig and poultry fat

4. MAPPING OF REGIONAL FARMER ORGANISATIONS IN SOUTHERN AFRICA AND THEIR EVOLUTION OVER THE LAST 10 YEARS

4.1 Evolution of farmer organisations

The farmer organisation that were consulted in the region are listed in the Table 4.1. Other than the organisation of the established commercial farmers (CFU, AgriSA and NAU and their affiliates) and the Zimbabwe Farmers' Union (ZFU), the vast majority of the farmer organisations were young, having been established from the mid-1990s to recent years (Figure 4.1).

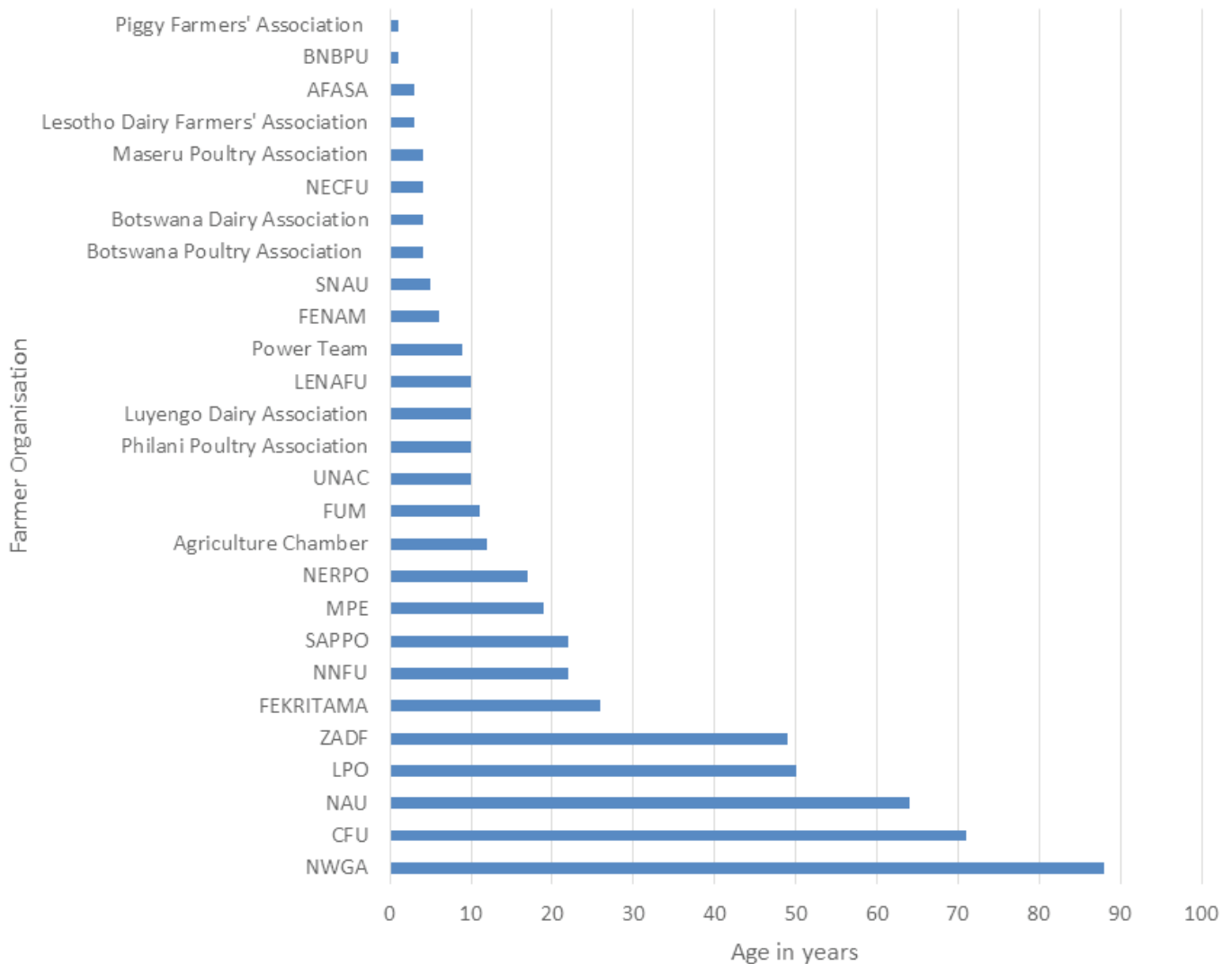


Figure 4.1 Ages of the farmer organisations that were consulted

The average age was 23 years but the median was 10 years, because of the large range from a year old to 110 year old organisations, with most falling on the younger side.

The advantage of this mix of organisations is that they tend to complement each other; the younger ones which were established within the transformation years of the region tend to enjoy favourable political recognition while the older ones are well-resourced and capacitated to carry out their functions but may be associated with the colonial history of their countries. As such in countries such as South Africa, Namibia and Zimbabwe, the unions have developed working relations that allow them to optimise their strengths, such as ASUF in South Africa, ZFAT in Zimbabwe and the Joint Presidency Committee of Namibia (made up of the Presidents of NAU, NECFU and NNFU). SACAU also provides the unions a platform for working together and learning from each other at regional level.

The reasons for the predominance of young farmer organisations are:

- Most countries had regulated agricultural systems with control boards. With the introduction of the economic structural adjustment programmes and liberalisation of the economies, farmers lost the guaranteed markets that prevailed under the controlled environments and hence saw a need to be organised, predominately for access to production support and markets.
- Autocratic government system in some countries were generally not conducive for farmer collective action, and hence the formation of farmer organisations commenced after the demise/relaxation of such governments.
- The majority of producers were smallholder farmers with an inclination to subsistence-oriented production. With the low levels of productivity that are achieved in such systems, farmers generally had limited issues to collectively lobby and hence no compelling reason to come together.
- Botswana farmers especially mentioned the growth of the retail sector from a few scattered shop in 1994 to large retail and fast food outlets that require large volumes, and hence creating space for better organised value chains that could supply large volumes of the required products, such as poultry and milk.
- There were instances where it was highlighted that communities did not have the culture of collaborating around business initiatives. For example in one instance it was said that community members can share a cigarette, drink from the same beer pot but cannot do business together. It was also said that community members trusted initiatives brought in by outsiders but were suspicious of those suggested by members of their own community; they viewed such initiators as having ulterior motives.
- Support from national governments to strengthen the representation of under-represented sectors/groups. For example, SNAU was established following an agricultural summit that was convened by the government, out of which one of the resolutions was to establish a national farmers' union. Following that decision, the government supported the establishment of SNAU from local through to national level. In South Africa, the Department of Agriculture, Forestry and Fisheries (DAFF) facilitated a project on capacity building of smallholder farmers for lobbying and advocacy. The project was intended to strengthen the then only smallholder farmers' union, NAFU-SA whose leadership had weakened linkages with members over its 19 years of existence. After an extensive farmer and stakeholder consultative process spanning from local municipality through to national level, a new association, AFASA was established in 2011.
- Governments may also promote the development of farmer organisations through its programmes for strengthening fledgling industries (e.g. the paltry associations AMA, PIAM and BPA), such as subsidised finance and protectionist policies that favour the growth of local industries (e.g. Text Boxes 1 and 2).

Text Box 1. Founding and Growth of AMA (Mozambique Aviculture Association)

In 2004, 65% of the frozen chicken in Mozambique was imported from Brazil. TechnoServe intervened by conducting a study of the industry, which showed that much of the chicken consumed in Mozambique was imported illegally from Brazil. The challenge was to develop a competitive local industry that could sell chickens at a better price than the Brazilian imports. TechnoServe funded a programme that brought together a wide range of partners, both public and private, to strengthen the Mozambican poultry industry. One of the first steps was to facilitate the establishment of a national poultry association, which resulted in the formation of AMA.

TechnoServe worked with AMA to recommend import requirements that would protect the health and safety of Mozambicans but not constitute unfair trade restrictions. The Mozambican government implemented those recommendations. AMA also launched a popular advertising campaign that promoted the benefits of buying domestic poultry. These measures helped local producers to capture a greater share of the Mozambican market.

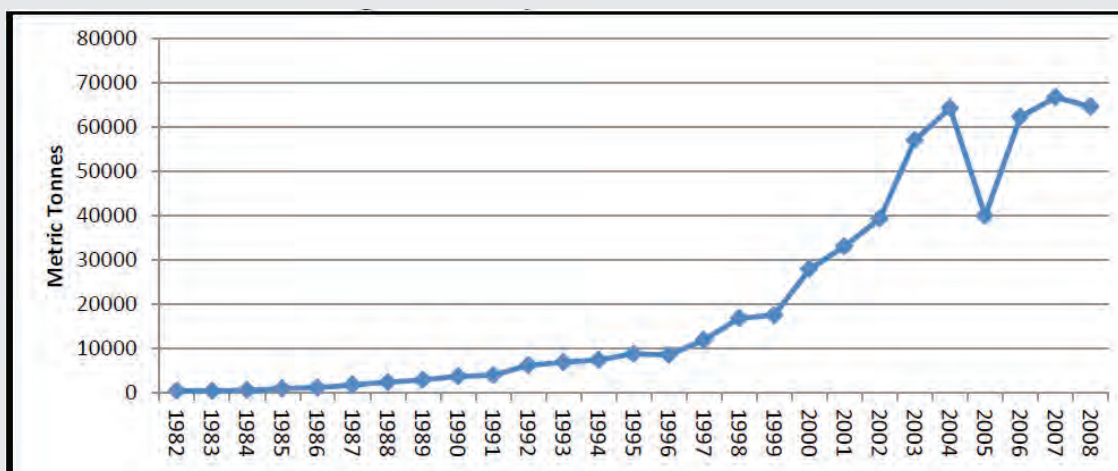
Meanwhile TechnoServe promoted training to help the industry function more efficiently, expansion of production capacity and improvement of the quality of chickens. It also facilitated the development of the feed grains sector, resulting in tens of thousands of small-scale maize and soya farmers growing more crops to supply the expanded market.

Through a matching grant programme TechnoServe further helped strengthen the public veterinary service, contributing to improved animal health and a safer food supply, and encouraged producers to make investments in bio-security.

As a result of all the interventions, the Mozambican poultry industry grew from a US\$25 million industry in 2005 to US\$160 million in 2009. It created more than 90,000 jobs, including tens of thousands of small-scale farmers. The local

Text Box 2. Growth of the Poultry Industry in Botswana

The poultry industry is Botswana's most successful import substituting sector and the government is quite rightly proud of the achievement of reaching national self-sufficiency in poultry products. National self-sufficiency has been achieved through various investment support programs over the years, such as i) the Poultry Agricultural Management Association (PAMA, 1980 - 990), whose functions were to collect, buy, grade process and market poultry products for producers as well as provide feed and day old chicks to the producers. ii) Financial Assistance Policy (FAP, 1982 - 2000), which provided considerable subsidies to both local and foreign investors to establish or expand poultry operations in Botswana, iii) the Citizen Entrepreneurial Development Agency (CEDA, from 2001) established to provide financial and technical support for business development with a view to promote viable and sustainable citizen owned business enterprises, and iv) protection from foreign competition through restrictions of imports through the Control of Goods (Importation of Eggs and Poultry Meat) Regulations [SI 120, 1979, 7th December, 1979]. As a result of the subsidies and support the industry grew as shown in the figure below:



Source: Grynberg & Motswapong, 2011.

Table 4.1 The farmer organisations that were actually consulted during the study

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
Lesotho	Lesotho National Farmers' Union (LENAFU)	<ul style="list-style-type: none"> - An apex national union made up of district farmers' associations, national commodity associations and individual farmers. - Led by professional from the livestock sector. - Strongest members are the Lesotho Wool & Mohair Growers' Association (LWMGA) who have funding and virtually manage their own affairs. - Aware of problems in the dairy sector. - Piggery and poultry don't have funding and so are weak - Led launch of CAADP in Lesotho - Were part of the founding of the Policy Hub and feel it is timely for dealing with the PVS report. - Suggest that AU-IBAR releases funding the Policy Hub to enable interaction amongst sector role players. - Member of SACAU 	Founded in 2004 and registered in 2008
	Lesotho Dairy Farmers' Association	<ul style="list-style-type: none"> - A national association made up of 10 district dairy associations. Their main aim is to facilitate market access and fair prices for local producers. - Members have 2 -10 cows; average production = 15l/day - Wish to see Lesotho National Dairy Board turned around to be more transparent, include farmer representation, and run according to its constitution. 	2011

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Want less dependency on imports from South Africa, which are >10 000l/day - Want better price for local producers (currently R3.68) - Not members of LENAUFU 	
	Piggy Farmers' Association	<ul style="list-style-type: none"> - A national association of over 100 pig farmers from 10 districts. - Each have an average of 3 sows - Main aim is to access the market of 3 000 pig carcasses/week imported from South Africa - Need land for production, standardised pig sties, more sows to improved breeds and are lobbying for the construction of a pig abattoir in Lesotho. 	2012
	Maseru Poultry Association	<ul style="list-style-type: none"> - A district association of 60 poultry producers (broilers, ducks, eggs) in the district. - Established after the dissolution of Lesotho Poultry Association. - One of main aims is to regain the use of poultry products collection depots which were established in the 1970s and have since been disused or turned into shops and taverns. - Not members of LENAUFU 	2010
Swaziland	Swaziland National Agricultural Union (SNAU)	<ul style="list-style-type: none"> - A national union consisting of regional associations and national commodity associations. Its establishment was facilitated by government - Have challenge in keeping in touch with members at grassroots level; depend of regional organisations to pay member fees (R10,000 per region). - Main commodities are vegetables, piggery, feedlot beef and cotton (no grains). - Pig farmers were better organised at regional than at national level. - Poultry producers were not organised. Government intervened with a fund to develop poultry production but weak poultry facilities were erected, much of the money paid the millers and there were allegations of misuse of funds. - Have website, annual report. Communicate with members through structures; i.e. national Board meeting feeding into regional, and development area meetings. - Some disconnection between SNAU and government. SNAU meet with parliament, portfolio committee but believe there is no political will to improve agriculture, and that extension officers compete with them for farmer attention. - Their impression is that CAADP is a "white elephant" - Have a few funded projects for members (e.g. IFAD and EU funding for capacity through SACAU, Chinese funded loan scheme for improving maize production. 	2009

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Beef feedlotter have reduced from 332 members in 2006, feeding about 20 cattle each to 13 feeding about 3 cattle each. - Feed is a great challenge; maize prices escalate every 3 months. Suggest that government reduces levies on imports and stimulates local production 	
	Power Team	<ul style="list-style-type: none"> - An association of 55 feedlotter who finish off cattle for sell mainly to Swazi Meat Industries, which supplies the local and export markets (see § 5.2.7). Peak membership was 160. - Each feeds 5 – 15 cows; highest is 30 cows (see Text Box 5). - Worst challenge is cost of feeding at R20 to R22/day with a feed conversion ratio of 7.5kg. - Recommended solutions were to provide commercial cattle farmers with farms, improve herd management for all farmers, and improve calving percentage from current estimate of 35%. Government to should establish demonstration farms for feedlotting. 	2003
	Luyengo Dairy Farmers' Association	<ul style="list-style-type: none"> - An association of dairy producers in Luyengo, a town about 35km from Mbabane. Its main activities are collection and retail of milk from members. Has 15 members, average of 6 cows; produce 12l/day. - Swazi Dairy Board assists them with AI and provided bulking tank - Farmers use indigenous grasses + supplement for feed and herds are predominately Jersey. - Famers walk to collection centre. The centre buys milk at R5, sells at R7 to individual buyers and R6.50 to retailers (who sell the milk at R7). In contrast large processors' farm gate price is R4.80. - Challenges: - need pasteurisation and packaging, no finance for livestock peepers, no national association of dairy producers for bargaining at national level. - Prefer an organisation of likeminded farmer (dairy only) and not too many sectors in one organisation. 	2004
	Philani Poultry Association	<ul style="list-style-type: none"> - An association of 70 (10 active) poultry producers in Hhohho region, established to facilitate input and output markets for members. - Input supplies and output markets were assured before deregulation (Philani produced 5 000 chickens/ week and now produce 3 000 chickens/ month. - Current challenges: - access to packaging material, markets and escalating feed prices). - Had extension support before deregulation but now supported by suppliers of feed and day old chicks. - Recommendations: owning centres through which they can collectively buy packaging material, slaughter, store and sell chicken; training of new and once inactive producers. 	2004 (after deregulation)

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Not members of SNAU (have impression that it represents vegetable farmers and producers of indigenous chicken but not commercial poultry). 	
	Safika Piggery (Private Company)	<ul style="list-style-type: none"> - Company owned by two with 8 employees. - Have a farm with 50 sows and produce 20 – 25 pigs/ week and slaughter at own abattoir. Own abattoir performs better than municipal abattoirs (the latter prefer to slaughter cattle; no good service for pigs) - Challenge is that there is no proactive lobbying by producers; they react to government policies. E.g. VAT on producers with turnover of >R500,000 restricts growth and encourages small-scale production. - Pig farmers not yet organised into strong association with persuasive lobbying voice. 	2007
Namibia	Namibia Agricultural Union (NAU)	<ul style="list-style-type: none"> - A union consisting of 70 farmers' associations throughout the country, whose mission is to promote/enhance a conducive environment for sustainable agriculture. - Livestock Producers Organisation (LPO) represents cattle and small stock producers in NAU. - Have good working relations with the Ministry of Agriculture (can easily get appointments and ministry listens to them). - Also have good relations with other industry role players (e.g. MeatCo, Meat Board, Abattoirs Association, Livestock Agency, Brokers and Transporters Association- LABTA,). - Main issues: - maintenance of clean animal health status, FMD free status south of the codon fence, (Union contributes to surveillance of the fence), maintaining current markets and developing new ones; finalisation of the Economic Partnership Agreement with the EU. - Recommendations: - have one union in Namibia but membership fees would be a bottleneck; use existing forums (Joint Presidency Forum, Livestock Producers' Forum) because they work well; support commodity based trade; extension of the Farmer Support Programme (for training and mentoring emerging farmers). - Funding sources: membership fees (2,500 members@ R2,400), levies (20% of levies collected – other 20% to NNFU and 60% to Meat Board) and office space lease fees 	1950
	Livestock Producers' Organisation	An association of large and small stock producers in Namibia, which is a member of NAU and whose mission is to promote a favourable production environment for its members in order for them to produce high quality meat under natural conditions, free of any residues etc. They work with NAU as indicated above.	1963

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
	Namibia Emerging Commercial Farmers' Union (NECFU)	<p>A union of smallholder farmers, predominately those who acquired land through the land reform process. Their mission is lobbying and advocacy to help farmers address profitability issues and monopolistic practices in market access, protect and enhance the economic well-being and quality of life of emerging farmers, including ranchers and rural communities.</p> <ul style="list-style-type: none"> - Main challenges of members are access to capital, lack of expertise in farming poor infrastructure on farmers, access of information on market and market requirements, traditional mentality to livestock farming, lack of knowledge about commercial farming, stock theft by workers, and ignorance of basic labour laws. - Challenges are addressed through information sharing in the Livestock Producers; Forum, quarterly meetings at national and regional level, information from extension officers. - Efforts are curtailed by lack of funding (members reluctant to pay membership fees of R2,700 per region). - Not getting a share of the levies but have some sponsorship from GIZ. - Have office space and financial constraints - Not a member of SACAU. 	2010
	Namibia National Farmers' Union (NNFU)	<ul style="list-style-type: none"> - A national Federation of 14 Regional Farmers Unions, of which each Union has their affiliates Local Farmers Association of about over 70 members associations, individual communal or smallholder's farmers. - Have good networking in livestock sector (i.e. Meat board, Meatco, Agra, some commercial banks, Abattoir Associations, Livestock marketing agents) - Min services are provision of information, sector representation, and provision of finance - Have represented farmers successfully at various policies formulations platform, convinced farmers to adhere to local/regional and international standards and requirements for livestock marketing and animal health issues, managed to portray a good image of the sector - Has capacity to handle a number of issues and projects at national level but this is limited at regional and local level. - Funding is from levies and membership fees. 	1992
<u>Botswana</u>	Botswana Poultry Association (BPA)	<p>A self-funded association of poultry industry that does lobbying, advocacy, liaison and training for the industry.</p> <ul style="list-style-type: none"> - Main development activity is training around the country for current and prospective producers (many producers entered sector through FAP and CEDA funding, see Text Box 2, P.32). 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Poultry industry grew from about 1kg/person/year in 1994/95 to about 30kg/person/year currently (~P1 billion). - Challenges – high feed costs (maize and soya), limited veterinary support (Botswana veterinarians are oriented to cattle production), cattle post farmers – most farmers leave their poultry to go to the cattle posts on weekends and suffer high losses, delays in cross border movement in/out of South Africa, specialised products (e.g.1.2-1.3kg chicken for Nandos, and 1.55 – 1.65 kg for KFC; high demand for wings; demand chickens farming using indigenous micro-organisms), halaal slaughter) - Challenges have been addressed through good relations with government (work together to organise training workshop), have good working relations with Poultry Liaison Committee (all role players discuss and resolve matters together with government chairing the meetings), have established breeding operations in Botswana; now self-sufficient in day old chicks), government has come up with an initiative to construct poultry abattoirs, compartments between South Africa and Botswana are working well 	
	Botswana Dairy Association (BDA)	<p>A self-funded association of the dairy that does lobbying, advocacy and liaison for the industry</p> <ul style="list-style-type: none"> - Used to produce 10 million l/ year, now down to less than 2 million l/year and target is 20-30 million l/year. - Challenges are accessing permits for importation of breeds and feed from South Africa (costly and long bureaucratic processes at the border), high cost of feed, South Africa's loss of FMD free status inhibited feed and livestock imports into Botswana, - Challenges have been addressed by lobbying government for land and assistance to produce feed locally(done a feasibility study for feed production), to simplify import processes at border posts, allow imports through more border posts, cooperation between producers and local processors.They have not yet been overcome. 	
	Botswana National Beef Producers' Union (BNBPU)	<p>A union made up of regional beef producer associations. One of the major activities has been lobbying for amendment of the Botswana Meat Commission Act to abolish the monopoly of Botswana Meat Commission over slaughter and marketing of beef. It is funded from cattle levies (P2/animal).</p> <ul style="list-style-type: none"> - Challenges: measles (3-20% as a result of poor toilet facilities in the villages), South Africa's FMD status (dependent on South Africa for bulls and heifers), too much bureaucracy in the marketing of cattle (especially in checking identification with bolus), predation by wildlife (especially lions), poor roads 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		(it can take 2 hrs. to drive on 45 km of dirt road), veldt fire, limited land compounded by misuse of land, old BMC abattoirs now a liability – closes for up to 3 months and has high maintenance costs.	
Zimbabwe	Zimbabwe Farmers' Union (ZFU)	<p>Have a large secretariat of about 100 staff members attending to operations of the union at ward, district and provincial levels (~60 persons), economics, marketing and commodities, provision of information to farmers (through newsletters, magazines, media liaison, social media, etc.), capacity building (training and extension).</p> <ul style="list-style-type: none"> - Funded from membership fees (US\$2 for small-scale, US\$5 medium scale, and US\$10 for large scale farmers) collected at point of sell, levies and projects by donor agents (e.g. EU, FAO, USAID, Swedish Cooperative Centre, SACAU), own assets - In the process of organising farmers into commodity associations, including livestock farmers in 4 provinces. - Represent their constituents in LMAC, Agriculture Information Forum, meetings of livestock associations and Livestock Working Group (established by FAO). - Encouraging use of study circles at grassroots level (have a project as ZFAT for that purpose). - Promoting feedlots in Matabeleland (see Text Box 4). - Require strengthening in state budget analysis, policy analysis (especially livestock issues), and climate change. 	Zimbabwe National Farmers' Union (1941) + National Farmers' Association of Zimbabwe (1981) = ZFU (1992)
	Commercial Farmers' Union (CFU)	<p>An independent and politically neutral membership driven organisation which represents and advances the interests of professional farmers in Zimbabwe and elsewhere in Africa. CFU draws its membership primarily from large scale and Intensive Commercial Agricultural Producers, but membership is open to all farmers regardless of scale or land holding. Its main agenda is to promote a stable and competitive agricultural business environment; and to provide advice and support to farmers - covering matters such as technical extension service, inputs, marketing aspects, business management, labour relations, land and compensation.</p> <ul style="list-style-type: none"> - Lost many of its commodity associations (ZADF, poultry, pig producers. Cattle producers no longer organised). - Deals with cross cutting livestock issues. - Attend LMAC on behalf of livestock. - Major issues are economic melt down, poor liquidity in the country (reduced sales of livestock products), high cost of production, national investment policy. - The livestock specific issues were veldt fires, theft of fences, disease outbreaks & lack of disease control, cost of compliance (see Tables 4.3 – 4.5). - Part of the joint Presidents' Council (made up of presidents of ZFU, ZCFU, CFU and ZNFU). 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Funding is from membership fees (US\$800/year and US\$1,500 for bigger companies) - In the process of applying for SACAU membership 	
	Zimbabwe Commercial Farmers' Union (ZCFU)	<p>A union that was established by large scale indigenous commercial farmers who entered commercial farming after independence.</p> <p>It was established as the Indigenous Commercial Farmers' Union.</p> <ul style="list-style-type: none"> - Major sector challenges are institutional capacity not as strong as when CFU was still strong, no mechanism for collecting levies, and hence no abattoirs, dips and auction pens that were built from those levies; former CSC abattoirs now run as private entities; buyers dictate prices; free cattle movement (spread of diseases and ticks); - Union has commodities chairs from district to national level - Activities of farmers limited by lack of funding. Union has come up with an insurance scheme (working with an insurance company), which can be used as collateral: 	1996
	Zimbabwe Association of Dairy Farmers (ZADF)	<p>An association of dairy farmers established as the National Association of Dairy Farmers in 1965 and changed to ZADF after breaking away from CFU. The aims and objectives of ZADF are to promote, advance and develop the production of milk and dairy products in Zimbabwe and to advance and protect the interests of all sections and categories of producers and by so doing play a pivotal anchor role in the dairy industry in Zimbabwe.</p> <ul style="list-style-type: none"> - Has about 110 members (medium to large scale (from 400 members in the past) - Sources of income are levies (cover overhead costs) & donor funds (cover member services) & farmer licence. - Challenges are dwindling dairy herd, limited funding, potential to produce 150 million/year (200 million with good fodder production) but only produced 54.7 million in 2013, need a platform for coordinated development, high cost of production - Association has revolving funds for purchasing dairy cattle for small-scale farmers (donor funded). Processors have established a similar scheme for large scale farmers to buy cattle from South Africa - Have good relations with Dairy Services (in Government), and departments of veterinary services and livestock production in government - Liaise directly with LMAC and working with them on cost of production models - Also part of Livestock Working Group (established by FAO) and would prefer establishment of a Dairy Working Group. 	1965

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Members of Zimbabwe Dairy Development Trust (Industry + government representatives) - Members of ESADA, which has good conferences but not a strong platform for resolving issues (could work better if it was just southern Africa and not 2 regions in one). - Capacity needs are for evidence based lobbying, systems monitoring and evaluation; in house cost of production modelling, independent laboratory (Dairy Services tries to keep up with analysis but has poor logistical and human capacity). - Success include open door policy with the Minister of Agriculture (helped survive the economic meltdown) - The ZDIT has remained intact even through the difficult times. 	
<u>Malawi</u>	Central Region Milk Producers' Association of Malawi (CREMPA)	<p>A regional structure of the Malawi Milk Producers' Association, which provides technical supports to its Milk Bulking Groups.</p> <ul style="list-style-type: none"> - Has no advocacy person, deals with technical matters. - Biggest member has 275 cows, and produce an average of 10-12l/day. Members have about 2 cows each. - Challenges: - one buyer, and hence price is low; lack feed production knowledge and skills; feed flow is poor; Bulking tanks are outdated. - Deals with price challenge by monitoring milk production costs and negotiating for better prices (see Text Box 3). - MMPA assists with lobbying for pricing and production matters. - FUM has sought funding for new equipment - Have good relations with the government Department of Animal Health - Milk quality tested every day and records checked by Malawi Bureau of Standards - Capacity required: - advocacy, enough Animal Veterinary Officers who specialise in dairy, farmer training (e.g. in AI, feed production, feed flow management); more cows for members who do not have any (currently have a cow pass-on scheme) - Breeding stock is obtained from government farms as well as commercial producers. 	
	Farmers' Union of Malawi (FUM)	<ul style="list-style-type: none"> - Has just revised its structure and strategy in 2013. - Now has a Council of the 28 Districts + representatives of Commodity Associations+ representatives of agribusiness. - Have a board, drawn from the Council, with sub committees for Policy and advocacy, agribusiness & marketing, management and institutional development and investment (specialists are co-opted into these sub-committees). 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - 90% donor funded (USAD, Agra, SACAU, DFID, Flounders, Irish Aid, Swedish Cooperative Centre, SACAU). - Membership fees: - smallholder K25 000, medium K50 000, large scale K175 000 - Achievement: - have assisted farmers to form cooperatives, district structures & links to markets (e, g. set up cotton association); part of CAADP team(signed compact & now working on investment plan with government); part of Sector Review team and have recommended that the Farmer Support Investment Programme should be profitable and now monitors it (e.g. FISP buys seed at K125/kg and sells it at K80/kg); discourage heavy subsidies - Beef: - most of cattle (1.2 million) in the South; have a 1.2% annual decline in weight; now establishing national livestock association with assistance of SACAU. - Poultry value chain is dominated by big cooperates who control the value chain and squeeze out smaller, local producers (matter for competition commission) - Dairy: - used to import powdered milk, reconstitute it and sell. Now there's an import duty on powdered milk which has allowed growth of dairy industries. - Need to build capacity for policy research. 	
	Poultry Industry Association of Malawi (PIAM)	<ul style="list-style-type: none"> - An association representing the interests of role-players in the poultry industry of Malawi. - Members: - open farmers = 0 -500 chicks/week; medium = 500 – 10,000 chicks/week; commercial = >10,000 chicks per week (45 farmers) - Issues addressed: - dispensation of import of breeding stock (import 20%); restrictions on export of soya (consume about 7 000t of soya and have managed to restrict exports to 1 600t) in order not to deplete supplies for local market; conducted feasibility study for rural abattoirs to enable integration of smallholder farmers into value chain; - Funding: - levy on day old chicks and feed - Need to strengthen smallholder sector (e.g. Agricultural Inputs Traders Association have purchased feed mixing equipment for smallholder sector); explaining fair trade to farmers and assisting them to understand the industry. 	1992 and registered in 1994
<u>Madagascar</u>	Agriculture Chamber	<ul style="list-style-type: none"> - Apex body of agricultural organisations in Madagascar that was established by a decree. Its membership includes the 5 major agricultural unions (FEKRITAMA, Koloharena, FIFATA, CPM and Réseau-SOA) and individual members. - Livestock activities: - lobby for combat of stock theft; advocate for appointment of para vets to improve disease control; lobby for restrictions of meat imports from Brazil; increased budget for 	2002

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - ministry of livestock as per CAADP objectives and guidelines. Promote Farmer Field Schools and host annual regional & national agricultural show for the whole sector; encourage farmers to form associations and cooperatives. - Have no agricultural data (its with the associations). - Have no membership fees but intend to introduce a credit card for farmers through which they'll charge a fee. 	
	FEKRITAMA	<ul style="list-style-type: none"> - A Federation of 9 role-players in agriculture (rice, dairy and livestock producers, export, food security, young farmers, women and cooperatives). - Major objectives are providing training & information, capacity building and environmental protection. - Membership fee is 2,000Ar, which is split across the 4 levels of the structure. - Have partnered with SACAU and development agencies such as SCC and IFAD to organise and train farmers. - Livestock federation = FMM. Need technical support, and to be able to assist members with disease control - Capacity building need: - strengthen of organisation, strengthen FMM to support livestock farmers 	
	Malagasy Professionels d'Elevage (MPE)	<ul style="list-style-type: none"> - Aim is capacity building of members who are small livestock producers (i.e. poultry, small ruminants, pigs, bees and aquaculture) and linkage with up and down stream service providers. - Has 550 members producing eggs (300 – 10,000 layers/ farmer), broilers (100 – 2000 per week), water fowl, extensive small ruminants (5 – 30/flock), bees, aquaculture, pigs (15 – 800 per herd). - Main services are capacity building (encourage members to produce for the market, foster relations between producers and other value chain actors, encourage cooperatives), feed formulation, monitoring, training of members, promotion (e.g. organise a fair every 2 years), promote local production and dissuade imports - Financed through membership fees (10,00Ar / year) + payment for services - Main issues: - high tax on farmers (negotiating with Minister of Finance for tax reduction), encourage farmers to have formal associations. - Works along or with Agriculture Chamber - Need to strengthen capacity to deal with financial partners and improve negotiation skills. - Have little linkages outside Madagascar and in the southern African region. - 5 members were interviewed and they used the association for training, lobbying for +tax reductions, seeking sources of funding, seek new markets and fight imports. 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
	Beekeepers' Association (Fédération Nationale des Apiculteurs Malagasy; FENAM)	<p>The association was established to protect the interests of beekeepers, especially against middlemen who would exploit them in the honey trade to international market. Members are associations in 9 regions of Madagascar.</p> <ul style="list-style-type: none"> - One regional association pays 10 000Ar registration fees + 15 000Ar annual membership fees. - Services include collecting members' needs and provide solutions through training, information dissemination (telephone, sms, internet, email), collaboration with other institutions to develop honey production, capacity building of member organisations. - Country produces about 4 000t/annum and local consumption is about 500t; exports 3 000t to Mauritius - Production was affected by varroosis outbreak in 2010. (e.g. one regional association of 117 members dropped from 8.5t/annum before infection to 2.5t/annum) - Achievements: -1997 embargo on honey exports to EU lifted in 2012, and exports resumed in 2013; curbing varroosis in collaboration with the Department of Veterinary Services and Ministry of Research; convincing members to use traceability - Members of Réseau-SOA and work well with Ministry of Livestock. - Support projects include IFAD (PROSPERE project), APFLODEV - Capacity needs include technical information produced for Madagascar environment, increasing income from exports (find alternative markets in Africa and Asia), improve quality and quality of honey. 	Established in 2008, registered in 2010.
Mozambique	UNAC	<ul style="list-style-type: none"> - An organisation that focuses on agrarian issues and whose main mission is to fight for the active participation of farmers in Mozambique's development process - Have limited direct involvement in commodity specific issues. 	Established in 1987 and registered in 1994
	AMA (Mozambican Aviculture Association)	An industry association established through the facilitation of TechnoServe, whose primary aim was to build up domestic poultry production and make the local poultry industry competitive in the face of cheap imports from Brazil (see Text Box 1).	2004
South Africa	AgriSA	<ul style="list-style-type: none"> - A federation of agricultural organisations that consists of nine provincial and 24 commodity organisations. Its mission is to promote, on behalf of its members, the development, profitability, stability and sustainability of commercial agriculture in South Africa by means of its involvement and input on national and international policy. - Ordinarily member commodity organisations deal with industry specific issues 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - AgriSA intervenes in cross-cutting issue (including issues of trade). - Examples of trading partnerships that are dealt with include Regional Agricultural Policy (SADC), Free Trade Agreement of SADC, Economic Partnership Agreement (EPA) for SADC, MERCUSA, Venezuela, India, European Free Trade Agreement (EFTA), Chin and COMESA. - Support the concept of a regional platform for livestock to deal with the multiple cross-border trade issues. 	
	African Farmers' Association of South Africa (AFASA)	<p>A national association of smallholder farmers established to facilitate the development of African farmers in order to increase their meaningful participation in the agricultural sector, in order that they become competent and successful commercial African farmers of South Africa. Its membership includes individual farmers, commodity associations and cooperatives</p> <ul style="list-style-type: none"> - Main activities since its establishment have been organisational development. - AFASA has had much input into current land reform policies coming out of the green paper of 2011. - Sits in committees to review government programmes as well as part of the CEO Forum and Agri-Sector Unity Forum. - NERPO is the livestock commodity associated with AFASA 	Established and registered in 2011
	National Emergent Red Meat Producers' Organisation (NERPO).	<p>A national association of smallholder cattle, sheep and goat farmers, established to facilitate the empowerment of its members in order to improve their social and economic well-being and to enable them to utilise market opportunities on a sustainable basis. The goals is that the members should be successful commercial livestock farmers</p> <ul style="list-style-type: none"> - Main functions are lobbying and advocacy, facilitating access to technical information, markets and finance. - Lobbying & advocacy: - participate in many forums established by the industry (e.g. National Animal Health Forum, Red Meat Industry Forum, Livestock Welfare Coordinating Committee, Stock Theft Forum, Predation Forum, Red Meat Research & Development) and also do direct lobbying for support for developing farmers (e.g. the establishment of the credit facilities which are government financed and NERPO is an on-lender). - Most effective projects are farmer training and mentorship (focusing on entrepreneurship) and provision of credit facilities for the purchase of livestock, machinery and infrastructure. - Current drive is aggregation in procurement of inputs access to output markets. 	

Country	Farmer Organisation	Brief description and key points from discussions	Year Established
		<ul style="list-style-type: none"> - Current issues: - establishment of producer cooperatives for access to markets, driving the development of a livestock sector investment plan, strengthening communication with members and stakeholders, increased protection of the red meat industry (re: import controls, strengthening of borders and national disease control and management)) - Capacity needs: - information for evidenced based lobbying, more funding for farmer support programmes. - Provides Secretariat to AFASA 	
	National Woolgrowers' Organisation (NWGA)	<p>A national association of commercial and communal wool sheep farmers in South Africa established with the purpose of collectively representing the wool farmers and to integrate the development requirements of the sector. Its mission is to promote profitable and sustainable wool sheep production.</p> <ul style="list-style-type: none"> - Have facilitated growth of wool production in the smallholder sector from R1.5 million in 1997/8 to R131.8 million in 2012/13 (see also Figure 4.2). - Members of AgriSA - Suggest more coordinated approach for lobbying for the livestock sector and not split across a number of unions. 	1926
	South African Pork Producers' Association (SAPPO)	<p>SAPPO serves the South African pork producer by participating and co-operating within the organised agricultural fraternity. SAPPO also liaises with various sectoral organisations, role-players within the supply chain of the meat industry, the government and international interest groups on behalf of pork producers.</p> <ul style="list-style-type: none"> - Believe that pig production will not grow much in the sub-continent because of the challenge with African swine fever (endemic in the warthog), high infrastructure requirements and high input costs. - Suggest that control boards should be re-introduced to provide conducive room for the growth of local agricultural industries. - Suggested that the animal health forum should be strengthened at provincial level as will enable the provinces and industry to deal with disease situations jointly. - Recommended further research on more affordable feed resources, - Members of AgriSA who handle cross cutting issues on behalf of the association (including matters of compensation and environmental issues). - Believe that keeping the associations identity is important. 	

4.1.1 Approaches used to support the young organisations

During the consultations, a number of approaches were employed to develop producer organisations, and these were centred on improving production and cooperation amongst producers as well as with their stakeholders. The approaches included training such as was provided by Heifer International in Malawi. The communities were trained to work together in producer groups such as clubs, milk bulking groups and cooperatives. The training included mobilisation of groups, leadership, dealing with group dynamics, governance of groups, empowering members to demand services that are due to them, and improving linkage to markets. Heifer International Malawi's motto for training is "what steals power is lack of skills and knowledge", and hence their approach is to equip the smallholder farmers with appropriate skills sets and knowledge to enable them to make informed decisions. According to Heifer International in Malawi, their intervention has enabled the establishment of milk bulking groups and empowered them to negotiate for better prices for milk, and establish linkages to markets that offer better prices. This type of grassroots training is perceived to have strengthened regional milk association such as CREMPA (Text Box 3); and hence the Malawi Milk Producers' Association.

Text Box 3. Central Region Milk Processors Association of Malawi (CREMPA)

CREMPA deals mainly with technical matters of milk production for its members. The association monitors the cost of production on a monthly basis and uses this information to lobby for better milk prices for producers. For example, in January 2013, the milk price was K68/l and after negotiations with Lilongwe Dairies, it went up to K80/l. At the time of interviews the price was K110/l but the producers wanted it pushed up to K150/l because their costs had gone up to K125/l. The high costs were said to be a result as a high rate of inflation.

The International Livestock Research Institute (ILRI) uses innovation platforms, consisting of representatives of farmer communities and other actors, such as local leadership, buyers, processors, researchers and local government officials. The platforms diagnose problems, identify opportunities and find ways to achieve their goals. They may design and implement activities as a platform, or coordinate activities by individual members. The engagement through the innovation platforms is iterative, through a series of meetings and actions that are facilitated by ILRI and lead up to the attainment of the goals.

Some key elements of innovation capacity include: self-organisation, learning new skills, changing mind sets, valuing others' roles in innovation, having a holistic view, being able to adapt to changing situations, creating new ideas, recognising opportunities, being proactive, using indigenous ideas, and looking to the future (Boogaard, Dror, Adekunle, Le Borgne, van Rooyen & Lundy, 2013, Text Box 4.). In contrast to the example where innovation platforms were used to achieve change in preparing cattle for the market in Zimbabwe, smallholder feedlotters in Swaziland were failing to make profit from their cattle feeding schemes because of the prohibitive cost of feeding and possibly failure to analyse and remedy the problem (Text Box 5). Their approach has been to lobby for higher market prices for their fattened cattle, when it seems that the solution would be to use cattle with better feed conversion ratios and seek more affordable feed.

Financial support and protectionist policies have worked well to develop infant industries (Text Boxes 1 and 2) but some economist caution that these might not always be sustainable in the long term. For example, in a presentation to the SACAU Livestock Conference in Maseru (26 - 28 May 2014), Ernst Janovsky advised that industries should let free market forces prevail as a pull factor.

In Madagascar there is a directorate for professionalisation in the Ministry of Livestock, which is specifically responsible for the establishment of farmer organisations from grassroots level (local associations, cooperatives, etc.) through to national structures. The directorate is also tasked with building the value chains of the various livestock commodities in partnership with the private sector and the donor community.

Text Box 4. Using innovation platforms to organise beef producers in Zimbabwe

In the 2011 dry season, livestock farmers in Gwanda faced severe feed shortages. Using information and skills they had gained from their innovation platform, the farmers began to buy feed in bulk. Local agrodealers were selling feed at USD 21–26 for a 50 kg bag. But the manufacturer in Bulawayo sold the same bag for USD 12.50. The dealers justified the high local feed prices as a consequent of the low turnover of feed.

The farmers clubbed together through the platform to buy a lorry-load of feed at a time. In October and November 2011, 250 farmers collectively bought 40 tonnes of feed worth USD 15,000. Each farmer spent an average of USD 60 on feed. By acting together, they bought the feed at a price that was more cost-effective. And they could feed their animals through the dry season. Currently, neither ICRISAT (the originator of the innovation platform) nor the platform itself is involved but farmers continue to self-organise and engage with the local private sector suppliers and traders.

Through collective action in the innovation platform, farmers understood the value of their livestock; they were able to analyse the constraints (high local prices) and resolved this through efficient problem analysis and they devised solutions by pooling resources.

Source: Boogaard et al., 2013.

Text Box 5. The case of Power Team, Swaziland

Power Team is an association of 55 local feed lotters who finish off cattle for sale to Swazi Meat Industries. They buy local cattle of about 1.5 – 2 years old, feed them and sell to Swazi Meat Industries. The biggest challenge perceived by Power Team was the low price for their finished off beef cattle; which was below the costs that they incurred to feed the livestock. It was said that it cost R20 -R22/day to feed an animal an average intake of 7.5kg /day, with a growth rate of about 1kg/ day. The feed conversion ratio (FCR) is high and the average daily gain low compared to that of the breeds that are used in the South African meat industry (see Table below). Their net profit is in the range of R200 – R250 per animal, and given that most members feed 5 – 15 animals per cycle, the gross profit is in the range of R1 000 to R3 750 per feeding cycle.

Breed type	Average Daily Gain (g)	Feed Conversion Ratio (FCR)
Bos taurus africanus	1 368	6.88
Bos taurus indicus	1 656	6.42
Bos taurus (British)	1 730	6.67
Bos taurus (dual purpose)	1 854	6.59
Bos tuarus (lean)	1 808	6.40

According to the directorate, the groups that they have most successfully organised/supported were MPE (who have poultry, pig, bees, aquaculture and small ruminant producers), FENAM and Malagasy Dairy Board (MDB).

Finally SACAU has a capacity building programme for its members which strongly focusses on governance because the leadership of the regional body strongly believe that for SACAU to have a strong lobbying voice, maintain and grow its credibility and attract funding for its many support programmes for its members, it has to prove that there are proper governance and accountability mechanisms amongst its members as well as within the regional body itself. SACAU has provided such training to many of its members, especially the newer organisations. SACAU also assists its members to establish producer organisations where they do not exist (e.g. organisation of the cattle farmers into producer organisations in Mozambique, Malawi and Zimbabwe).

4.2 Major issues of livestock producer organisations and linkage to unions

4.2.1 The major concerns for producer organisations

The major concerns of many of the smallholder farmer producer organisations were production and market of their commodities. That was because in many instances the smallholder farmers were struggling with access to inputs (such as feed, stock remedies and breeding animals) and competitive markets. Examples of some of the issues that were raised are shown in Table 5.2.

Table 4.2 Smallholder farmer concerns and possible solutions

Issue raised by farmers	Perceived solutions	Possible solutions
High feeding costs of cattle and pigs but market offers lower price (e. Power Team , Piggy Farmers' Association in Swaziland and Pig producers in Lesotho)	Markets should offer high prices taking into consideration the high feeding costs	Use of improved breed with better feed conversion ratios. Lobby for a livestock improvement policy that will enable farmers to access improved breeds locally and from imports.
High feed prices	Suppliers should provide feed at affordable prices	Reduce monopolies and heavy dependence on imported feeds. Promote local feed production.
Poor linkage to markets (e.g. pork, poultry and fresh milk in Lesotho, poultry and fresh milk in Swaziland, fresh milk in Madagascar and Malawi)	Government should facilitate linkage to markets; e.g. by resuscitating the old collection points for poultry in Lesotho and Swaziland, restricting imports and enforcing milk from local producers in Lesotho, providing infrastructure and access to improved milking cows in Madagascar.	Seek infrastructure and equipment to allow linkage to markets (e.g. milk bulking centres with bulk cooling tanks). Improve productivity and quality in order to attract buyers. Check the competitiveness of the industry and if need be seek support through measures of protection from government (e.g. implementation of anti-dumping regulations).
No processing facilities (e.g. abattoirs for pigs and beef in Lesotho; pasteurisation for milk in Swaziland and Madagascar)	Government should build an abattoirs and provide milk processing facilities.	Do market research for such facilities and use as basis for argument for new facilities. Improve productivity and quality in order to justify such facilities.
Diseases (e.g. in Pig production in Mozambique and Lesotho)	In Mozambique, African Swine Fever has discouraged pig production; pork supply is dominated by imports from South Africa. Farmers in Lesotho feel they need their own veterinarian to look after their pigs' health	Implementation of a stamp out policy; increase biosecurity; regulate imports.
Land for the construction of pig sties (pig producers in Lesotho); loss of grazing land to sugar cane (Swaziland)	Government to allocate land for the construction of pig sties (Lesotho); Government does not know how to help with the land issue (Swaziland)	Lobby government authorities for designation of land use and policies for transparent land allocation.

On the other hand, organisations that consisted mainly of established commercial farmers (e.g. Livestock Producers' Organisation of Namibia, ZADF and producer associations in Botswana and South Africa) were not only concerned about access to production inputs and markets but were also aware of what policies and legislation impacted on their access to such services, and hence needed amendment. For example, with the assistance of the LMAC and Zim-ACP, the dairy, beef, stock feed and poultry industries of Zimbabwe have compiled documents showing the cost of compliance with various government legislation and regulations (e.g. Tables 5.3 – 5.5), and are using those document to lobby for the reduction/removal of some of the levies. Similarly, in Malawi, CREMPA and MMPA monitor the cost of milk production, and the inflation rate and use the information that they gather to lobby for the adjustment of milk prices in their favour (Text Box 3).

Table 4.3 Example of calculation of cost of compliance for the beef value chain in Zimbabwe

Levy/regulatory cost	Cost per animal sold
Land unit tax (\$/ha)	\$ 22.07
RDC Levy (if increased to 11.625%)	\$ 70.99
Police clearance	\$ 0.17
Department of Veterinary Services movement permit	\$ 0.17
Registration with Agricultural Marketing Authority Statutory Instrument 147	\$ 0.29
Registration & inspection by veterinary public health	\$ 0.12
Registration & inspection by environmental management authority	\$ 1.22
Carcass inspection fee	\$ 2.00
Department of Livestock Production & Development carcass grading fee	\$ 1.50
Meat inspection & transfer certificate	\$ 0.13
Total	\$ 98.66

Table 4.4 Cost of compliance for stock feeds (importing a 300MT load of raw materials)

Levy/regulatory cost	Cost per animal sold
Veterinary permit	\$ 20 per load
Agriculture permit	\$ 10 per permit
Agent permit application fees	\$ 25 per permit
Plant inspection fees	\$ 10 per load
Veterinary release permit	\$ 20 per load
Environmental Management Authority	\$ 10 per load
Physical examination permit	\$50
Total	\$145 per load

Table 4.5 Cost of compliance for importation of hatching egg

Levy/regulatory cost	Cost per animal sold
Importation costs for a 100 000 egg load:	
Once off payment for source inspection by the Department of Veterinary Services	\$ 3 155
Collection of A/C veterinary inspector	\$ 20.00
Collection of A/C Port Health	\$ 30.00
Agency and monitoring	\$ 250.00
VAT	\$37.50
Charges on veterinary imports permits (\$ 300/12)	\$25.00
Charges on agriculture import permits (\$ 120/12)	\$10.00
Total regulatory costs	\$ 372.50

In Botswana, the farmers' major concerns were high cost and effort of importing production inputs (feed and breeding and production livestock) from South Africa. For example a 32 tonne truck carries 32 tonnes of concentrate but 20 tonnes of roughage and yet the cost of importing the two products is the same. The inspection fees for a veterinary certificate were R1 500 per animal whether it is a bull or a cow. This disadvantages dairy producers who import more cows and less bulls (unlike the beef producers who import more bulls, and in smaller quantities than cows). Finally the issuance of import permits was cumbersome, and was exacerbated by the fact that the permits were only valid for a week since the 2011 outbreak of foot and mouth disease in South Africa.

The National Wool Growers' Associations of South Africa (NWGA) and Lesotho National and Mohair Growers Association (LNWMGA) have similar approaches to improving fibre production from the small holder sector (which is predominately in the Eastern Cape in South Africa and in the mountains of Lesotho.

Both organisations have aggressively gone out to improve wool sheep breeds, shearing, grading and storage of the fibres and access to the markets. The efforts of both organisations in their respective countries have been tangible increases in the incomes of the smallholder farmers that they work with (e.g. Figure 4.2) accompanied by the farmers’ increased appetite for improved technologies, skills and knowledge that enhance their fibre production. As such, most of their lobbying and advocacy for the smallholder fibre producers have been to ensure that they receive/ access support services (such as shearing and storage infrastructure, breeding stock, training and mentorship, harvesting and classing of wool, market information and predation management) to enable them to develop as producers.

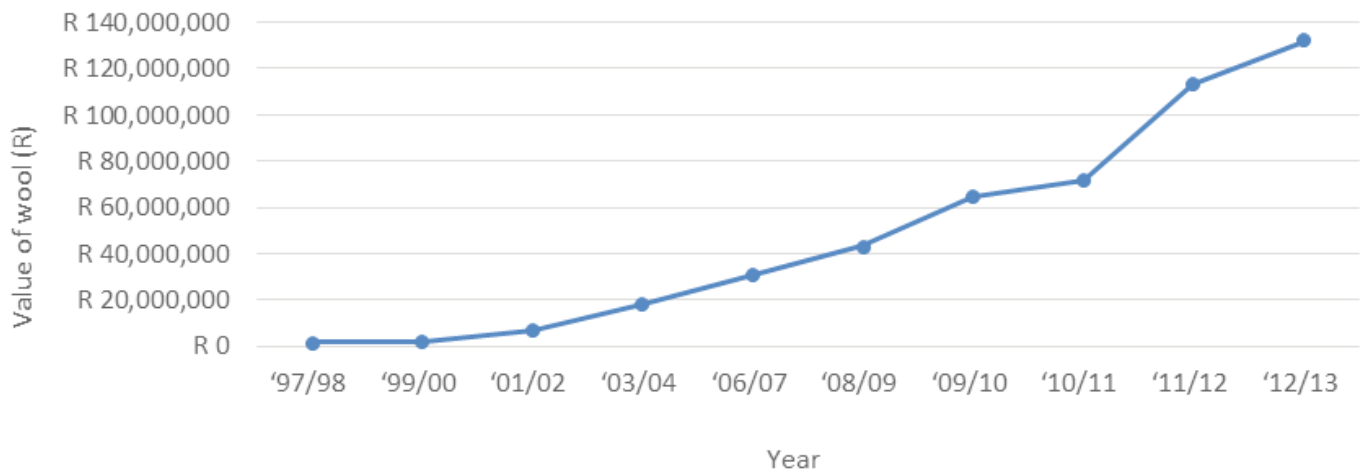


Figure 4.2 Value of wool produced by communal farmers in the Easter Cape province of South Africa (1997-2013).

The organisations that represent established commercial farmers tend to have capacity to collaborate with government to deal with some of their challenges. For example, when faced with an outbreak of African swine fever a year ago, SAPPO paid for the stamping out of the disease within three weeks and say that had they left it to the government of South Africa to react, it might have taken too long and resulted in a wide spread infection. Similarly the animal industries of South Africa under the auspices of the National Animal Health Forum (NAHF) contributed to the cost of capturing the data on the serological tests that were done in response to the 2011 foot and mouth disease outbreak in KwaZulu Natal province. Consequently, DAFF was able to analyse the data and submit the dossier to the World Organisation for Animal Health (OIE) timeously leading to South Africa being declared FMD free in February 2014. In Namibia, members of LPO and NAU voluntarily monitor the codon and border fences, take pictures and submit reports on the status of the fences to the government in order that the officials follow through with repair and maintenance. The South Africa industry, as much a possible endeavours to contribute to finding solutions to challenges that the industry faces, by for example, by making contributions to research on predation management in order to come up with acceptable control measures, research in veterinary vaccines and medicines, and seeking and assisting DAFF with legal opinions around national legislation when there are instances that the legislation could be violated by unscrupulous dealers.

Producer organisation were mainly concerned with aspects pertaining to the commodities and preferred to handle the lobbying and advocacy on such matters in-house but delegate the cross cutting issues (such as labour, land, some cross-border trade issues) to the unions. Where producer organisations were long – established than the unions in thier country, they preferred to handle most matters themselves; e.g. poultry producers in Malawi, Mozambique, and Swaziland; dairy producers in Zimbabwe (who have broken ties with CFU) and Malawi (CREMPA), MPE in Madagascar, Power Team in Swaziland and pig producers in Swaziland. The Botswana producer organisations were not aware of BAU. They felt that they were self-sufficient in

handling their issues and did not yet need a union. Where there was some level of dependency on the union to handle livestock issues were instances where the producer organisations at grassroots level were not well established/or organised (e.g. in Malawi FUM had a project to mobilise and organise beef producers; ZFU organising beef producers into association in Zimbabwe), the special case of Namibia in which the major commodity is beef, and the South African producer organisations who have more or less clearly defined roles between the unions and the producer organisations.

Thus one gets the impression that livestock farmers (especially intensive producers) prefer to handle their issues and not depend on the unions for lobbying and advocacy on industry specific issues. Fortunately, most producer organisations said that they have strong enough linkages with the government structures to be able to articulate their concerns and be heard; and hence may not see the need to go through unions for livestock specific matters. The weaker associations with limited capacity for lobbying and advocacy are largely dependent on government officials to provide the conducive support for the growth and development of their enterprises.

4.2.2 Characteristics of livestock producer organisations and capacity to deal with the livestock issues

From the consultations that were conducted, it appears that producer organisations that have developed into strong ones had the following characteristics:

- Have commercial orientation (and hence poultry, dairy and pig producers always seemed better organised because, being intensive production systems, they can only be done as commercial enterprises).
- Were led by people who understood the industry and provided good leadership.
- The members were united for a common purpose.
- They were established by farmers and are farmer driven and not driven by external services providers (government or donors).
- Had some sources or could generate information for decision-making, lobbying and advocacy
- Had grown to be self – reliant in funding and could have offices, employ office staff and pay for critical activities to avert/minimise threats to their industries.

On the other hand weakly organised producers were characterised by:

- Members who were predominately subsistence-oriented. This was more common amongst smallholder cattle, sheep and goat producers in most of the region (except for the wool and mohair producers in Eastern Cape and Lesotho).
- Different production objectives and hence weak commitment to the intended producer organisation objectives.
- Lack of technical expertise or capacity to address technical constraints (e.g. access adapted high yielding breeds, access to appropriate infrastructure to enhance productivity and market access, such as bulking tanks and access to affordable feeds).
- Ordinarily run by the leadership of the organisations and have no staff or offices.
- Members' resistance to change (adoption of e.g. ear tagging and castration) due to cultural beliefs
- Lack of trust amongst community members (possibly because of the different production focus).
- Were started by or heavily subsidised by external support (e.g. the dairy farmers under MDB in Madagascar and Dairy Board in Swaziland)

4.2.3 Linkages of livestock producer organisations to unions

Table 4.6 Interventions of farmers' unions in livestock sector growth

Union	Activities in livestock
LENAFU	Have a strong wool and mohair industry. Assisted them to continue selling products through the Port Elizabeth market which they are used to and is transparent as opposed to the newly proposed facilities that were being established by government. LNMWGA generally run their affairs. They are aware of the long standing challenges of the dairy industry which have not been resolved.
SNAU	Needs to strengthen its commodity associations. They provide credit to farmers including livestock, represents livestock issues (e.g. resuscitating of a livestock breeding station in Mpisi was presented to agriculture portfolio committee). They would like to perform a study profiling each of the agricultural regions and what they are suitable for but don't have such funding yet.
NAU	Work well with the Livestock Producers' Organisation. Represent issues to the Ministry, Meat Board and other relevant stakeholders. Communicates to members through platforms such as electronic newsletter, news magazine and meetings and website. Regulate all its commodity association, and perform lobbying on their behalf, as well as facilitating training for members.
NNFU	Lobbying and advocacy for policies that support the development of the smallholder farmers. Provision of information to farmers through forums such as radio stations and farmer meetings Skills development and capacitating its members Coordinate member associations' activities
ZFU	Shares information through its publications, website and social media. Information also include market information. Provide linkage to service providers for training and extension. Lobbying for the reduction of RDC levies at auction pens. Promoting feedlots in Matabeleland. In the process of developing livestock commodity associations in Matabeleland. Sits in the LMAC on behalf of livestock producers.
CFU	Have lost most of its commodity association but sits in the LMA on behalf of livestock farmers. Continues to do lobbying and advocacy for livestock issues (such as RDC levies, veld fires, theft of fences, disease control, cost of securing cattle movement permits, cost of compliance with environmental management agency regulations, access to finance, high CITES fees and levies for crocodile producers, high cost of production inputs for poultry industry).
ZCFU	Participates in LMAC activities, holds shows from national through to district level, have negotiated for and secured an insurance product for livestock that can be used as collateral.
FUM	In the process of establishing cattle associations in the South, working with government for privatised veterinary services and provision of veterinary kits to community based primary animal health care workers. Lobbied for increased duty on imported milk powder, which created room for growth of the local producers.
Agriculture Chamber (Madagascar)	The challenges of livestock are stock theft and diseases. The Chamber proposed to VET-GOV that paravets be employed to deal with livestock diseases. They also work closely with producer organisations such as MPE. They run Farmer Field Schools which provide training in various aspects. They are lobbying for the e 10% budgetary allocation to agriculture, of which 30% should be allocated to livestock.
FEKRITAMA	Have a livestock association in their structure (FMM), for which they have facilitated strengthening of internal governance.
UNAC	Their main agenda is agrarian issues and not so much industry specific matters.
AgriSA	Cross-cutting issues such as land, electricity water, labour. The commodities s mainly handle their matters. Intervene when there are matters of regional interest such as the current matter of imports/exports between South Africa and Namibia. Facilitate negotiations of trade pacts such as the Free Trade Aran of SADC, the EU- SADC Economic Partnership Agreement and the SACU agreements.
AFASA	New association and has been focussing on building the organisation. Cross cutting – land, labour, water etc. Works with other unions in the Agri-Sector Unity Forum (ASUF) to handle these matters. Organises smallholder farmers and link them to existing commodity organisations but offers them a platform to discuss and have their specific issues dealt with, which would not necessarily apply to the established commercial farmer; e.g. access to land and land tenure security, start-up funding for agricultural production, aggregation along the value chain. Has provided much input into the development of recent land policies.

Representatives of some unions were sceptical of establishment of regional producer structures because of the potential conflict between the mother bodies and their members in operating in this space. They suggested that regional issues be escalated through the unions. The establishment of livestock platforms should therefore be cognisance of this potential conflict, especially if it will be done through SACAU, where most producer organisations are represented by their unions.

4.3 Capacity and sources of funding

Most the unions had secretariat with staff in the office to perform basic functions. These ranged from one employee (NECFU) to about 100 (ZFU) employees.

The major sources of funding were:

- Levies (ZFU & CFU in the past, NNFU, NAU, RMIF)
- Membership fees
- Donor funding of projects
- Donor grants for capacity building
- Government support for capacity building (e.g. Madagascar, founding of AFASA)
- Project management fees
- Long term investments (e.g. AgriSA, CFU, NAU, FUM and ZFU)

In most instances, the membership fees are not adequate to cover the basic functions of the union and need to be supplemented by other sources of income; more so for the newer organisations that represent smallholder farmers. The challenge that faces such unions is keeping a balance between what they should do for their members and what can be done with the secured funding. In some instances there could be heavy dependence on external funding. For example, in Madagascar each one of the five major agricultural organisations is referred to with reference to their major funding partner; i.e. FEKRTAMA (Agriterra, and SACAU), CPM (SACAU), Koloharena (USAID which has since ended), FIFATA (Fert) and Réseau-SOA (Agriculteurs Français et Development International, AFDI).

5. INSTITUTIONAL AND GOVERNANCE ARRANGEMENTS TO SUPPORT LIVESTOCK RELATED WORK

In each of the countries a number of organisations and institutions were consulted with regards to their mandate and policies for the support of farmer organisation. In all countries government departments that deal with animal production, veterinary services and extension support and research (Botswana and Madagascar) were consulted and in many instances this was in one meeting organised by the country's VET-GOV policy hub coordinator. The following sections deal with the support that is provided to farmer organisations by the institutions, their working relations with the farmer organisation and their perception of where the farmer organisations should be strengthened.

5.1 Engagement with the Ministries of Agriculture

Table 5.1 Government ministries that were consulted

Country	Ministry of Agriculture representatives that were consulted	Ministry's livestock- related department's perceptions, engagement with and support for farmer organisations
Lesotho	VET GOV Policy Hub Committee (includes the Department of Livestock Services, Depart of Planning & Policy Analysis, Veterinary Medical Association (private sector) and farmer organisations)	<p>The interests of livestock farmers are channelled through the Hub. Most producer organisations (piggery, poultry and dairy) engage well with the ministry's departments and involve them in their activities but not LENAFU.</p> <p>The Department of Livestock Services used to have close interactions with LENAFU when they were housed in the Ministry offices. LENAFU was invited to be part of the Hub but has never participated in the Hub meetings.</p> <p>The livestock sector is not well represented in CAADP (the Hub did not formally participate in the development of the compact leading up to the launch of CAADP).</p> <p>The Hub needs financial support (as spelt out in VET GOV Hub action plan) to enable better communication with farmers and other stakeholders.</p> <p>Farmer organisations need strengthening in governance and capacitation to communicate with members (which could be done through the Hub).</p>
Swaziland	Met with Animal Husbandry, Extension, and veterinary services led by Dr Roland Dlamini -	<p>Establishment of SNAU was driven by government (top/down approach) and hence the union has poor linkage with producer organisations.</p> <p>There is a need to strengthen producer organisations as well as their linkage to markets. It was suggested that marketing boards could be a solution. Strong producers' organisations with leaders who can advocate for policies could make better linkages to SNAU.</p> <p>Leadership training is essential but the challenge is high turnover of leaders</p> <p>Swaziland is implementing an e-governance policy.</p>

Country	Ministry of Agriculture representatives that were consulted	Ministry's livestock- related department's perceptions, engagement with and support for farmer organisations
Namibia	Yolande Kauviri, Veterinary Services & National VET GOV Policy Hub, Livestock Research	<p>The ministry and farmers have good communication and working relations. The Directorate of Veterinary Services distribute most of its information to farmers through the farmer organisations (NAU & NNFU) who use radio slots, electronic newsletters and meetings to communicate with members. In turn farmers invite state veterinarians to talk at their meetings, either to train them or provide industry specific information. Generally farmers south of the codon fence are keen for information and realise its importance for their livestock business.</p> <p>Farmers are consulted in the planning of the research agenda of the ministry. Their major interests are resilient pastures, adapted livestock breeds, increasing milk production of indigenous animals. Research findings are disseminated through publications, demonstrations at the government research farms, talks on farmers' days and through producers' organisation, unions and extension services.</p> <p>Farmers are engaged in development of policies (e.g. livestock improvement policy of Namibia).</p> <p>Farmer organisations should be organised to provide members with better linkage to markets and assist them to improve products to suit market requirements.</p> <p>The challenges of low productivity in the northern communal areas where 60% of the cattle are found need to be dealt with to increase the contribution of this herd to national beef production.</p>
Botswana	Veterinary services, Extension, Animal production, Policy & research and Agriculture Hub	<p>Extension prefers to work with farmer groups and hence encourages clustering of farmers. The major challenge is subsistence - oriented production (for 85% of cattle on communal land); which makes it difficult to meet export market requirements. Dairy and poultry producers are more commercially-oriented and the challenges are not quite the same as for beef industry.</p> <p>The government strategy since independence has been to support farmers to alleviate poverty; and hence the sense of self-reliance has not been engendered in the majority of smallholder farmers. From 1991 the policy thrust was self – reliance and the present day policy thrust (since 2010) is food security (diversification of production base, increase in productivity).</p> <p>The Department of Veterinary Services endeavours to create a conducive environment for biosecurity (and hence the 'cumbersome' import protocols) and access to export markets (e.g. use of the bolus system for traceability and implementation of foot and mouth disease prevention measures. The Department is looking into using compartments as export zones and has established some for the dairy industry.</p>

Country	Ministry of Agriculture representatives that were consulted	Ministry's livestock- related department's perceptions, engagement with and support for farmer organisations
		<p>The Department of Animal Production focuses on production development (and hence technology transfer, training and providing information). It has facilitated demarcation of farms (850 ranches, of which 300 are fully developed). Farmers now need access to development finance to develop the farms.</p> <p>The Department of Agricultural Research & Policy Development coordinates all policy related issues in the Ministry. They have developed a new agriculture policy and will soon consult farmer organisations for their inputs and comments.</p> <p>All departments engage with farmers though there is no formal arrangement for such engagement. The limitation to the work done is funding for agriculture.</p> <p>The Agriculture Hub (N.B.: not VET-GOV Policy Hub) was established in 2008 to drive diversification and commercialisation of the agricultural sector. Their major function has been to drive investment into infrastructure that is required for agriculture (e.g. road networks), support both local and foreign investors to increase production; seek and identify export markets (and hence has offices in Botswana, England and India to achieve that.</p> <p>The producer organisations felt that government departments should accord them more recognition, interact with them more and implement decisions that are taken collectively. They felt that there was too much complacency within the Departments but generally applauded the government for the amount of growth that it has supported in the past 15 years.</p>
Zimbabwe	Division of Livestock Production and Development	<p>In the past Zimbabwe had strong farmer organisations with a good grasp of the agricultural industry. Now the organisations are low profile and the commodity associations are non-existent. The Ministry itself now has weak extension services (1 officer to 2,500 livestock farmer versus the recommendation of 1 extension officer for every 400 farmers). Resources tend to be allocated more to crops but this might change with the recent introduction of a 2nd deputy ministry, responsible for livestock.</p> <p>In the past there was close and regular interaction between extension and research (extension taking matters from the field to research and new findings to farmers) but now that interaction has died down. Farmers' input into policies is through stakeholder meetings and interaction with field staff.</p> <p>There is a need to resuscitate livestock commodity associations, livestock breeding activities and to provide increased support to A1 and A2 farmers.</p> <p>The government has its own policy programme, ZIM ASSET (Zimbabwe Agenda for Sustainable Socio-Economic Transformation). CAADP is running (in the Economics and Marketing Unit), and the consultations were conducted by World Bank in 2013 have been</p>

Country	Ministry of Agriculture representatives that were consulted	Ministry's livestock- related department's perceptions, engagement with and support for farmer organisations
Malawi	Directorate of Animal Health & Livestock Production, Lilongwe Agriculture Division	<p>used to inform the draft livestock strategy, which is not yet finalised.</p> <p>Farmer organisations used to be strong at national level but since the decentralisation of government, the top structures have weakened but the village and regional structures are strong. The agricultural division is a one-stop services for most government support services to agriculture. Malawi lost many cattle to Mozambique 15 -20 years ago in the southern region, and is now focussing on building the herd. They also have a target of building up the poultry industry from a per capita consumption of 1 chicken in 4 months to 5 chickens per month (current rate is one chicken/month). They have a pass the gift programme for goats. Pig production is generally low. The Lilongwe division facilitates agribusiness development and hence the establishment of farmer groups, training them in production and provide them with primary animal health care kits.</p> <p>Generally there is a need to grow the technical expertise of the farmers for the commodities that they produce.</p> <p>The ministry has a dire shortage of veterinarians, it needs at least 100 but currently has 10 in its employ.</p>
Madagascar	Directorates of Professionalisation, Animal Resources and Veterinary Services, Minister of Livestock	<p>The Directorate of Professionalisation's main mandate is building farmer associations and supporting them. They have worked with established MPE, Malagasy Dairy Board (MDB), FENAM and the big five agricultural unions to mobilise farmers and link them to associations. Their areas of intervention are determined by the demand from the farmers.</p> <p>In addition to the producer organisations, the directorate links up role players in the value chain. They feel they have had success with dairy, poultry and honey and little success with beef cattle. Beef cattle, sheep and goat producers were the least organised.</p> <p>Directorate of Animal Resources' role is policy – making and establishment of the institutional framework governing animal resources. Their current focus is linking smallholder farmers to mainstream markets and the value chain, and engaging the private sector (e.g. Avitec and Agrifarm in the poultry industry) to link up with smallholder farmers. More needs to be done for genetic improvement of livestock. Currently there are not enough breeders; only 3 for dairy cattle, 2 for pigs and none for cattle and small stock. There are also five companies that breed fodder seed.</p> <p>Stakeholders are consulted in policy formulation. Research policy is in the Ministry of Agriculture; livestock farmers have no inputs there.</p> <p>The Directorate of Veterinary Service's main function is to preserve animal health; improve sanitary control measures in the country and prevent diseases from abroad. Their main activities require a good disease surveillance network, diagnostics capacity and strengthening border controls. Farmers were involved in the Performance of Veterinary Services (PVS) evaluation and in the</p>

Country	Ministry of Agriculture representatives that were consulted	Ministry's livestock- related department's perceptions, engagement with and support for farmer organisations
		<p>development of the CAADP compact. The Directorate works with that of Professionalisation to engage with farmers.</p> <p>The biggest challenge for the livestock sector is that it is highly underfunded (e.g. the Directorate of Veterinary Services say they need €5,000,000 but are running on a budget of €130,000 per annum. Its job vacancy rate is 84% for veterinarians and 70% for para-veterinarians). The Minister of Livestock urged that there should be more funding for the livestock sector; that the government should allocate 10% of the national budget to agriculture and of that, at least 30% should be specifically for livestock. She requested that AU-IBAR assists the Ministry in this advocacy.</p> <p>The main challenge was how to improve commercially-oriented production given that many families own livestock but productivity and market linkages are too low. It was said that there were 1 200 000 farm families in Madagascar, an average of 8 zebu cattle per farm family, 10 000 of them produce honey, 20 0000 produce sheep, goats, pigs and dairy cattle, and 80% own poultry. Farmers require support with primary animal health management. Farmer associations should be encouraged and strengthened because it is easier to work with organised farmers.</p>
Mozambique	Directorate of Veterinary Public Health, Animal Production, Panning, Wildlife Veterinary Control, Epidemiology and Extension	<p>The Ministry's mandate for livestock is to improve production and productivity. The various directorates' mandates include securing animal health, improving production, organising farmers and linking them to markets, and providing them with information.</p> <p>90% of production is in the smallholder sector is subsistence –oriented production. There is thus a great need for farmer education and linkage to markets. The Mozambique National Poultry Association (AMA) is the best organised, with a national structure. It has effectively lobbied for imposing of levies on imported feed and poultry products, proved that they have the capacity to supply poultry locally and subsequently grown to supply the market (with the support of a government policy that identified poultry as a priority industry for support 10 years ago). Dairy and pork industries are still at an early stage of development (pork is constrained by the endemic African swine fever). Beef cattle and small stock are the least organised producers but there are programmes to support them; e.g. PROSUL (Pro-poor value chain development) in the Maputo and Limpopo corridors is endeavouring to bring together livestock producers in the south along with private sector role players and facilitate market linkages.</p> <p>Government facilitates the formation of farmer associations and cooperatives, which are legally registered entities.</p>

From the above, the emerging issues for consideration are as follows:

- The ministries generally do not have standing platforms for engaging with farmers. Reference was made to stakeholder consultations but these seemed to be ad hoc, as and when there was a matter to discuss (e.g. a policy, legislation or regulations that needed endorsement).

- In most countries the farmers' voices are weak (and possibly the reason for no continuous engagement with them).
- The largely subsistence-oriented production systems pose a challenge for the development of the livestock sector and yet there are indications that farmers can be assisted to be more commercially oriented; more so for some commodities (poultry, dairy, piggery, honey) than others (beef cattle and small stock production).
- The lack of capacity for breed improvement. Countries around South Africa solely depend on South Africa. There is opportunity to develop breeding, possibly first by semen importation and over a long term develop local breeding industry. Zimbabwe demonstrates that this is possible in that during the economic downturn, breeding activities ceased but are now being resuscitated. Fortunately there is the institutional and technical memory to make this possible.
- Generally government officials appreciate strong associations because they make their work easier (e.g. AMA in Mozambique, MPE and FENAM in Madagascar).

5.2 Other institutions

5.2.1 Veterinary Governance Policy Hubs

Other than Botswana and South Africa, all other countries had established their VET-GOV policy hubs. These seemed to foster engagement between farmers, government and other stakeholders on all livestock matters (e.g. participation in the CAADP process, compliance to legislation, and review of legislation. However they did not always come across as well-streamed into the day to day functions of the ministry functions on livestock but rather as an additional 'project' which needed funding from AU-IBAR and would possibly fold up if not supported financially. A recommendation is that the Veterinary Governance Policy Hubs should be managed by the highest level of either the Department of Veterinary Services but preferably the policy planning units of the ministries of agriculture/livestock. That is, the programme should be managed at a level where the coordinator can easily convene stakeholders, provide and influence relevant policies (some of which would be veterinary policies and others general agricultural policies that encompass veterinary matters). The coordinator should easily mainstream the veterinary governance programme into his/her activities and see it as an enabler of his/her work rather than as an added function.

5.2.2 Livestock and Meat Advisory Council (LMAC), Zimbabwe

The Livestock and Meat Advisory Council (LMAC) was established in 1994 by government as part of the privatisation process when marketing boards were done away with. However, like all other Councils that were established then, it never received any support from government but the private sector took up the initiative and strengthened it. The LMAC aims to protect, promote and further the interests of persons engaged in the livestock and meat industry in Zimbabwe and ensure the economic viability of the sector. LMAC's scope of work involves identification, deliberation, discussion and research of key constraints affecting the growth of the industry and proposing evidence-based solutions on the constraints to Ministry of Agriculture. It is funded by its member associations which include the following:

- Zimbabwe Poultry Association (ZPA)
- Zimbabwe Association of Dairy Farmers (ZADF)
- Stockfeeds Manufacturers Association (SMMA)
- Zimbabwe Association of Abattoirs
- Livestock Identification Trust (LIT)
- Zimbabwe Herd Book (ZHB)
- Pig Producers' Association of Zimbabwe (PPAZ)

Officials from the public sector, specifically the Ministry of Agriculture, Mechanisation and Irrigation Development, are invited to attend and participate in the meetings.

LMAC is part of the VET-GOV Policy Hub in Zimbabwe and have used the work they have done so to propose an action plan for the Hub. They comment that currently, most commodity associations are either weak (e.g. for pigs and poultry) or non-existent (e.g. red meat producers). The LMAC is driving an initiative to establish red meat forums, starting at district level and hopes that a producer organisation will be born out of that. Their impression is that farmers' unions are not effective enough in representing livestock issues because they have a lot to deal with, and tend to be biased towards the crop industries.

LMAC recommends that in order to strengthen farmer organisations' capacity for lobbying and advocacy, the organisations should learn a culture of writing evidence-based position papers that focus on what government can do. An example given was that if input costs were escalating, the organisations should be able to unpack the courses of escalation and make feasible recommendations on how to contain/reduce the costs.

It was suggested that unions should build bridges amongst the producer organisations, and with them, have a forum for livestock producers (e.g. the Livestock Producers' Forum of Namibia which brings together producers from the three unions), which should be in a position to provide guidance to the unions on the issues that needed to be addressed for the sector at the level of the unions.

5.2.3 Zimbabwe Agriculture Competitiveness Programme (Zim-ACP)

The programme was established in 2010 to enhance the capacity of representative bodies in the private sector for policy advocacy, ability to effectively engage with government and hence increase competitiveness of the agricultural sector. Their intervention has been to train leaders and technical units of farmer organisations (ZFU, ZCFU and CFU) to be effective. The training covers leadership, building technical capacity, pro-active lobbying and advocacy, family farming, gender mainstreaming, analysis of regulations and their impact on competitiveness. The organisations are taught and assisted to develop and write position papers. The position papers are commissioned to qualified research institutions (e.g. for regulatory reforms, Zim-ACP works with the Centre for Applied Legal Research who have built in expertise on such matters). Zim-ACP have worked with other commodities such as horticulture, cotton, tree crops, and grains and legumes.

The programme has been building the capacity of research units that can provide required information for lobbying and advocacy (such as the LMAC), so that they should be able to continue to produce regular and up to date production and market information, which can be used for effective lobbying as well as provision of effective extension services.

Zim-ACPs recommendation was that the VET-GOV Policy Hub needs to focus more on regulations, as these were the main instruments that impact on the performance of the sector. Secondly the work that the Hub intends to do could conflict with the Economics and Marketing Unit of the Ministry of Agriculture in Zimbabwe, and hence the capacity for policy research and formulation should be built within that unit.

Zim-ACP would be willing to partner with other development agencies in the capacity building work that they do.

5.2.4 Malagasy and Swaziland Dairy Boards

The Malagasy Dairy Board (MDB) and Swaziland Dairy Board perform similar functions in that they endeavour to develop the production capacity of farmers as well as support the development of the entire milk value

chain (i.e. including collection, processing, distribution and retail). Because the two institutions work with smallholder farmers who produce low volumes of milk per day (5l/cow/day with an average of three cows in Madagascar, and 10-15 l/cow/day in Swaziland for the smallholder farmers with 1-10 cows). The scope of their work spans from assisting farmers to access or produce feed for their cows, access to breeding stock and semen, access to animal health services, access to collection points. They also do the lobbying and advocacy for the dairy industry.

Some of the respondents (i.e. Officials in the Department of Veterinary and Livestock Services in Swaziland, and the representative of SAPPO in South Africa) felt that marketing boards were useful institutions for building production and marketing capacity amongst smallholder producers and should be re-introduced in areas where they were done away with during economic structural reform programmes. While these recommendation may hold, the interventions should ultimately strengthen the entrepreneurial skills of participating smallholder farmers so that they eventually outgrow the support programmes. Otherwise they could perpetuate heavy dependency on such institutions, and not develop the farmers' resilience to unfavourable to market conditions.

5.2.5 Heifer International (Malawi)

Heifer International in Malawi is involved with farmer communities and assists them to mobilise into producer organisations, trains them on leadership, governance, handling group dynamics and lobbying and advocacy. Heifer International also facilitates the linkage of such groups to markets. Their main objective is to empower the groups to demand services that are due to them; and believe that "what steals power is lack of knowledge and skills". Part of their interventions include training of milk bulking groups to evaluate the cost of milk production and hence demand a price that makes their businesses viable (especially in the face of inflation). They are doing similar work with poultry producers. Heifer International collaborates with other development agencies in the work that they do (such as Care International, Development Fund of Norway, USAID and Heifer Netherlands).

5.2.6 MeatCo and Meat Board (Namibia)

Mr Vehaka Tjimune shared his experiences and opinions based on the work that he had done as an employee of the NNFU for almost 10 years, Ministry of Agriculture, Water and Forestry for seven years and now of the MeatCo. Mr Goliath Tujendapi, Manager: Trade spoke on behalf of the Meat Board.

Their perception was that NAU has the capacity to do research and take informed policy positions, whereas NNFU has the political power, can identify the challenges faced by farmers on communal land but does not have the capacity to propose informed solutions. An example was given that NNFU was not for the Communal Land Reform Act (of 2002) but failed to lobby for it not to be enacted. NECFU is a new union and has strong political lobbying capacity but is not well connected on the ground. The two older unions are sustained by levies from the industry but NECFU is not yet privy to the levy. The three unions sit in the Joint Presidency Committee, which is looking into ultimately establishing an apex body for the unions.

Mr Tjimune proposed a union structure that has the following chambers (based on the French model):

- Young farmers
- People who farm to preserve culture (subsistence –oriented farmers in the case of Africa)
- Commercial farmers
- Chamber of agriculture to which most of the work that is done for the sector (e.g. research and extension) is outsourced.

Interventions for each segmented could then be targeted accordingly.

He suggested that SACAU could use similar chambers (small, medium and large scale farmers) with clear definition as well as targeted programmes for each chamber.

The capacity issues that need to be addressed were identified as follows:

- There should be commodity based extension for which government provides norms and standards. The current situation in Namibia is that the best extension personnel are in the private sector, mostly poached from government.
- Build capacity for farmer representation (especially at national level).
- Reform policy issues that affect farmers on communal land.
- Market prices; although Namibia has a free market system, prices of livestock in communal areas vary greatly, largely because the farmers are uninformed and hence the buyers take advantage of that. A suggested solution was to build stronger regional associations that run auctions and inform members of prevailing prices.
- Intervene in the low productivity of the Northern Communal Areas where offtake is 1.2% compared to 25% in the South.
- Ensure that farmer organisations are led by skilled, knowledgeable people who can take and challenge decisions. Have strong leaders.

5.2.7 Swazi Meat Industries

Swaziland Meat Industries Limited (SMI) is a company which buys, feeds and slaughters cattle and pigs. Its products are sold locally (67%), Mozambique (23%), South Africa (2%) and Europe (8%).

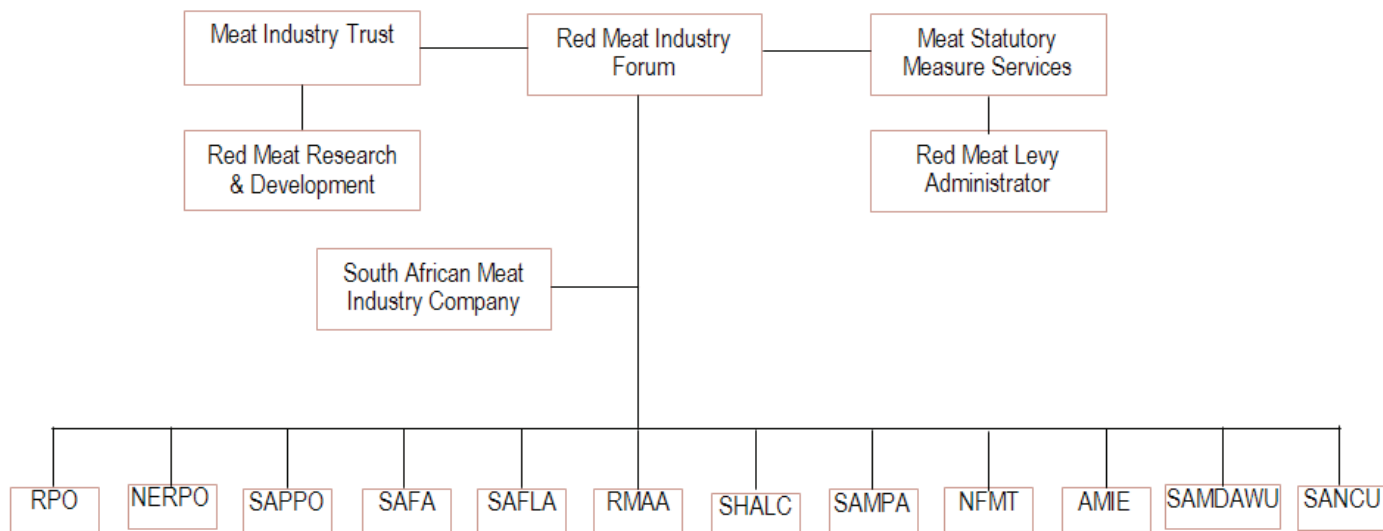
SMI's main markets are in Swaziland and southern Mozambique where its flagship Simunye Beef and Pork brands are sought after by the majority of meat consumers.

SMI buys some of its beef cattle from local suppliers, predominately members of Power Team. At some point smallholder farmers supplied up to 30% of the slaughter stock but have reduced to 15%. The farmers' main challenges have been increase in feed costs while they have not made alternative plans to control these costs, limited veterinary support and the introduction of VAT in 2012. Most smallholder farmers are not VAT registered and hence cannot claim back the VAT.

According to the Manager of SMI, local production could be improved by supporting farmers who work (and hence can afford to) to improve the genetic quality and productivity of their herds. The farmers also needed technical support, affordable loans and discounted prices of inputs. Swazi Meats has instituted a loyalty card that entitles farmers who supply them to discounts with major input suppliers.

5.2.8 South African red meat industry structures

The South African red meat industry has a highly organised structure, which involves representatives of all role players, from producers to consumers (Figure 5.1). Each of the role players is responsible for handling matters pertaining to its segment of the sector. Collectively the industry looks after matters of common interest such as consumer assurance, consumer communication and education, transformation and development, research and development, industry liaison, production development and compliance to legislation. The industry uses statutory levies and funds from the Meat Industry Trust to fund these functions.



RPO – Red Meat Producers’ Organisation; **NERPO** – National Emergent Red Meat Producers’ Organisation; **SAPPO** – South African Pork Producers’ Organisation; **SAFA** – South African Feedlot Association; **SAFLA** – South African Federation of Livestock Auctioneers; **RMAA** – Red Meat Abattoirs Association; **SHALC** – Skins, Hides and Leather Council; **SAMPA** – South African Meat Processors Association; **NFMT** – National Federation of Meat Traders; **AMIE** – Association of Meat Importers and Exporters; **SAMDAWU** – South African Meat Distribution and Allied Workers Union; **SANCU** – South African National Consumer Union

Figure 5.1 Structure of the South African Red Meat Industry

The industry role players (particularly the producers) participate in a number of key forums such as the following:

- **National Animal Health Forum (NAHF).** This a voluntary forum of role players in the animal industries, and consists of, amongst others, cattle, sheep, goat, game, horses, pets, poultry and pig producers. The members meet and discuss health challenges (e.g. see a recent agenda in Tex Box 6). The NAHF’s views are then discussed in a liaison meeting with representatives of DAFF in efforts to resolve the identified challenges and constraints that face the animal industries. This approach has enabled the animal industries to amicably resolve a number of issues in collaboration with the government officials. The Animal Health Forum is now duplicating in the provinces, an essential move because veterinary services is a concurrent responsibility of both national and provincial governments. The Animal Health Forum is possibly the ideal structure to include in a Veterinary Governance Policy Hub in South Africa because it is already handling a number of policy and regulations related matters on behalf of the animals industries in the country, and the duplication of the Forum in the provinces will ensure some alignment between what is done at provincial and national levels.
- **Stock Theft Forum.** The Stock Theft Forum consists of livestock industry representatives, representatives of the stock theft unit in the Department of Police and relevant government departments. The forum meets to discuss and come up with strategies to combat stock theft.
- **Predation Forum.** A forum that consists of industry role players, representatives of government departments of environmental protection and agriculture. The forum discusses, facilitates research and provides guidelines and advice to producers on appropriate technologies for combating livestock predation in the most humane and environmentally sustainable manner.

Most of the producer organisations are members of AgriSA or AFASA (NERPO only). These unions represent industry matters in a number of national forums, such as the following:

Text Box 6:

AGENDA FOR THE NATIONAL ANIMAL HEALTH FORUM

23 APRIL 2014 AT 11:00 AT THE BOARD ROOM, 318 THE HILLSIDE, LYNNWOOD

1. **OPENING**
2. **MOTIONS**
3. **FINALISATION OF THE AGENDA**
4. **APPROVAL OF MINUTES OF THE MEETING OF 20 FEBRUARY 2014**
5. **MATTERS ARISING FROM THE MEETING WITH DAFF HELD ON 23 APRIL 2014**
 - 5.1.1 Possible change to legislation regarding
 - Legal aspects
 - Unregistered vaccines act 36, act 101 and veterinary/para veterinary act
 - 5.1.2 OIE PVS report
 - 5.1.3 Community service
 - 5.1.4 Vaccine bank – OBP
 - 5.1.5 PFR
 - 5.1.6 Vet support for developing farmers
 - 5.1.7 Charge sheets
 - 5.1.8 Animal statistics and animal movement control and animal identification
 - 5.1.9 Legal opinion
 - Legal standing of NAHF
 - Vet services in RSA
 - 5.1.10 FMD control-NAHF support
 - 5.1.11 Feedback of BTB
 - 5.1.12 Accreditation of private veterinarians
 - 5.1.13 Meat safety act
 - 5.1.14 Sanitary and Phyto sanitary strategy
 - 5.1.15 QD
 - 5.1.16 Comments on the Sable Import from Zambia Risk Analysis
6. **MATTERS ARISING FROM THE MINUTES OF THE MEETING HELD ON 20 FEBRUARY 2014**
 - 6.1 Legal Opinion
 - 6.2 Communication with DAFF
 - 6.3 Foot and Mouth Disease
 - 6.4 Avian Influenza
 - 6.5 CEM
 - 6.6 Horse Sickness
 - 6.7 Goals for 2014
7. **STATE AND PRIVATE VETERINARY COMMUNICATION**
8. **ANIMAL MOVEMENT CONTROL**
9. **MEAT SAFETY ACT IMPLEMENTATION**
10. **OBP PROGRESS REPORT**
11. **FINANCIAL REPORT**
12. **ADDITIONS TO THE AGENDA**
13. **AGENDA – MEETING WITH DAFF**
14. **DATE OF NEXT MEETING**
15. **CLOSURE**

- **Agri-Sector Unity Forum (ASUF)**, which is a forum of four agricultural unions, agribusiness and agri-processors. The forum meets to come up with common positions for the advancement of the South African agricultural sector.
- **The Chief Executive Officers' Forum**, which is a meeting of the minister, senior management of DAFF and captains of industries to discuss and plan programmes for the development of the sector. The Unions, agribusiness and agro-processors and the Director General of DAFF make up the Steering Committee of the CEO's Forum, which guides the business and discussions at the Forum.
- **National Agriculture Research Forum (NARF)**. The Forum was established to facilitate consensus and integrate coordination in the fields of research, development, and technology transfer to agriculture in order to enhance national economic growth, social welfare and environmental sustainability.

Currently there are no standing regional structures for the red meat industry other than the Livestock Technical Committee (LTC) of SADC. The sub-committees of the LTC hardly ever meet in-country and so it is difficult to decipher whether or not the industry concerns are carried through to the regional meetings.

The industries liaise on an ad hoc basis on matters of common interest, such as cross-border trade policies. In the early 2000s there was the SALMF, which consisted of industry role players from all the southern Africa (SADC) countries. By 2005, only South Africa, Namibia and Zimbabwe participated in the last meeting. The Red Meat Industry Forum is attempting to resuscitate the Forum, with a first meeting scheduled for September 2014.

AgriSA and AFASA are members of the SACAU and they represent the southern African livestock sector at that level when there are relevant programmes to do so. Recently SACAU held an Annual Conference, with the theme “Can southern Africa Capitalize on the Increasing Global Demand for Livestock Products?” Both AgriSA and AFASA had representatives who deal with livestock issues at the meeting.

The fore-going illustrates that the red meat industry has a number of platforms for liaison with appropriate stakeholders at provincial, national and regional level.

5.2.9 International Livestock Research Institute (Southern Africa & Zimbabwe)

Dr Siboniso Moyo (Regional Representative: Southern Africa) and Dr Godfrey Manyau (ILRI-Zimbabwe) were consulted.

ILRI's main priority is to respond to constraints of smallholder farmers by providing appropriate knowledge and technology. They use innovation platforms at grassroots level to pick up what the constraints are and what each of the relevant actors (e.g. buyers, processors, local government) in the community can contribute to the solutions. The constraints are addressed in an iterative manner, in which ILRI contributes research generated knowledge and technological solutions.

The other platform for interacting with farmers is through on-farm research trials, in which farmers directly host the trials.

ILRI interacts with SACAU at regional platforms such as the SADC - Livestock Technical Committee where each participating organisation provides an update on what it is doing. The second platform is Centre for Coordination of Agricultural Research and Development for Southern Africa (CCARDESA), which is responsible for coordinating research and development in the region and fostering collaboration and synergies with all stakeholders, especially National Agricultural Research Systems (NARS), NGOs, Private Sector, Universities and non- state actors.

At national level, ILRI also uses the innovation platforms approach and works with organisations whose are aligned to the institute's mandate (e.g. Zimbabwe Farmers' Union).

The greatest challenges is that farmers are not producing much, and with limited production, there are limited issues to be raised. It was said that there is a need to educate people on how to find solutions to challenges as well as a need for a leadership that takes up advocacy for some of the challenges. An example was given that even with the bulking tanks, some Milk Collection Centres produce too little milk to justify transport being dispatched to collect the milk to a central processing plant. In such a set-up, leadership should be able to identify alternative markets for such producers. In addition, a high volume of the milk from the smallholder

sector is condemned for high somatic cell count and yet such milk could be further processed into other products for which somatic cell count is not a concern (as is done in India and Kenya).

A point was made that within the livestock sector, there is much complacency amongst the technocrats. It was said that many sit in positions of influence but do not actually use them to push for the required reforms.

5.2.10 BFAP (South Africa)

The Bureau for Food and Agricultural Policy (BFAP) was consulted during the VET-GOV Regional Workshop in Pretoria. It is a research institution whose aim is to facilitate evidence based decision-making in agriculture.

BFAP has developed a number of tools and systems of econometric and simulation models to analyse agricultural commodity markets, look at sustainability of farming systems, unpacking food value chains and understanding consumer behaviour. It also provides agro-industries with analyses of future policy and market scenarios and measures their impact on farm and firm profitability. The Bureau consults with both private sector national and international companies, as well as the national government. It has long-standing partnerships within South Africa and is expanding into the rest of the continent through the newly established Regional Network of Agricultural Policy Research Institutes (ReNAPRI) whose main objective is to build capacity of the National Agricultural Research through collaboration among different institutions. The collaborating universities in this network are from the Democratic Republic of Congo, Kenya, Malawi, Mozambique and Zambia and the network is expanding into other countries.

6. REGIONAL ISSUES THAT WERE RAISED DURING THE CONSULTATIONS

The matters of regional interest that were raised through the consultations with the farmer organisations and stakeholders may be summarised as:

6.1 Production issues

- Learning from each other's experiences (e.g. pig farmers from Lesotho & Swaziland could learn from South African producers).
- Improving farmer skills; provision of farmer training (teach farmers to reduce their costs because they would not make much profits even in lucrative markets if they are not managing the costs of production.)
- Finance to develop local production that is market-oriented.
- Production of drugs and animal feeds are affordable to farmers.
- There should be more collaboration between governments and farmer organisations in addressing production issues.

6.2 Sanitary and phyto-sanitary (SPS) issues

- Standard setting and compliance to standards (e.g. for Mohair from South Africa that is sold through auction floors in Port Elizabeth has to meet the required standards to transit through South Africa as well as those of the destination markets).
- Setting and compliance with disease control standards (e.g. OIE terrestrial animal health code).
- Control of trans-boundary diseases e.g. peste des petits ruminants (PPR), contagious bovine pleuropneumonia (CBPP) and food and mouth disease (FMD).
- Creating an FMD free region.
- Control of African swine fever in the region to enable growth of the pig industry.
- Quality assurance and inspection standards.
- There should be an SPS committee in which representatives of unions sit.
- Improved and increased number of veterinary laboratories and more cooperation amongst the laboratories in the region.

During the regional workshop in April, it was added that lack of trust also contributes to less/delayed trade between countries even when a memorandum of understanding was signed between the trading partners. It was noted that southern African countries do not trust each other and yet expect to be trusted by external markets such as the European Union. It was recommended that regional organisations such as SACAU should intervene in such cases where intra-regional trade is hampered by lack of trust. It was also pointed out that trust could be improved amongst trading partners in the regions if veterinary services were effective in their regulatory functions.

6.3 Market access issues

- Reading market signals and assisting farmers to respond to them.
- Take advantage of each other's comparative advantage (e.g. Botswana strong in beef production, Lesotho is strong in wool sheep production; could learn from each other).
- Better coordination of activities in southern Africa by SACAU and SADC so that farmers can take advantage of the more advanced systems in the region.
- Access to regional markets (e.g. products that cannot be exported to European Union market by Namibian farmers could be exported to regional markets that have less stringent requirements than the EU, provided the products meet the minimum SPS requirements; remove unnecessary trade barriers for intra-regional and intra-continental trade). Consumers and producers should be able to influence the

minimum standards that are set for trading partners.

- The region has strong cattle producing countries (Zimbabwe, Namibia, Botswana, South Africa and potentially Tanzania and Madagascar). These could collaborate to exploit regional markets. However solidarity is still a challenge.
- Build regional brand for some products (where the region has a competitive advantage) and have policies that support that.
- Imposition of import/export levies (e.g. In Swaziland large scale pork producers pay a levy for exports to Mozambique but small-scale do not. This discourages large scale pork production. SACU intervened on the imposition of levies for inputs into Botswana). There should be a platform to discuss levies and their impact on affected industries on either side. This implies dealing with competition and complementarity matters at regional level.
- Regional approach for wool and mohair (e.g. between Lesotho and the Eastern Cape Province of South Africa) could improve penetration of external markets market.
- Enabling sharing of genetic material. The requirements for trading in breeding animals should not be the same as for commercial herds.
- Countries should have reciprocal trade standards for breeding stock.

6.4 Regional forums

- Liaison forums could be used, e.g. SADC Poultry Liaison Forum, where the poultry industries meet and discuss issues which impact can be made (e.g. limiting influx of poultry products from Brazil that do not meet regional SPS standards).
- Collaboration at regional level needs themes; one or two issues that can be handled and concluded within a given time frame.
- Most countries are not self-sufficient in production and are possibly not ready for dealing with trade issues at regional level.
- Identify leaders who can drive the issues with passion. Nurture personal relations.
- Have more interactive meetings at regional level that deal with topics that are relevant for the time.
- Build on existing initiatives (such as the Poultry Liaison Forum).
- Generate and share information for benchmarking regional performance. This could be done SACAU.
- Livestock is generally not perceived as a priority sector by African governments, and hence it is up to farmer organisations to prove that it is.
- Deciding on a position with regards to the proposed SADC Free Trade Agreement in 2015.
- Strengthen internal institutional capacity for countries to deal with the many regional and bilateral issues.
- Cattle rustling at borders – Use the Joint Permanent Commission Defence and Security to handle cross border rustling.
- Advocate for the implementation of the Comprehensive African Agriculture Development Programme, (CAADP), especially that countries increase domestic investment in agriculture (and the livestock sector in particular) so they could build towards self-sufficiency in production.
- SACAU should strengthen commodity associations within unions.

7. THE SOUTHERN AFRICAN CONFEDERATION OF AGRICULTURAL UNIONS (SACAU)

7.1 Evolution over the last 10 years

SACAU was originally formed in 1992 as a loose consultative forum of six farmer organisations from the southern African region. It was formally established in 2003 and appointed its Chief Executive Officer in 2005. Initially, its strategic pillars were to:

- Strengthening the capacity of farmer organisations in the region to effectively address the needs and concerns of their members.
- Afford a platform through which farmers could interact, meet, receive information and exchange views with various stakeholders on agricultural matters.
- Provide information on all farmer organisations in the region through a comprehensive database.

The first strategic workshop was held in 2005 to develop the 2006 – 10 strategic plan, whose major pillars were similar to the above, that is:

- Facilitation of capacity building support to farmer organisations in the region
- Providing a platform for the collective voice of farmers on matters of common concern
- Provision of policy related and other key agricultural information to farmer organisation

One of the major concerns was the limited understanding of trade issues by member organisations despite that some of the trade arrangements were seen to have profound effect on the operations of the farmer organisations in their respective countries. Within that strategy, one of the projects was to strengthen the capacity of national farmer organisations to effectively influence the development and implementation of international trade policies.

By 2005, SACAU had grown to 9 members from six countries.

In November 2010, SACAU revised its strategy once again and came up with what was termed the Strategic Framework (2010 and beyond), which was intended to be an indefinitely framework to be supported by annual work plans and budget. Although this was developed after a more extensive process involving the members, leadership, and staff and cooperating partners, the key pillars remained essentially the same as previous years, namely:

- Influencing public policy (lobbying and advocacy).
- Strengthening capacities of farmers' organisations/members.
- Provision of information to members and stakeholders.

In this period, capacity building of member organisation was a key activity, funded by the IFAD Support to Farmers' Organizations in Africa Programme (SFOAP). Currently the Confederation has 17 members drawn from 12 countries (Table I.1 and Annex I).

In 2014, SACAU revised the strategic document once again, informed by a better understanding of agricultural developments in the region, improved knowledge and understanding of what members were grappling with and what their expectations were, improved understanding of stakeholder expectations and improved understanding of the external environment and emerging issues and opportunities. The strategic pillars did not change but an elaborate plan was developed, informed by the developments mentioned above.

A noticeable change in SACAU in the recent years has been a stronger focus on commodity value chains, commodity organisations, and holistic and inclusive development. With respect to commodity organisations,

SACAU has initiated activities for both the livestock and grain sectors. Within the grains sector SACAU and the Eastern Africa Grain Council (EAGC) with the support from the Technical Centre for Agricultural and Rural Cooperation ACP-EU (CTA) convened a workshop for grain stakeholders on “Promoting the grain industry in Southern Africa through collective action” in February 2014. During the workshop, the stakeholders identified areas of collaboration and established a task team work out how the collaboration could be effected. Similar work was conducted for the livestock sector and is detailed in § 7.2 below.

With the more elaborate work plan, SACAU participates in a number of regional, continental and international meetings with key policy institutions. In the past year, these have included the following:

- Common Market for Eastern and Southern Africa (COMESA)
- African Union (AU) and New Partnership for Africa’s Development (NEPAD) Planning and Coordinating Agency (AU-NPCA)
- United Nations Framework Convention on Climate Change (UNCCC)
- Alliance for Green Revolution in Africa (AGRA)
- Comprehensive Africa Agriculture Development Programme (CAADP)
- World Economic Forum (WEF)
- Technical Centre for Agricultural and Rural Cooperation (CTA)
- Center for the Coordination of Agricultural Research and Development in Southern Africa (CCARDESA)
- United Nations Economic Commission for Africa (UNECA)
- Consultative Group on International Agricultural Research (CGIAR)
- International Food Policy Research Institute (IFPRI)
- International Water Management Institute (IWMI)
- Food, Agriculture and Natural Resources Policy Analysis Network (FANRPAN)
- Forum for Agricultural Research in Africa (FARA)
- AgriCord

7.2 Current livestock related work being undertaken by SACAU

7.2.1 Overview of the livestock sector

In 2013, SACAU commissioned a desk top review of the livestock sector in southern Africa, which examined the size, composition and structure of the livestock in the region and proposed a way for strengthening the sector based largely on value chain development at national and regional levels and increased private sector involvement, leading to greater vertical integration and increased value addition on the livestock industry. A consultative study of key national formations in the livestock sector was also conducted to assess the demand and interest for establishing collaborative arrangements for the livestock sector at regional level. The two studies were followed by a workshop of key role players in August 2013, to discuss the potential for regional cooperation in the livestock sector of the southern Africa.

The main findings from the study and workshop (summarised in § 7.2.2 below) have informed SACAU’s approach to handling the livestock sector.

7.2.2 Main findings and recommendations of the sector overview

- The performance of the livestock sector is poor, largely due to a number of reasons, such as:
 - » Low production and productivity
 - » High input and production costs
 - » High transaction costs
 - » Inadequate support services
 - » Poor infrastructure
 - » Outdated technology

- » Limited public and private sector investment
 - » Prohibitive policies and regulations
 - » Transboundary animal diseases and inhibitory trade standards
 - » Lack of sector organisation and integration
- The main strengths were that there are adequate numbers of livestock for growth, a strong culture of keeping livestock and a well-developed commercial sector in some countries, which could provide leadership and guidance for growing the sector.
 - The main weaknesses of the sector were listed as limitation of animal feed production and rangeland deterioration caused by adverse climatic conditions, a weak culture of trading in livestock, dualistic and disorganised sector with weak and disorganised value chains, low productivity, especially in the smallholder sector, unfavourable disease situation and lack of bargaining power.
 - The opportunities were the growing demand and hence markets for livestock commodities from the regions, changes in trade standards to accommodate developing countries and support from regional structures such as SADC and SACAU.
 - The main threats and challenges were the impact of climate change, limited water resources, competition from cheaper imports and managing diseases of trade importance. Achieving vertical integration that accommodates all interested producers and improving public and private sector investments were also challenges.

It was concluded that there is a role for livestock associations to develop well-organised and integrated value chains at national and regional level for commodities and products with high potential. Their other role was to lobby policy and decision makers in the public and private sectors for the implementation of what is needed to improve the performance of the livestock sector.

From both the desk top study and the consultation of key stakeholders, it was concluded that the main areas for potential collaboration were:

- Influencing international standard setting bodies and trading partners to strengthen regional trade laws
- Regional competitiveness and branding
- Improving regional trade within the SADC region by improving regional trade laws, regulations and policies and regional competitiveness and branding.
- Development of integrated regional value chains and sharing examples of successful regional value chains
- Improving disease control and management
- Production and availability of animal food/feeds and drugs
- Livestock genetic improvement and use of indigenous breeds
- Regional livestock database
- Training of extension personnel on more modern methods of livestock production and management
- Training of veterinarians
- Skills audit and a database of available and scarce skills
- Regional institutions to extend credit to livestock farmers in the region
- Engaging with key players and lobbying and advocacy on common issues
- Providing support to research and sharing of research findings and information
- Improving smallholder producers' access to formal markets

A number of means of fostering regional integration were proposed and a task team set up to explore the possibility and propose a business plan on the way forward. It was recommended that the SACAU Secretariat could be considered as the platform for coordinating regional cooperation.

The studies went on to recommend pilot exercises with regards to regional cooperation for commodities, and these included the following:

- Development of one or two selected regionally integrated value chains (e.g. wool in Lesotho and Eastern Cape; improving trade in breeding stock and semen)
- Improving production and availability of animal feeds
- Capacity building of smallholder farmers
- Improve animal disease control
- Influencing international standard setting bodies and potential trading partners

The suggested high potential value chains for testing the interventions were hides/skins and leather, wool and mohair, and red meat. Dairy and chicken value chains were provided as secondary possibilities.

The August workshop

The July 2013 workshop was attended by key actors in the livestock industries of the Southern African countries, namely:

- Red Meat Industry Forum (South Africa)
- National Emergent Red Meat Producers' Organisation (NERPO, South Africa)
- South African Poultry Association (SAPA, South Africa)
- South African Veterinary Association (SAVA, South Africa)
- National Wool Growers' Association (NWGA, South Africa)
- Botswana Meat Commission (BMC, Botswana)
- Ghanzi Beef Producers' Association (Botswana)
- Botswana Veterinary Association (BVA, Botswana)
- National Livestock Producers' Association of Malawi (NALIPAM, Malawi)
- Poultry Industry Association of Malawi (PIAM, Malawi)
- ZAMBEEF (Zambia)
- Poultry Association of Zambia (PAZ, Zambia)
- Dairy Association of Zambia (DAZ, Zambia)
- Pig Industry Board (PIB, Zimbabwe)
- Zimbabwe Association of Dairy Farmers (ZADF, Zimbabwe)
- Council of Veterinary Surgeons of Zimbabwe (CVSZ, Zimbabwe)
- Livestock Meat and Advisory Council (LMAC, Zimbabwe)
- Tanzania Veterinary Association (TVA, Tanzania)
- Meatco (Namibia)
- Namibia Meat Board (Namibia)
- Livestock Producers' Organisation (LPO, Namibia)

The discussion of the workshop centred on the following:

- What are the broad main issues/ challenges that different value chain actors are facing in each of the countries of Southern Africa?
- Which of the key broad issues identified in (a) above could be collectively addressed at the regional level
- What structured mechanisms could be considered to enable a collective approach to happen

The outputs were virtually the same as in the desk top and consultative studies. In fact they were quite similar to the outputs of the VET-GOV workshop on development of support strategy and action plan for livestock farmers' associations and apex organisations in southern Africa, which was held on 28 -30 April 2014 in Pretoria. The list of policy issues that were recommended for national and regional level at the workshop are

listed in Annex 10.

At the SACAU workshop, a task team was set up to amalgamate all the outputs from the SACAU consultations and propose a business plan for a region livestock platform.

7.2.3 Way forward for livestock matters in SACAU

Conference

SACAU held a livestock conference with the theme “Can southern Africa capitalize on the increasing global demand for livestock products”

Some of the key messages out of the conference presentations and discussions were noted as the following:

Outlook for livestock products

- There will be an exponential increase in the demand for food in the coming decades and is agriculture positioned to grow more than any other sector (Figure 3.9).
- Pork and poultry sectors will grow because of surpluses in maize production while the beef herd in the world is declining as there is less grass. Improvements in beef production would therefore be based on increase in efficiency of production, possibly to multiple births per calving.
- Africa is where the greatest potential is for increased production in agriculture because of the large tracts of under-utilised land, under-utilised water resources and marginal productivity of the agricultural sector (Annex 7; Table 3.2).
- Farmers have no say over prices, they can only increase productivity and reduce production costs in order to be profitable.
- Technology and management of information will need to be embraced. Harness potential of science and technology.
- Size matters, aggregation is the way to go. Organised business is the way forward.
- Keep markets as free and transparent as possible, only controls should be for sanitary and phyto-sanitary reasons and must be fair.
- A managed free market system perhaps is more practical in Africa.

Towards a common regional agenda for livestock

- Common priority issues affecting the sector have been identified and these include: animal health, trade issues, research & development and productivity issues.
- There is a need a platform for learning and dealing with these common issues.
- A business plan for a regional platform has been developed.
- Access to finance is a key issue. SACAU is addressing access to finance.

African Socio-Cultural beliefs

There are strong socio-cultural connections including gender issues contribute to slow progress in improving productivity of livestock.

- There is an opportunity to change, but this will happen gradually. It will be driven by use of improved technologies and could/should preserve some of the cultural values.
- Farmers’ organisations should facilitate this change.

Animal Health and Trade Standards

- Address serious skills shortage especially in government (e.g. veterinarians and para-veterinarians).

- The region should advocate for the harmonisation of sanitary, zoo-sanitary and food safety standards and regulations.
- The region should support principle of equivalence (Article 4 of WTO SPS Agreement) was supported in resolution at SADC SPS Annual General Meeting in Gaborone in January 2014. SACAU should follow up the implementation of the SADC SPS Protocol.
- Use scientific evidence to provide assurance of the safety of traded commodities.
- Improve negotiating power and solidarity in SACAU.
- Provide training and information to farmers.

Animal Health and Technology

- Deliver practical solutions to real problems to ensure there will be uptake.
- Technology advances exist but must be applied.
- SACAU to look into the possibility of joining CCARDESA
- Increased research and production of vaccines that are stable and do not need stringent cold chain protocols.

Trade and Investment

- Each country should have accurate livestock recording systems e.g. improve production information collated through Livestock Information Management Systems (LIMS).
- Focus on improving productivity across the board as all countries are net importers.
- Harness regional integration by reducing non-trade barriers.

Climate Change

- Each country should have a plan for mitigation and adaptation to climate change.
- Adopt climate smart livestock systems, taking into cognisance the social dimensions.
- Address challenge of forest fires and their impact on climate change.
- Participate in national dialogue and document and share best practice.

Message from Namibia

The NAU and NNFU informed the conference that they were faced with a major crisis in that the trading patterns that developed over 100 years ago, where cattle were marketed on the hoof in southern Africa, are now unilaterally closed by South Africa. This could result in the destruction of the livestock industry in Namibia. They requested SACAU to assist them by facilitating high level meetings between South Africa and Namibia.

Livestock Platform

SACAU's business plan for a proposed regional livestock platform will be shared with relevant farmer organisations from the region on 8 July 2014.

7.3 Funding of SACAU

SACAU's membership fees were 1% of the organisations R33 million total income in the past financial year. The rest of the funding is from project specific grants. It is therefore likely that how much focus SACAU maintains on the livestock sector will depend on the available funding and possibly the innovativeness of the member organisation's to keep the work going. (E.g. if a regional platform is established, it need not rely solely on donor funding for its continuity). SACAU has indicated that it would not necessarily employ staff with livestock expertise in its complement but rather draw on the expertise of member organisations, and thus minimises the overhead costs of its livestock projects.

8. SUMMARY OF MAJOR FINDINGS AND RECOMMENDATIONS

8.1 Summary of findings

The summary statements below are intended to capture the key findings as discussed in Chapters 4 – 7:

- Although southern Africa has substantial land and animal resources, productivity of the livestock sector is generally low in the sub-region. Consequently most of the countries are net importers of livestock (except Botswana and Namibia beef), livestock products and livestock feed resources (except Tanzania and Zambia). Meanwhile, projections are that food production will have to double in the next 30 -40 years; and most of this increase will take place in the continent and sub-continent specifically, where production resources are still marginally utilised. This suggests that much effort needs to be dedicated to overcoming impediments to production, especially in the smallholder farming systems which dominate the region. For smallholder farmers it was suggested that aggregation was the only way they can be competitive in the mainstream markets.
- The region is said to have restrictive trade laws, policies and regulations which impede intra-regional flow of products, even amongst countries that have trade agreements.
- Some countries have endeavoured to grow their livestock industries (especially poultry and dairy) using protectionist policies and providing financial support to start off the industries (e.g. poultry in Botswana, Mozambique and Malawi). It has also recommended that control boards may be useful for providing stable markets for the fledgling industries because they offer guaranteed prices and, in times of a glut can absorb excess for resale later or to other markets. However strong advice provided during the SACAU livestock conference was to keep markets as free and transparent as possible, and that the only controls should be for sanitary and phyto-sanitary reasons.
- The region has a good distribution of producer organisations in each country, in terms of coverage of the livestock commodities and age of the organisations. This offers an opportunity of producer organisations learning from each other across countries and the age gap (i.e. experience) within the region.
- The established producer organisations had capacity to, focussed on and preferred to handle all matters related to their industries and delegate cross-cutting issues to the unions (if they were well-established). They were well-managed, could generate and/or source the information that they required for decision making, lobbying and advocacy. They had adequate resources to perform most of their major functions and even provided assistance to their governments in resolving critical threats to the industries (e.g. SAPPO and stamping of ASF, NAHF and compiling the South African dossier for application for FMD free status and LPO in monitoring of the codon and border fences).
- Producer organisations of smallholder farmers were able to articulate their constraints to production and market access but were not equipped with adequate information and lobbying and advocacy skills to enable them to put up convincing cases of their challenges and practicable solutions. In most instances the solutions were that “government should ...” However, the work that was conducted by Heifer International in Malawi and ILRI in the region demonstrated that perceptible growth in lobbying and advocacy and in addressing constraints to production and market access could be achieved through interventions at grassroots level to empower farmers and their leaders with knowledge and skills to deal with their challenges. A point to note is that some of the producer organisations were not linked to any unions, and it could be advisable to strengthen them in order that they are not only able to deal with their issues but are able to link up to existing unions and require from them the services that are due to them.
- Like the producer organisations, unions ranged from the long-established and well-resourced ones to fledgling ones that are still grappling with setting up their internal structures, and do not yet have adequate sources of well-researched evidence to back up the lobbying and advocacy that they perform. The established unions seemed to have fairly defined roles with respect to the services that they offer their members (livestock producer organisations). There was also a fairly good understanding of the issues that the unions

should handle at national level and what should be delegated to regional level (e.g. Annex 10).

- There have been a number of suggestions on matters for regional collaboration with respect to the livestock industries, which indicates that there is indeed a need and a willingness to tackle matters at that level. SACAU has already made significant progress in preparing to deal with livestock issues at regional level by conducting consultations on whether or not there is a need for such an intervention and if so in what form. SACAU is well-placed to handle regional livestock issues because its consultations did not only cover livestock role players from its 17 member organisations only but from across the entire region. The issues that have emanated from the consultations are broad enough and will benefit all producers regardless of whether or not they are SACAU members. Furthermore SACAU has built a strong capacity and networks to lobby at regional and at international level, which the livestock platform (whatever form it takes) could take advantage of.
- Within the southern African countries there were a number of support institutions for strengthening and supporting farmer organisations that could be worth replicating/stretching across the region. These include institutions that were making effort to organise farmers and build their capacity for participating in the mainstream markets as well as for lobbying and advocacy (e.g. Heifer International, ILRI and Madagascar's Directorate for Professionalisation, Zim-ACP); and those assisting farmer organisation to access scientific-based information for decision-making and lobbying and advocacy (e.g. Heifer International, ILRI, Zim-ACP, LMAC and BFAP), and national platforms for engaging on livestock issues (e.g. the livestock forums of Zimbabwe and Namibia, the RMIF and NAHF of South Africa).
- The VET-GOV Policy Hubs seemed a good and welcome platform to bring together concerned parties in an institutional arrangement to ensure effective and efficient veterinary services. In some instances, however, the Policy Hubs' activities were not well-mainstreamed into the ministries such that they seemed to be an additional project than an effective centre for coordination. The VET GOV Policy Hubs seemed to work better where they were coordinated by senior officials in the ministries, who could easily delegate staff and resources to the tasks at hand.

8.2 Proposed strategies and required capacity to implement the strategies

8.2.1 National level

- 1. Building the production capacity, especially of smallholder farmers.** Scale up use of approaches such as the innovation platforms that are employed by ILRI and other CGIAR institutions and the training that is provided by Heifer International, to build capacity for identification and resolution of production and market access challenges. This should target existing smallholder producer organisations who have shown initiative and drive but lack of capacity to resolve their challenges (e.g. Piggy Farmers' Association and Lesotho Dairy Farmers' Association in Lesotho, Philani Poultry Association, Luyengo Dairy Farmers' Association and Power Team in Swaziland, and members of MPE in Madagascar³).

Learning amongst countries within the region should be encouraged and facilitated.

- 2. Training of local farmer organisations in leadership, governance, policy formulation and analysis, and effective lobbying and advocacy.** The Zim-ACP and Heifer International type of training could be coordinated and done for farmer leaders (perhaps at regional level). The Food, Agriculture, Natural Resources and Policy Analysis Network (FANRPAN) is another institution that could be engaged to provide training, specifically in policy analysis and formulation.

Furthermore, farmer organisations should be encouraged/assisted to establish linkages with research institutions such as BFAP, Agriculture Research Council (ARC) of South Africa, the National Agricultural

³NB. Any examples that are provided in this section are by no means intended to be an exhaustive list of possibilities, but rather an illustration based on the organisations and institutions that were consulted in this study.

Marketing Council (NAMC) of South Africa and the universities for the collection, collation and analysis of production and marketing trends data. Some of the networks (e.g. with ReNAPRI) could be established through AU-IBAR. Where feasible, livestock industries should establish an institution similar to the LMAC, which would conduct the research for all the industries, and thus reduce the overhead costs of attempting to do such research in-house.

- 3. Training of farmers and government officials on the latest techniques and skills specifically related to the sector** e.g. artificial insemination (AI) and embryo transfer (ET) technologies. A regionally coordinated programme for such training of trainers could be established for extension officers and selected technical persons in farmer organisations.
- 4. Strengthening of veterinary and veterinary laboratory services and facilities.** AU-IBAR should assist the farmer organisations (through the national policy hubs) to influence the training of veterinarians and para- veterinarians that are specific to the sector needs (e.g. poultry in Botswana, all veterinarians in Malawi). AU-IBAR should assist the farmer organisations to lobby that governments strengthen the capacity of local veterinary laboratories as well as share laboratories with other laboratories with comparative advantage in the region (e.g. Botswana Vaccine Institute is regarded to be highly competitive in FMD- vaccines and so could be supported to be the regional centre for such vaccines).
- 5. Coordination of producer forums at national level and collation of national information.** Raised platform of livestock within unions (e.g. the livestock forums of Zimbabwe and Namibia; the NAHF of South Africa) could be established as platforms for discussing and resolving common industry specific issues through internally generated solutions or lobbying and advocacy.

8.2.2 Regional level

At the end of the VET-GOV workshop in South Africa, all participants were satisfied with the proposal of SACAU as the coordinator of regional livestock issues given the progress that the organisation had made in this space.

The recommended regional strategies were as follows:

- 1. Training of farmer organisation leaders on regional trade/SPS and production issues.** This could be facilitated by AU-IBAR through SACAU and, if possible in collaboration with the SADC Secretariat who have implemented such training workshops under the Regional Economic Integration Support (REIS) funded by the European Union.
- 2. Establishment and coordination of a regional livestock platform, collation of regional information and coordination of regional best practices.** This would require strengthening the capacity of SACAU to handle this aspect, and SACAU has indicated that it would most likely draw expertise from its member organisations to perform some of these functions.

The regional interactions should be on one or two issues that are not contentious and on which common ground could be reached in reasonable time without diminishing interest in the meetings. SACAU could start off with existing regional forums such as the poultry, dairy and facilitate the establishment of those that are not there yet or are struggling (e.g. SALMF) or establish on forum for all commodities. The decision on this matter will be finalised in a regional meeting of 8 July 2014.

- 3. Provision of current livestock information on production trends in the region, available**

markets and their viability (cost benefit analysis). SACAU should be an information hub for benchmarking and informed lobbying on bilateral or multilateral trade issues within and outside the region. SACAU could perform this function, supported by inputs from member organisations and institutions such as ReNAPRI, and regional bodies such as SDAC and COMESA.

- 4. Enhance and promote competence of professionals in the sector.** SACAU should maintain a database of available and scarce skills in the sector. The regional organisation and its member organisations in the region could lobby national education systems and funders of education and training (national, regional and international) to target the scarce skills in their training programmes (both in the development of the training curriculum and actual provision of training). This will be one of the critical steps in preparing the sub-continent to meet the levels of production that are expected in the next 30 -40 years.
- 5. Lobbying and advocacy for livestock at regional level.**
 - SACAU should provide input into relevant regional structures (e.g. SADC Food, Agriculture, Natural Resources and Environment Ministerial Committee, SADC Livestock Technical Committees and CCARDESA).
 - SACAU to encourage active SADC LTC sub-committees in each of the countries, with industry participation.
- 6. Resource mobilisation.** AU-IBAR, SACAU and national association could collaborate to mobilise resources that are required to perform all the above-mentioned strategies.
- 7. SACAU should be strengthened with both human and financial resources to handle livestock specific issues** as suggested above. While the regional organisation is content with sourcing of expertise from its member organisations, it would prudent for the AU-IBAR VET-GOV and related programmes to appoint a member of staff specifically dedicated to initiating and driving this work for at least a three year period, with a specific mandate for a sustainable exist strategy.

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ANNEXES

Annex I: Members of SACAU and their contact details

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ANNEX 3. QUESTIONS FOR NATIONAL LIVESTOCK FARMER ORGANISATIONS

A. General information about the organisation

1. What is the name of the organisation?
2. When was it founded?
3. What is the location and address?
4. Names of key persons and their responsibilities in the organisation?
5. Who are the members and what is their profile (request reports of membership profile if available)?
6. How many active members are there?
7. How has the membership changed over the past 10 years (number, distribution and profile of members)?
8. What have been the major reasons for the changes in membership if any?
9. What are the main objectives of the organisation and what are the strategies for achieving the objectives (request strategic plan documents if available)? Have these objectives changed in the last 10 years, and if yes please explain.
10. What services are offered to members? Have the services evolved over the last 10 years and if yes, please explain.

B. Capacity of the organisation

1. What is the minimum capacity for the organisation to meet its mandate (and provide the required services to members)? Provide detailed of minimum required versus what is available for:
 - a. Governance & leadership
 - b. Organisational structure
 - c. Organisational skills, from strategic planning through to programme development and execution
 - d. Human resources
 - e. Systems and infrastructure
 - f. Resource development

2. Which of the above (in B1) is the greatest impediment to the execution of the organisations core mandate?
3. What do you see as the possible ways to improve the organisation's capacity (if need be)?
4. What have been the organisation's major successes in providing the services/ meeting its objectives over the last 10 years?
5. What were the key drivers for the successes in B4?
6. What have been the organisation's major weaknesses in providing services to members over the last 10 years?
7. What have been the key reasons for the weaknesses in B6?
8. What are the sources of funding for the activities of the organisation?
 - a. Members statutory meetings
 - b. Member services
 - c. Institutional capacity
9. Have these sources of funding changed over the past 10 years (explain)?

C. Strategic relationships

1. Identify and describe linkages/relationships with other organisations (public, private, bilateral, international, etc.)
 - a. Other farmer organisations
 - b. Organisations in the livestock value chain
 - c. Public sector institutions
 - d. Support organisations
 - e. Donor organisations
 - f. Others (specify)
2. What has been the impact of each of the linkages in C1 on the organisation's ability and capacity to meet the organisation's main objectives?

ANNEX 4. QUESTIONS FOR NATIONAL AND REGIONAL FARMERS' ORGANISATIONS

A. General information about the organisation

1. What is the name of the organisation?
2. When was it founded?
3. What is the location and address?
4. Names of key persons and their responsibilities in the organisation?
5. Who are the members and what is their profile (request reports of membership profile if available)?
6. How many active members are there?
7. How has the membership changed over the past 10 years (number, distribution and profile of members)?
8. What have been the major reasons for the changes in membership if any?
9. What are the main objectives of the organisation and what are the strategies for achieving the objectives (request strategic plan documents if available)? Have these objectives changed in the last 10 years, and if yes please explain.
10. What services are offered to members? Have the services changed over the last 10 years and if yes, please explain.
11. What is the minimum capacity for the organisation to meet its mandate (provided the required services

to members)? Provide details of minimum required versus what is available for:

- a. Governance & leadership
- b. Organisational structure
- c. Organisational skills, from strategic planning through to programme development and execution
- d. Human resources
- e. Systems and infrastructure
- f. Resource development

12. What are the sources of funding for the activities of the organisation?

13. Have these sources of funding changed over the past 10 years (explain)?

14. Are you satisfied with the way the organisation has delivered on its major objectives in the past 10 years? Explain.

B. Livestock focus and capacity to handle livestock issues

1. Do they have any strategies, programmes and services that are specifically for the livestock sector?
2. Explain why livestock is/is not a focus point for the union in terms of:
 - a. Understanding of the role and importance of livestock in the national economy (any species of particular importance)?
 - b. The livestock value chain and linkage with other agricultural sectors.
 - c. Contribution to GDP, employment and other national priorities.
 - d. Major issues that need to be dealt with to improve the performance of the livestock industry?
3. Does the organisation have the capacity to handle livestock issues? Explain in terms of:
 - a. Organisational structure
 - b. Expertise that is available/accessible to the organisation
 - c. Strategic relationships
 - d. Funding and other resources that is available/accessible to the organisation
4. Which of the above (B3) is the greatest impediment to inclusion of and supporting livestock related issues in the organisation's strategy and programmes.
5. What do you see as the possible ways to improve the organisation's capacity (if need be) for handling livestock related issues?
6. What have been the organisation's major successes in providing the services/ meeting its objectives over the last 10 years? Any success that are specific to livestock matters?
7. What were the key drivers for the successes in B6?
8. What have been the organisation's major weaknesses in providing services to members over the last 10 years? Any specific weaknesses in relation to livestock matters?
9. What have been the key reasons for the weaknesses in B8?

C. Linkages

1. Identify and describe linkages/relationships with other organisations (public, private, bilateral, international, etc.)
 - a. Other farmer organisations
 - b. Organisations in the livestock value chain
 - c. Public sector institutions
 - d. Support organisations
 - e. Donor organisations

- f. Others (specify)
2. What has been the impact of each of the linkages in CI on the organisation's ability and capacity to meet its objectives, and more specifically to handle livestock related matters.

ANNEX 5. QUESTIONS FOR GOVERNMENT OFFICIALS IN LIVESTOCK PRODUCTION, VETERINARY SERVICES AND LIVESTOCK SECTOR SUPPORT SERVICES

A. General information about the organisation

1. What is the name of Department/Division?
2. When was it established?
3. What is the location and address?
4. Names of key persons and their responsibilities in Department/Division?
5. What are the main objectives of the Department/Division and what are the strategies for achieving the objectives (request strategic plan documents if available)? Have these objectives changed in the last 10 years, and if yes please explain.

B. Details of planning and relations with farmer organisations

1. Is there a database of livestock numbers and trends in the Division/Department/Ministry?
2. What are the trends in the livestock sector? What are the perceived challenges and opportunities?
3. Are there any national strategies for the livestock sector? Have these objectives changed in the last 10 years, and if yes please explain.
4. What informs the national strategy for livestock and who is involved in its development? Are farmer organisations specifically invited and, if so to what extent do they participate in planning for the livestock sector?
5. Could farmer organisations play an improved/increased role in the handling of livestock matters. If so how and what could they do.
6. Does the Ministry/Department/Division have a structured plan for engaging with farmer organisations or it is on an ad hoc basis?
7. What is the Ministry/Department/Division's general perception of farmer organisations?

C. Linkages

1. Identify and describe linkages/relationships with other organisations (public, private, bilateral, international, etc.)
 - a. Other farmer organisations
 - b. Organisations in the livestock value chain
 - c. Other government Ministries/Department/Divisions with a mandate for livestock

ANNEX 6. OTHER INSTITUTIONS RECOMMENDED FOR INTERVIEWS

Questions along similar lines to those that are outlined in annexes 3 – 5 above will be compiled based on the nature of the organisation.

ANNEX 7. SLAUGHTER RATES OF CATTLE, GOATS, SHEEP, PIGS AND CHICKENS OVER A 10 YEAR PERIOD IN THE 15 SOUTHERN AFRICAN STATES (FAOSTAT, 2014).

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Cattle										
Angola	12	12	12	11	12	12	13	13	13	13
Botswana	8	9	8	8	8	8	8	9	9	9
DRC	11	11	11	11	11	11	11	9	9	9
Lesotho	11	12	12	11	12	13	13	13	13	13
Madagascar	11	11	11	11	11	12	12	13	13	13
Malawi	27	27	27	27	28	26	25	28	27	27
Mauritius	160	177	201	202	118	172	166	133	182	164
Mozambique	10	10	9	9	10	9	10	10	9	10
Namibia	9	8	5	6	6	6	6	6	6	6
Seychelles	10	11	10	10	10	10	10	10	10	10
South Africa	19	20	20	23	22	21	21	21	21	21
Swaziland	0	0	0	0	0	0	0	0	0	0
Tanzania	14	14	14	14	14	14	14	14	13	14
Zambia	16	15	14	13	15	16	14	15	14	14
Zimbabwe	8	9	9	9	9	9	9	9	9	9
Goats										
Angola	30	30	30	30	30	30	30	30	30	29
Botswana	23	23	23	23	27	24	25	24	27	28
DRC	41	41	41	40	40	40	40	39	39	40
Lesotho	31	33	30	21	28	28	28	31	32	33
Madagascar	33	33	34	34	34	51	50	50	50	50
Malawi	64	64	52	64	64	64	73	64	66	67
Mauritius	28	38	43	49	35	32	37	32	32	27
Mozambique	42	41	41	41	41	41	41	41	41	42
Namibia	20	21	14	15	15	15	15	15	15	25
Seychelles	35	35	35	36	36	36	36	36	36	36
South Africa	35	35	36	35	35	35	35	35	35	32
Swaziland	0	0	0	0	0	0	0	0	0	37
Tanzania	21	21	21	20	20	20	20	20	19	20
Zambia	32	32	32	32	32	32	32	32	32	31
Zimbabwe	37	37	37	37	37	36	37	40	41	41
Sheep										
Angola	25	25	25	25	25	25	25	25	25	25
Botswana	43	72	70	76	51	46	44	47	45	46
DRC	31	31	31	31	31	31	31	31	31	32
Lesotho	37	36	36	60	40	33	34	34	34	34
Madagascar	32	32	32	32	32	32	32	32	32	32
Malawi	43	43	31	43	43	43	43	43	43	43
Mauritius	31	46	39	28	35	34	34	34	41	41
Mozambique	38	40	38	36	40	28	34	36	37	34
Namibia	15	14	20	22	24	25	25	24	24	24
Seychelles	0	0	0	0	0	0	0	0	0	0
South Africa	24	24	24	25	21	23	25	24	22	23
Swaziland	0	0	0	0	0	0	0	0	0	62

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Tanzania	24	27	27	27	27	27	28	28	27	30
Zambia	27	27	27	27	27	27	27	27	27	27
Zimbabwe	8	8	9	9	9	8	9	8	8	9
Pigs										
Angola	53	50	54	49	49	49	49	49	50	50
Botswana	150	48	65	75	66	110	97	101	98	95
DRC	56	56	56	56	56	56	56	56	55	54
Lesotho	124	53	69	52	84	204	89	95	94	90
Madagascar	51	52	32	56	56	57	57	57	57	57
Malawi	95	61	112	125	96	104	121	111	124	136
Mauritius	92	97	93	64	77	88	61	39	49	78
Mozambique	142	109	109	165	105	105	138	116	118	98
Namibia	107	100	113	111	110	118	115	115	114	115
Seychelles	104	120	111	122	116	153	146	135	98	119
South Africa	118	120	118	119	121	140	155	151	162	166
Swaziland	0	0	0	0	0	0	0	0	0	0
Tanzania	71	71	70	70	70	70	70	70	70	71
Zambia	76	70	71	56	55	57	74	73	72	72
Zimbabwe	89	88	87	87	87	87	87	89	89	89
Chickens										
Angola	127	128	124	121	124	125	125	125	125	112
Botswana	164	178	130	131	146	173	170	169	160	164
DRC	89	89	89	89	89	89	89	89	89	89
Lesotho	272	313	292	306	314	314	311	398	402	400
Madagascar	185	185	183	184	183	180	180	178	176	175
Malawi	96	135	128	81	111	154	169	169	170	165
Mauritius	286	286	286	286	286	284	294	298	299	295
Mozambique	145	139	143	140	142	144	138	138	140	138
Namibia	227	263	253	252	327	282	286	284	286	292
Seychelles	20	14	15	16	16	15	11	10	12	12
South Africa	413	407	511	503	532	528	528	530	527	528
Swaziland	329	231	225	158	161	153	153	154	153	153
Tanzania	168	180	180	178	186	188	178	181	179	177
Zambia	122	122	122	122	122	122	121	121	119	121
Zimbabwe	146	154	167	166	165	166	166	164	162	159

ANNEX 8. LIVE ANIMAL IMPORTS AND EXPORTS FROM THE SOUTHERN AFRICAN STATES (2004 – 2013;TRADE MAP 2014).

Annex 8a. Value of live animal imports (US\$ '000)

Importer	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Africa	\$14 134	\$14 741	\$28 136	\$28 724	\$21 456	\$15 935	\$32 741	\$35 388	\$31 996	\$125 461
DRC	\$578	\$526	\$571	\$3 695	\$7 272	\$4 205	\$7 276	\$9 428	\$11 002	\$12 781
Mauritius	\$12 133	\$11 726	\$10 796	\$10 232	\$16 090	\$13 264	\$15 551	\$20 204	\$26 309	\$12 605
Angola	\$1 597	\$3 105	\$1 086	\$6 563	\$11 454	\$7 779	\$5 028	\$5 690	\$15 590	\$12 589
Zambia	\$611	\$998	\$604	\$1 113	\$2 439	\$1 257	\$2 144	\$2 501	\$5 019	\$6 939
Zimbabwe	\$868	\$906	\$1 026	\$1 979	\$1 752	\$6 908	\$1 578	\$12 018	\$6 765	\$6 056
Mozambique	\$2 759	\$14 442	\$2 008	\$1 919	\$2 506	\$1 801	\$1 485	\$1 866	\$1 730	\$5 803
Botswana	\$3 765	\$4 517	\$3 254	\$5 073	\$6 443	\$6 813	\$8 375	\$5 830	\$6 265	\$5 012
Namibia	\$2 899	\$3 003	\$4 290	\$4 551	\$6 246	\$10 563	\$7 101	\$2 680	\$5 022	\$4 268
Lesotho					\$1 855	\$3 315	\$2 368		\$24	\$3 972
Swaziland	\$14 282	\$13 238	\$4 939	\$4 742	\$6	\$15	\$3	\$2	\$9	\$2 645
Tanzania	\$960	\$1 056	\$423	\$1 285	\$2 497	\$1 115	\$2 625	\$1 480	\$1 567	\$2 038
Malawi	\$340	\$639	\$610	\$563	\$967	\$1 164	\$1 457	\$802	\$1 847	\$1 784
Madagascar	\$242	\$1 627	\$2 183	\$422	\$1 994	\$699	\$1 413	\$2 307	\$2 788	\$1 661
Seychelles		\$7	\$4		\$59	\$1	\$1	\$17	\$403	\$62
World	\$11 050 914	\$13 038 584	\$14 734 206	\$15 906 630	\$17 336 380	\$17 157 302	\$19 281 747	\$20 806 721	\$22 221 237	\$22 154 807
SADC Aggregation	\$55 168	\$70 531	\$59 930	\$70 861	\$83 036	\$74 834	\$89 146	\$100 213	\$116 336	\$203 676

Annex 8b. Value of live animal exports (US\$ '000)

Exporters	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Namibia	\$79 959	\$98 988	\$96 399	\$98 606	\$58 554	\$82 563	\$127 514	\$149 106	\$83 332	\$113 010
South Africa	\$15 961	\$16 195	\$12 376	\$26 249	\$32 882	\$31 106	\$31 513	\$32 448	\$37 716	\$49 652
Mauritius	\$22 267	\$29 780	\$25 892	\$26 657	\$35 247	\$26 076	\$27 534	\$23 248	\$20 332	\$18 246
Botswana	\$12	\$4 320	\$803	\$95	\$497	\$55	\$128	\$11 275	\$3 653	\$4 895
Zimbabwe	\$1 193	\$259	\$2 842	\$2 520	\$695	\$1 227	\$2 586	\$1 768	\$1 997	\$2 168
Zambia	\$1 239	\$959	\$435	\$17 717	\$939	\$1 370	\$1 498	\$1 302	\$1 674	\$1 924
Tanzania	\$1 073	\$1 450	\$1 192	\$1 258	\$1 511	\$1 500	\$653	\$567	\$516	\$1 126
Lesotho					\$119	\$82	\$120		\$0	\$628
DRC	\$2 215	\$1 876	\$224	\$121	\$82	\$187	\$277	\$82	\$128	\$350
Madagascar	\$442	\$450	\$334	\$285	\$374	\$258	\$202	\$252	\$550	\$206
Malawi	\$27	\$29	\$20	\$177	\$167	\$117	\$172	\$160	\$19 699	\$190
Swaziland	\$2 228	\$1 153	\$1 633	\$583	\$1 398	\$451	\$179	\$9	\$39	\$176
Mozambique	\$342	\$490	\$649	\$1 540	\$1 415	\$347	\$184	\$335	\$180	\$120
Seychelles		\$27	\$63		\$19	\$71	\$171	\$168	\$199	\$107
Angola	\$68	\$17	\$10	\$7	\$14	\$2	\$1	\$3	\$12	\$4
World	\$11 300 448	\$13 111 842	\$14 579 417	\$16 034 777	\$17 834 536	\$17 622 650	\$18 801 089	\$21 239 823	\$22 026 755	\$21 715 744
SADC Aggregation	\$127 026	\$155 993	\$142 872	\$175 815	\$133 913	\$145 412	\$192 732	\$220 723	\$170 027	\$192 802

ANNEX 9. MEAT AND EDIBLE OFFAL IMPORTS AND EXPORTS FROM THE SOUTHERN AFRICAN STATES (2004 – 2013; TRADE MAP 2014).

Annex 9a. Value of meat and edible offal imports (US\$ '000)

Importers	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Angola	\$146 056	\$191 676	\$269 065	\$349 534	\$510 269	\$412 805	\$506 903	\$749 890	\$836 194	\$853 576
South Africa	\$194 828	\$267 124	\$310 836	\$358 909	\$295 421	\$291 681	\$362 691	\$548 924	\$596 383	\$639 377
DRC	\$36 731	\$44 181	\$51 566	\$75 684	\$80 240	\$93 806	\$107 323	\$131 611	\$143 583	\$139 422
Mauritius	\$28 440	\$26 759	\$30 412	\$34 598	\$42 196	\$37 685	\$47 714	\$52 759	\$52 846	\$50 463
Lesotho					\$26 988	\$50 300	\$34 764	\$177	\$19	\$44 153
Namibia	\$31 446	\$34 969	\$35 794	\$41 243	\$69 025	\$86 915	\$84 732	\$87 024	\$57 200	\$35 716
Mozambique	\$6 738	\$8 974	\$10 195	\$8 423	\$11 279	\$12 865	\$8 935	\$16 662	\$25 109	\$33 360
Swaziland	\$16 748	\$15 103	\$10 173	\$9 531	\$1 210	\$3 112	\$2 980	\$4 744	\$221	\$16 025
Seychelles		\$5 281	\$9 129		\$10 867	\$6 332	\$8 552	\$12 024	\$10 791	\$14 342
Botswana	\$3 727	\$2 985	\$3 079	\$4 798	\$8 437	\$11 121	\$15 952	\$16 280	\$14 108	\$13 050
Zimbabwe	\$1 824	\$971	\$834	\$1 373	\$1 925	\$31 835	\$23 661	\$14 339	\$15 537	\$7 700
Tanzania	\$1 565	\$1 900	\$1 550	\$421	\$2 916	\$3 534	\$2 745	\$7 738	\$6 477	\$6 941
Zambia	\$60	\$413	\$189	\$739	\$1 367	\$1 439	\$2 556	\$6 222	\$12 475	\$5 328
Malawi	\$337	\$106	\$84	\$103	\$467	\$751	\$462	\$103	\$504	\$1 119
Madagascar	\$46	\$88	\$93	\$218	\$2 821	\$126	\$3 409	\$3 101	\$128	\$210
World	\$55 688 475	\$62 832 759	\$66 570 659	\$77 537 788	\$94 171 514	\$87 785 530	\$94 294 355	\$111 051 146	\$112 231 340	\$119 056 973
SADC Aggregation	\$468 546	\$600 530	\$732 999	\$885 574	\$1 065 428	\$1 044 307	\$1 213 379	\$1 651 598	\$1 771 575	\$1 860 782

Annex 9b. Value of meat and edible offal exports (US\$ '000)

Exporters	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Africa	\$59 780	\$34 489	\$62 055	\$83 314	\$94 002	\$115 313	\$132 240	\$65 651	\$50 952	\$183 645
Namibia	\$97 630	\$141 179	\$126 532	\$144 495	\$159 105	\$205 665	\$193 003	\$188 107	\$181 542	\$142 371
Botswana	\$51 293	\$74 148	\$81 365	\$112 092	\$91 645	\$114 893	\$159 520	\$48 353	\$65 483	\$121 652
Swaziland	\$5 378	\$1 981	\$2 073	\$568	\$4 021	\$1 477	\$3 821	\$4 441	\$5 802	\$6 318
Zambia	\$344	\$247	\$63	\$849	\$601	\$742	\$719	\$328	\$741	\$2 950
Malawi	\$0	\$3	\$14	\$0	\$1	\$0	\$0	\$4	\$107	\$896
Zimbabwe	\$4 790	\$4 175	\$4 105	\$5 185	\$1 033	\$682	\$494	\$881	\$1 157	\$474
Tanzania	\$74	\$232	\$3 325	\$1 826	\$554	\$244	\$28	\$29	\$539	\$284
Mauritius	\$218	\$266	\$265	\$148	\$213	\$107	\$718	\$910	\$275	\$277
Angola	\$1	\$11	\$1		\$1	\$80	\$1	\$0	\$0	\$94
Mozambique	\$4	\$22	\$18	\$23	\$104	\$1	\$0	\$60	\$0	\$56
Seychelles		\$2	\$169		\$168	\$59	\$2	\$0	\$0	\$55
Madagascar	\$6	\$26	\$50	\$10	\$36	\$11	\$2	\$1	\$0	\$48
DRC				\$8	\$172	\$1 162	\$490	\$0	\$0	\$22
Lesotho					\$55	\$4	\$25	\$0	\$0	\$10
World	\$55 971 670	\$63 930 865	\$67 734 320	\$78 641 750	\$97 997 975	\$89 124 866	\$98 007 004	\$117 125 404	\$117 316 125	\$121 923 954
SADC Aggregation	\$219 518	\$256 781	\$280 035	\$348 518	\$351 711	\$440 440	\$491 063	\$308 765	\$306 598	\$459 152

ANNEX 10. RECOMMENDATIONS FOR NATIONAL AND REGIONAL POLICY ISSUES TO BE ADDRESSED THROUGH THE VET-GOV PROGRAMME

A National Level:

i) Policy issues at National Level;

1. Support the availability of timely and accurate statistical data e.g. tax, duties, market trends and production information.
2. Support input cost, value chain analysis and cost compliance.
3. Production, productivity and meeting quality requirements.
4. Competitiveness of local commodities and Niche markets development.
5. Accurate calculation of cost of production and use information to lobby for policy influence.
6. Support training in market price negotiations.
7. Strengthen extension services.
8. Farmer organisations should have an input in national research agendas for agriculture.
9. Farmer organizations should enter into dialogue to influence the curriculum at higher education and research institutions so that they are relevant to national needs.
10. Farmer organisations must have a structured platform for regular engagement with their government (and not on ad hoc basis).
11. Support training in advocacy and lobbying for policy formulation and analysis skills.
12. Farmer organisations should be involved from policy formulation through to adoption.
13. Farmer organizations should be encouraged to participate in budget plenary and drafting processes so that their livestock needs and requirements are mainstreamed in the final national budgets.
14. Out of the 10% budgetary allocation to agriculture agreed to in Maputo, a specified portion (30%) should be allocated to the livestock sector.

ii) Capacity building issues at National Level:

1. Research institutions e.g. BFAP, ARC, Universities to assist in data collection and market trends; establish network linkages with AU-IBAR.
2. Support Training in policy formulation & analysis, advocacy and lobbying.
3. Strengthening of veterinary laboratory services and facilities; influence the training of veterinarians and paravets specific to the sector.
4. Training of farmers and government officials on the latest techniques and skills specifically related to the sector e.g. Artificial insemination (AI) and embryo transfer (ET) technologies.

B Regional Level:

i) Policy issues at Regional Level;

1. Regional/national trade/SPS platform committees established and strengthened.
2. Investigate status of trade agreements (import, export levies);
 - Regional trading and SPS
 - Find areas of agreements
 - Identifying markets
 - Infrastructure (Roads, ports, railway network, cold chain, customs, communication, port of entries e.g. one-stop-shop)
 - Access to genetic material
3. Support buying regional to promote increased consumption (branding etc)
4. Review the current SPS agreements between member states
5. Settings and compliances to OIE minimum terrestrial animal health code

- a. Standards
- b. Animal health/welfare
 - i. Labs, diseases and drugs
 - ii. Training (Vets and Farmers)
 - iii. Finance
 - iv. Animal feeds; production
6. Training of leaders on regional issues

ii) Capacity building issues at Regional Level;

1. Training of leaders on regional trade/SPS and production issues.
2. Investigate markets and access its viability (cost benefit analysis).
3. Regional coordination of best practices.
4. Enhance and promote competence of professionals in the sector.
5. Create official plat form
6. Resource mobilization
7. Current livestock information.

