



IMPLEMENTATION PLAN

GAME MEAT STRATEGY FOR SOUTH AFRICA



**forestry, fisheries
& the environment**
Department:
Forestry, Fisheries and the Environment
REPUBLIC OF SOUTH AFRICA



Table of Contents

1. INTRODUCTION	3
SO 1: Create an Enabling Policy, Legal and Regulatory Framework	4
1.1 Align legislation, policies, regulations and strategies of DALRRD, DFFE, DoH, DTIC, MAs and other relevant SOE's in the Wildlife Sector, including Game Meat Value Chain to facilitate coordination and integration	6
1.2 Game Meat Regulations (gazetted) Clarification Workshops	8
1.3 Full implementation of the Wildlife Economy Certification Scheme with endorsed incentives and benefits	9
1.4 Develop Industry Standards for Game Meat to ensure product safety / quality ..	10
1.5 Streamlined, aligned and integrated Permitting and Licensing Systems	12
1.6 Regaining WOAHP FMD Free Zone Status and exploration of trade opportunities irrespective of official status	13
SO 2: Governance	16
2.1 Establishment of the voluntary Game Meat Industry Association	17
2.2 Determine feasible funding models to support voluntary Game Meat Industry Association's operations	19
SO 3: Market Intelligence	21
3.6 Obtain relevant data on the number of game ranches, CAE ranches and hectares used per ranch in SA	28
3.7 Develop a database of value chain actors and service providers	29
SO 4: Demand, Supply and Consumption	31
4.4 Product Development	36
4.5 Product Quality	37
4.6 Increase supply (game meat production)	37
SO 5: Innovation, Research and Development	39
5.3 Peripheral Technological Opportunities	44
5.4 Establishment of Center of Excellence	46
SO 6: Transformation and Inclusive Participation	48
6.1 Education of New Entrants, CPA's, PDI's, Women and Youth	49
6.2 Funding schemes / game donations to enhance industry transformation	50
6.3 Funding schemes to enhance transformation for CPAs and Traditional Authorities	52
6.4 Ensure inclusivity through a free-market mentorship programme	54
SO 7: Skills, Knowledge and Sector Awareness	56
7.2 Consumer awareness campaigns, marketing and education	59
7.3 Education related to Game Meat Processing	61
7.4 Establish capacity building programmes aimed at promoting biodiversity conservation	62
SO 8: Marketing, Branding, Sales and Communications	65
8.1 Branding Business Case	66
8.2 Interventions related to marketing and communication	68

8.3 Marketing Campaign to Create Consumer Awareness	69
8.4 Develop a National Game Meat Sales Plan.....	70
8.5 Game Meat Marketing Events / Exhibitions.....	71
8.6 SPV to Create an Incubation Fund.....	72
SO 9: Enabling Development of Large Commercial Ventures in the Game Meat Sector	74
9.1 Feasibility to construct large enterprises for agro-ecological production systems, harvesting, and natural game meat processing	75
SO 10: Enabling Development of Large Game Production and associated Value Chain in Community Owned Areas	77
10.1 Feasibility to construct 5 community-owned large enterprises for agro-ecological production systems, harvesting, and natural game meat processing.....	78
11. Investment Needs	82
11.1. Investment needs	82

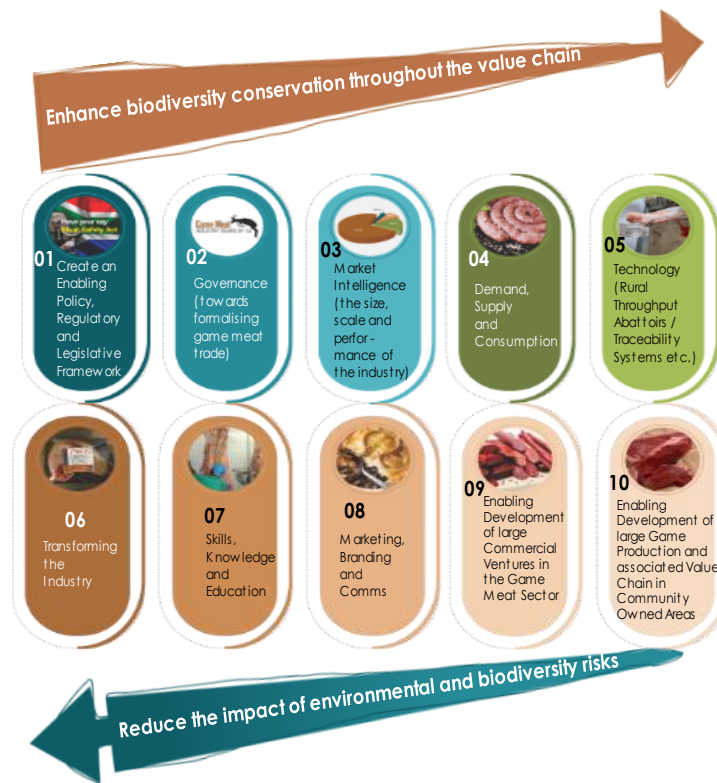
1. INTRODUCTION

The investment of resources into the development of the Game Meat Strategy for South Africa is proof of government’s commitment to augment industry inclusive growth while safeguarding

and conserving the stock of biological resource. The critical actions to move a strategy from a document that sits on a shelf to actions that drive sectoral growth is encompassed the implementation plan.

In volatile market and economic conditions, especially post Covid-19, the allocation of resources such as funds, people and managerial attention to execute a strategy of this nature is not a once-off decision and may require constant and ongoing adjustment. This is because no implementation plan can remain static whilst the environment in which the business functions change continuously.

The strategy identified 10 Strategic Objectives and two cross-cutting Strategic Objectives, as depicted in the figure below:



The implementation plan sets out interventions per Strategic Objective that must be undertaken to achieve the envisaged industry growth. Importantly, implementing these interventions would require sectoral efforts including the spheres of government, private sector, NGOs, academia and communities to invest financial, non-financial and human resources.

Three timelines are identified and used in the strategy and implementation plan, namely:

- Short Term (ST) which implicates the financial year 2023 to March 2025.
- Medium Term (MT) implicates the period from April 2025 to March 2027.
- Long Term (LT) is the period from April 2027 to March 2030.

Table 1: Align legislation, policies, regulations and strategies of DALRRD, DFFE, DoH, DTIC, MAs and other relevant SOE's in the Wildlife Sector, including Game Meat Value Chain to facilitate coordination and integration

1.1 Align legislation, policies, regulations and strategies of DALRRD, DFFE, DoH, DTIC, MAs and other relevant SOE's in the Wildlife Sector, including Game Meat Value Chain to facilitate coordination and integration		Intervention #1	Investment Needed: R0			
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Engage Government Departments, SOE's and other Government Agencies involved in the Game Meat Value Chain and other wildlife value chain activities to facilitate cooperative governance, including maximizing relevant legislation and policies, clarifying and managing overlapping mandates and minimizing conflicts	ST	Sept 2023	March 2024	R 0	DFFE	
2. In line with Intergovernmental Relations Framework Act 13 of 2005, enhance inter-departmental collaboration through entering into Memorandum of Understandings with the aim of harmonizing and creating an enabling policy, legal and regulatory environment. The purpose of coordination specific to this strategy is therefore to, amongst others: <ul style="list-style-type: none"> Identify, streamline, and improve policy, legislative and regulatory frameworks for the purpose of growing the game meat industry, Collaborate in developing and/or improving legislative, regulatory and policy framework required to mitigate the impact of lead contamination, environmental and biodiversity risks associated with game meat production and subsequently promote biodiversity conservation 	ST	April 2024	March 2025	Unknown		

1.1 Align legislation, policies, regulations and strategies of DALRRD, DFFE, DoH, DTIC, MAs and other relevant SOE's in the Wildlife Sector, including Game Meat Value Chain to facilitate coordination and integration

Intervention #1 Investment Needed: R0

- Pool resources, financial and non-financial, to support SMMEs within the game meat industry in an effort to address transformation
- Enhance coordination and collaboration between various players in the game meat industry
- Strengthen capability on local value addition
- Advocate for the game meat industry domestically, regionally and internationally
- Support the functions and operations of the Sustainable Wildlife Economy Council, including the voluntary Game Meat Industry Association

The Government coordination will comprise of the following Departments: Department of Agriculture, Land Reform and Rural Development (DALRRD) and its entities (NAMC and ARC); Department of Health; Provincial conservation authorities; DFFE and its entities (SANBI, SANParks & Isimangaliso); Department of Tourism; and the Department of Trade, Industry and Competition and its entities (NRCS)

Risks or Dependencies:

The lack of buy-in from all Departments involved in the Game Meat Value Chain could be a potential risk. Timeframes often associated with inter-departmental decision-making or bureaucracy could lead to a process that takes months/years, whilst the entire strategy and the implementation plan depends on this crucial intervention. Lack of capacity and resources within government to effectively participate.

Potential Funding Instruments:

Treasury Funded / Departmental Budgets

Impact of Intervention (metrics)	Baseline	Target	Actual
Annual report on progress related to implementation of Game Meat Strategy (1 = Yes / 0 = No)		1	

1.1 Align legislation, policies, regulations and strategies of DALRRD, DFFE, DoH, DTIC, MAs and other relevant SOE's in the Wildlife Sector, including Game Meat Value Chain to facilitate coordination and integration

Intervention #1 Investment Needed: R0

Terms of References and Programme of Action (1 = Yes / 0 = No)	1
Completion of awareness campaign clarifying mandates by latest November 2023 (1 = Yes / 0 = No)	1
Number of Government meetings hosted per annum (from 2023/2024 financial year)	0 4

Table 2: Clarification Workshops of the (gazetted) Game Meat Regulations

1.2 Game Meat Regulations (gazetted) Clarification Workshops

Intervention #2 Investment Needed: R0.02 mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Schedule two clarification workshops related to the (gazetted) Game Meat Regulations where DALRRD representative(s) or veterinarians explain the regulations in practical terms to industry with appropriate question and answer sessions	ST	September 2023	April 2024	Not Applicable	DALRRD DFFE

Risks or Dependencies:

The Game Meat Regulations are not well understood or mis-interpreted by industry

Potential Funding Instruments:

Once-off set of clarification workshops: DFFE / DALRRD
IT Platform of DFFE / DALRRD to be used to host these virtual workshops

Impact of Intervention (metrics)

	Baseline	Target	Actual
Number of clarification workshops held in 2023/2024 financial year to improve compliance in terms of the Game Meat Regulations	0	2	

Table 3: Implementation of the Wildlife Economy Certification Scheme

1.3 Full implementation of the Wildlife Economy Certification Scheme with endorsed incentives and benefits			Intervention #3	Investment Needed: R12 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Implement the wildlife economy incentive scheme to facilitate and incentivize increased regulatory compliance, good management / ranching practices linked to responsible / sustainable practices, safety and quality of game meat, traceability / transparency systems thus the integrity of the game meat brand.	ST/LT	April '24	March '30	R2 million	DFFE	
2. Mobilise resources from Government, NGO's, Private Sector and other funders for effective incentives	ST/ LT	April '24	March '30	R 10 million	DFFE	

Risks or Dependencies:

Dependency: Finalising, adoption and implementation of the Certification Scheme by the industry

Potential Funding Instruments:

Treasury Funded / Departmental Budgets/ Donor Funded

Impact of Intervention (metrics)	Baseline	Target	Actual
Game meat compliance increases by 25% year on year for the first 3 years	10%	85%	1
Incentive scheme finalised and implemented to improve game meat integrity (1 = Yes / 0 = No)		1	

Table 4: Develop Industry Standards

1.4 Develop Industry Standards for Game Meat to ensure product safety / quality			Intervention #4	Investment Needed: R 41 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Development of industry standards: introduction of a meat classification system, similar to red meat qualification for quality, but adding species, the origin of meat, meat handling, traceability, ammunition used etc. to increase product quality, for: <ul style="list-style-type: none"> • Informal market standards • Formal / local retail market standards 	ST/MT	April 2024	March 2027	R 4 million	Game meat industry association in partnership with the relevant authority such as DALRRD, SABS & NRCS	
2. Independent scientifically based empirical research to inform classification system and appropriate metrics	MT	April 2025	March 2027	R2 million	Game meat industry association	
3. Development of capacity to govern these standards in collaboration with DALRRD (various Directorate) and DoH to ensure effective implementation in relation to meat delivered in the formal market	MT	April 2025	March 2027	R 0 million	Game meat industry association to administer and ensure that quality standards are adhered to. Departments to increase their capacity to monitor and audit processes and products	
4. Increase conformance in line with meat safety inspection (postmortem) requirements to ensure that game meat that reaches local communities, ranch workers, the informal market (from a food security perspective) or the formal market adhere to basic meat safety standards through:	MT	April 2025	March 2027	R30 million	DALRRD (regulates) Potential funders	

1.4 Develop Industry Standards for Game Meat to ensure product safety / quality		Intervention #4	Investment Needed: R 41 mil			
<ul style="list-style-type: none"> Increased number of active / approved game meat abattoirs Increased number of Meat Examiners Appropriate measures implemented to prevent or remove lead contamination 						
5.	Assess the feasibility of establishing culling and carcass management standard operation procedures required to reduce lead availability to wildlife and people	MT/LT	April 2025	June 2027	R2 million	Food Safety Agency (Pty) Ltd (The designated assignee for the enforcement of the regulations)
6.	Increase conformance in line with quality/compositional regulations under the Agricultural Product Standards Act, 1990 (Act No.119 of 1990): <ul style="list-style-type: none"> The quality of processed game meat (cooked meat, biltong, salami, etc.) are covered by the "Regulations regarding the classification, packing and marking of processed meat products intended for sale in the Republic of South Africa" (No.R. 1283 of 4 October 2019). The quality of raw game mince, patties, wors/sausages are covered by the "Regulations regarding the classification, packing and marking of certain raw processed meat products intended for sale in the Republic of South Africa" (No.R. 2410 of 26 August 2022) 	MT/LT	April 2025	June 2027	R3 million	

Risks or Dependencies:

Dependencies: Acceptance of classification system by industry.

Potential Funding Instruments:

1.4 Develop Industry Standards for Game Meat to ensure product safety / quality	Intervention #4	Investment Needed: R 41 mil
--	------------------------	------------------------------------

International donors and industry

Government

Impact of Intervention (metrics)	Baseline	Target	Actual
Successful implementation of Game Meat Classification System (1 = Yes / 0 = No)		1	
Development of governance structure to maintain and audit this system (1 = Yes / 0 = No)		1	
Increased compliance / quality of game meat (1 = Yes / 0 = No)		1	
Link to the DFFE's Wildlife Economy Certification Scheme (1 = Yes / 0 = No)		1	

Table 5: Streamlined, aligned and integrated permitting and licensing systems

1.5 Streamlined, aligned and integrated Permitting and Licensing Systems		Intervention #5	Investment Needed: R 24 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Assess the need and review the requirements to streamline, align and integrate provincial and national permitting and licencing systems to maximise efficiency for stakeholders and regulators.	ST	April 2024	December 2024	R0.5 million	DFFE Provincial Conservation Agencies
2. Determine the feasibility and associated costs of a national integrated (across all departments) and real time online permitting system	MT	April 2025	June 2026	R3.5 million	Government Desk
3. Based on the outcome of 2, develop an integrated online permit and licence system to ensure increased efficiency. (This project should be integrated into and built upon DFFE electronic permitting system project).	ST/LT	April '24	March '30	R20 million development costs plus monthly maintenance costs of approximately R0.5 Million	DFFE Management Authorities

1.5 Streamlined, aligned and integrated Permitting and Licensing Systems	Intervention #5	Investment Needed: R 24 mil
4. Build business rules into permit system and processes to disincentivize lack of compliance (e.g. sanction for not submitting returns etc.) and possibly incentivising correct behaviour (e.g. possible fee reduction for submitting returns etc.)	Ongoing	Unknown DFFE

Risks or Dependencies:

Close liaison with SITA. Budget availability for development and ongoing maintenance.

Potential Funding Instruments:

- Government Fiscus
- Industrial Development Corporation
- African Development Bank
- Development Bank of South Africa
- Other Grant and Donor Funding Options

Impact of Intervention (metrics)	Baseline	Target	Actual
Decreased time to issue permits / licences through streamlined and integrated online system		80%	
Increased compliance by creating a user friendly, practical, simplified and integrated system	10%	85%	
Build market intelligence framework through data collected in permitting / licencing system and obtain reports to inform decision making 'by the press of a button' (1 = Yes / 0 = No)		1	

Table 6: Regaining WOH FMD Free Zone Status and exploration of trade opportunities irrespective of official status

1.6 Regaining WOH FMD Free Zone Status and exploration of trade opportunities irrespective of official status	Intervention #6	Investment Needed: R33 mil			
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency

1.6 Regaining WOAH FMD Free Zone Status and exploration of trade opportunities irrespective of official status			Intervention #6	Investment Needed: R33 mil	
1. Collaboration between Red Meat and Game Industry to support Veterinary Services strategy and measures to eventually regain SA's FMD free zone Status the WOAH to increase game meat trade opportunities in the country and our competitiveness globally (e.g. Red Zone = Infected Zone; Yellow Buffer Zone = Protection Zone; Blue Zone = Free Zone)	ST	Sept 2023	March '30	ST: R1 mil	DALRRD
	MT			MT to LT: R30 million	DFFE
	LT				
2. Explore opportunities for trade of game meat internally and for export from all areas of South Africa irrespective of the official WOAH FMD status including Scientific research on specific game meat / products that emanate from FMD zones and including Conduct research on commodity-based Trade specifically in areas affected by FMD	ST/LT	Ongoing			
3. Improved permitting and traceability system for controlled movement of game animals (inclusion into Livestock Identification and Traceability System) and educate rural ranchers about the impact of FMD and their role to curb the spread of the disease	ST/LT	Sept 2023	March 2030	R2 million	

Risks or Dependencies:

Risk: Conflict between Red Meat and Game Industries Resistance from Red Meat Industry to collaborate in the research and implementation of measures. Non-compliance of ranchers with regards to the control measures and flaunting of regulations of which some examples are moving animals without permits, transporting carcasses, illegal hunting, illegal keeping of buffalo etc. Dependencies: Integrated online permit and licence system implemented, effective traceability system of livestock and game implemented

Potential Funding Instruments:

- African Development Bank
- Development Bank of South Africa
- Other Grant and Donor Funding Options

Impact of Intervention (metrics)	Baseline	Target	Actual
----------------------------------	----------	--------	--------

1.6 Regaining WOAAH FMD Free Zone Status and exploration of trade opportunities irrespective of official status

Intervention #6

Investment Needed: R33 mil

Percentage of increase in internal and export trade of game meat from areas free from and areas infected by FMD

10%

60%



SO 2: Governance

Table 7: Establish the voluntary Game Meat Industry Association

2.1 Establishment of the voluntary Game Meat Industry Association			Intervention #8	Investment Needed: R1.5 mil	
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
<p>1. Undertake a feasibility study of establishing a single industry representative association guided by clear ToRs (i.e. the voluntary Game Meat Industry Association) to represent the Game Meat Industry (similar to the Red Meat Association). The purpose of this association will be to:</p> <ul style="list-style-type: none"> • Communicate industry issues to the Government • Mandated to be the industry representative managing any game meat related matters and conservation related risks (thus to act on behalf of the game meat industry in close consultation with government and value chain actors) • Promotion of SA game meat locally, regionally and internationally • Quality assurance to coordinate and administer industry quality assurance programmes from ranch, to processors, to market (to be audited by Departments annually) • Data gathering and management of various aspects of game meat industry • Conduct and manage research and development on behalf of the industry to: <ul style="list-style-type: none"> • Inform about international trade negotiations for game meat products 	ST MT	Sept 2023	March 2027	ST: R 1 million	Industry players supported by DFFE

2.1 Establishment of the voluntary Game Meat Industry Association

Intervention
#8

Investment Needed: R1.5 mil

<ul style="list-style-type: none"> • Improve ranching systems and on-ranch practices • Quality and food safety standards research programmes 						
2. Appoint a panel of industry experts and government role players to oversee the establishment of voluntary Game Meat Industry Association, its mandate, roles and responsibilities	ST/MT	Sept 2023	March 2027		R0.5 million	DFFE DALRRD DOH Value Chain Actors
3. Government to support value chain actors in the establishment of a single game meat industry representative association with clear ToRs						

Risks or Dependencies:

Risks: Industry value chain actors does not buy into the concept of voluntary Game Meat Industry Association. Funding model for voluntary Game Meat Industry Association may increase cost of doing business for ranchers and value chain actors (as a levy per carcass is proposed or an addition to hunting licence costs).

Dependencies: Government approval of the establishment of an industry body to govern the Game Meat Industry and related value chain

Potential Funding Instruments:

The DTIC or IDC (funds for feasibility study)

Through the establishment of statutory measure for game meat as a commodity under the marketing agricultural product act

African Development Bank

Development Bank of South Africa

Other Grant and Donor Funding Options

Self-funded based on levy related income per hot carcass or utilising permit and / or licencing costs

Impact of Intervention (metrics)	Baseline	Target	Actual
Buy-in from value chain actors (1 = Yes / 0 = No)		1	
Voluntary Game Meat Industry Association Committee appointed (1 = Yes / 0 = No)		1	
Mandates, roles and responsibilities established (1 = Yes / 0 = No)		1	
Administrative and operational team appointed (1 = Yes / 0 = No)		1	

Table 8: Funding model (s) to support the Operations of the voluntary Game Meat Industry Association

2.2 Determine feasible funding models to support voluntary Game Meat Industry Association's operations

Intervention #9

Investment Needed: R30,5 mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Develop appropriate funding models for voluntary Game Meat Industry Association: <ul style="list-style-type: none"> • Payable per hot carcass hunted or harvested • Industry association fees • Shareholding model to be refined • Permit and licence fees • Include initiatives and opportunities on the Biodiversity Sector Investment Portal 	ST/MT	Sept 2023	March 2027	R500,000	NAMC supported by the voluntary Game Meat Industry Association and DFFE
2. Establish a seed funding for the initial blended-finance programme in partnership with like-minded government institutions and private sector to support new SMMEs into the game meat industry	ST/ MT	April 2024	March 2027	R30 million	DFFE

Risks or Dependencies:

Dependencies: Industry value chain actors does not buy into the concept of voluntary Game Meat Industry Association. Funding model for voluntary Game Meat Industry Association may increase cost of doing business for ranchers and value chain actors (as a levy per carcass is proposed or an addition to hunting licence costs). Dependencies: Government approval of the establishment of an industry body to govern the Game Meat Industry and related value chain

Potential Funding Instruments:

Treasury / Government Funded
The DTIC

Impact of Intervention (metrics)	Baseline	Target	Actual
----------------------------------	----------	--------	--------

2.2 Determine feasible funding models to support voluntary Game Meat Industry Association's operations

**Intervention
#9**

**Investment Needed: R30,5
mil**

Voluntary Game Meat Industry Association established (1 = Yes / 0 = No)	1
Funding model implemented (1 = Yes / 0 = No)	1
Voluntary Game Meat Industry Association Constitution and Code of Conduct developed (1 = Yes / 0 = No)	1
Benefits and value of voluntary game meat industry association determined, communicated and approved by government and industry (1 = Yes / 0 = No)	1



SO 3: Market Intelligence

Table 9: Game Meat Data

3.1 Collation of Data for the Game Meat Industry				Intervention #11	Investment Needed: R10 mil
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Establish partnerships and data sharing agreements with academia, research institutions, StatsSA, industry, government departments etc for the purpose of conducting research and data collection relevant to the game meat industry	ST/MT	April 2024	March '27	R5 million	DFFE Voluntary Game Meat Industry Association
2. Collect and record data as required, set up and maintain databases (continuous process thereafter)				R 5 million	
3. Development of biennial reports to understand industry trends, performance, and market dynamics					
4. Leverage on existing platforms such Research Indaba, Biodiversity Economy Indaba, conferences etc to encourage research in the industry					

Risks or Dependencies:

Lack of data shared by value chain actors/ data owners

Potential Funding Instruments:

International Fund for Agricultural Development
 African Union Development Agency
 National Agricultural Marketing Council (NAMC)
 ABSA Agribusiness

3.1 Collation of Data for the Game Meat Industry	Intervention #11	Investment Needed: R10 mil
---	-------------------------	-----------------------------------

Grant, donor or other funding that is raised by initiatives such as game auctions			
Impact of Intervention (metrics)	Baseline	Target	Actual
Appropriate data ownership and management models established (1 =Yes/ 0 =No)		1	
Knowledge management system developed (1 = Yes / 0 = No)		1	
Data availability for government and scientific research in Game Meat Value Chain (1 = Yes / 0 = No)		1	

Table 10: Size and Scale of the Game Meat Industry

3.2 Short term determination of the Size and Scale of the Game Meat Industry (in collaboration with Industry Associations)	Intervention #12	Investment Needed: R18 mil
---	-------------------------	-----------------------------------

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Undertake a market intelligence study focusing on the current market trends (internationally, regionally and domestically), competitor analysis, consumer demand studies, South Africa's comparative advantage analysis, pricing trends, how the country can increase its market share in the game meat market:	ST	April 2024	March 30	ST: R2 million	DFFE supported by NAMC Potential PPP or suggested voluntary Game Meat Industry Association as custodian of data
<ul style="list-style-type: none"> Collate information related to game count(s) per specie(s) in Protected Areas and on Private Wildlife Ranches (with focus on Plains Game) Determine reproduction levels per species Develop standards / guidelines as to the number of estimated animal offtakes per annum per species taking cognisance of what is ecologically sustainable and based on the carrying capacity of the veld Determine the average carcass weight per species and supply of retail products 	MT			MT to LT:	
	LT			R16 million (R2 million per annum)	

3.2 Short term determination of the Size and Scale of the Game Meat Industry (in collaboration with Industry Associations) Intervention #12 Investment Needed: R18 mil

Risks or Dependencies:

Integrity and confidentiality of data is prudent to success of project

Potential Funding Instruments:

PPP with Industry Associations

Crowd Funding Mechanisms to be explored

Impact of Intervention (metrics) Baseline Target Actual

Knowledge / intelligence of industry data (e.g. the number of animals and species harvested or hunted) established and updated annually (1 = Yes / 0 = No) 1

Table 11: Performance of the Game Meat Industry

3.3 Determine the performance / economic value of the Game Meat Industry as part of the Biodiversity Economy Satellite Account Intervention #13 Investment Needed: R26 mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Determine the Economic Value of Game Meat throughout the Value Chain: Value (Rand) and Volume contribution to the Economy of SA:	ST	April 2024	March '30	ST: R2 million	DFFE
<ul style="list-style-type: none"> Production Systems Hunting / Harvesting Abattoir Processing / Value Addition Wholesale Retail Export Other contributions such as translocation services, outfitter related services, veterinary services, 	MT			MT to LT: R24 million (R3 million per annum)	DALRRD-NAMC
	LT				PPP or suggested Game Meat Industry Association as custodian of data

3.3 Determine the performance / economic value of the Game Meat Industry as part of the Biodiversity Economy Satellite Account **Intervention #13** **Investment Needed: R26 mil**

packaging, transport, branding, marketing and selling etc.

- Differentiation between the formal and informal market and its consequent value and volume contribution
- Determine the contribution to food security
- Determine the number of jobs to be created
- Determine the total impact of the industry on the fiscus

Risks or Dependencies:

Lack of reliable data could skew the outcome and implementation of the strategy

Potential Funding Instruments:

PPP with Industry Associations

Crowd Funding Mechanisms to be explored

Impact of Intervention (metrics) **Baseline** **Target** **Actual**

Value of the industry to GDP confirmed and reported (1 = Yes / 0 = No) 1

Value of the industry related to existing jobs created confirmed and reported (1 = Yes / 0 = No) 1

Value of the industry related to food security confirmed and reported (1 = Yes / 0 = No) 1

Table 12: Trade Data and Statistics

3.4 Obtain Industry Wide Trade Data and Statistics **Intervention #14** **Investment Needed: R0.2 mil**

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. To inform decision making, trends etc. as part of the Biodiversity Economy Satellite Account. Integrate with	ST/MT	Sept 2023	March 2027	R200,000	DFFE

3.4 Obtain Industry Wide Trade Data and Statistics	Intervention #14	Investment Needed: R0.2 mil
---	-------------------------	------------------------------------

- current initiatives embarked on by Government to obtain relevant trade data and statistics:
- Improve or update official systems for obtaining trade data
 - SARS HS6 codes to be refined to species and price per product range as well as information related to origin and destination
 - International Data: HS6 code '020890 to be refined and not classified as 'other' meat but as game meat, the particular species as well as origin and destination
 - HS8 Code: SARS data to distinguish between species, per product range as well as origin and destination
2. Consultation with SARS on inter-governmental level

Risks or Dependencies:

Dependencies: Adopting the “game meat” and “specie specific” naming convention instead of the “venison” naming convention

Potential Funding Instruments:

Government / Treasury funded

Impact of Intervention (metrics)	Baseline	Target	Actual
---	-----------------	---------------	---------------

Improved trade data systems (1 = Yes / 0 = No)		1	
HS codes changed or further developed to unique specie and product codes (1 = Yes / 0 = No)		1	

Table 13: Data about approved game meat abattoirs and Game Meat Butcheries

3.5 Obtain data related to the number of approved game meat abattoirs and Game Meat Butcheries in SA	Intervention #15	Investment Needed: R5.2 mil
---	-------------------------	------------------------------------

Description of Activities	Priority	Start Date	Investment Needs
----------------------------------	-----------------	-------------------	-------------------------

3.5 Obtain data related to the number of approved game meat abattoirs and Game Meat Butcheries in SA			Intervention #15	Investment Needed: R5.2 mil	
			Completion Date	Responsible Dept or Implementing Agency	
1. Obtain data related to the number of approved game meat abattoirs and Game Meat Butcheries in SA, their respective capacity utilisation and how to optimise throughput:	ST	April 2024	March 2027	R200,000	DALRRD
	MT/LT	April 2027	March 2028	R5,000,000	DFFE Game Meat Industry Association
<ul style="list-style-type: none"> Assessment of current trends or lack of capacity utilisation of the approved game meat abattoirs Develop a database in one single depository (Cloud Based Platform) of all compliant abattoirs as well as butcheries that process game meat in SA Assist game meat approved abattoirs owners to be compliant with meat safety protocols Obtain costs to process game meat per carcass or per kilogramme Develop a costing model (or application / Mobile App) to assist new entrants on standard costs for processing, product development and prices to determine minimum throughput to ensure financial viability 					

Risks or Dependencies:

Risks: value chain actors may keep information secret if confidentiality cannot be guaranteed

Potential Funding Instruments:

SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment

Comprehensive Agricultural Support Programme

Industrial Development Corporation or the DTIC

Impact of Intervention (metrics) (1 = Yes / 0 = No)	Baseline	Target	Actual
Assessment report on non-feasible approved game meat abattoirs aligned to current information obtained from DALRRD		1	

3.5 Obtain data related to the number of approved game meat abattoirs and Game Meat Butcheries in SA	Intervention #15	Investment Needed: R5.2 mil
Database with location of known abattoirs and examiners on digital platforms		1
SOP's developed and standardised		1
Updated incentive scheme(s) to improve compliance		1
Reliable data on processing per specie collated and made available on digital platforms		1
Standard / basic model / mobile application to determine operational costs of approved game meat abattoirs processing plant and specific product ranges		1

Table 14: Ranch related data and statistics

3.6 Obtain relevant data on the number of game ranches, CAE ranches and hectares used per ranch in SA			Intervention #16	Investment Needed: R 30 mil	
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Consolidate existing data on the current land utilised for game meat ranching or farming as input to the conservation and transformation targets: <ul style="list-style-type: none"> Determine the number and size of game ranches in SA and include on database Determine the number and size of CAE ranches in SA and include on database Collect and maintain demographic data on game ranch ownership 	ST	April 2024	Mar 2027	R 20 million	DFFE SANBI Provincial Conservation Agencies Game Meat Industry Association
2. Continuously update the information as new ranches and CAE's are registered (obtain permits)	MT LT	April 2027	Dec '30	R10 million	Updated by relevant Department but data shared with Game Meat Industry Association entity

Risks or Dependencies:
Integrate project with current initiatives undertaken by SANBI

3.6 Obtain relevant data on the number of game ranches, CAE ranches and hectares used per ranch in SA	Intervention #16	Investment Needed: R 30 mil		
Potential Funding Instruments:				
International Fund for Agricultural Development				
African Union Development Agency				
Impact of Intervention (metrics)		Baseline	Target	Actual
Aligned to District Delivery Model (1 = Yes / 0 = No)			1	
Information provided in consolidated format to government (1 = Yes / 0 = No)			1	
Information available on transformation and its sustainability (1 = Yes / 0 = No)			1	

Table 15: Database of Value Chain Actors and related Service Providers

3.7 Develop a database of value chain actors and service providers	Intervention #17	Investment Needed: R10.2 mil			
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Develop a database of value chain actors that is available for each rancher, hunter, processor or new entrant to draw on when seeking support or needs prospective service providers such as:	ST	Sept 2023	Mar '2024	R0.2 million	DFFE
	MT	April 2024	March 2027	R10 million	PPP
<ul style="list-style-type: none"> • Marketing Agents • Professional Hunters • Outfitters • Auctioneers • Lead-free ammunition manufacturers and suppliers • Mixed farm system owners including game 					Game Meat Industry Association

3.7 Develop a database of value chain actors and service providers

Intervention #17

Investment Needed: R10.2 mil

- All other value chain actors not listed in the preceding activities
- 2. Determine growth, transformation and GDP contribution for all these identified entities
- 3. Continuously update the information as actors and service providers are registered (obtain permits)

Game Meat Industry Association

Updated by relevant department

Risks or Dependencies:

Dependency: Need collaboration from value chain actors

Potential Funding Instruments:

PPP with Industry Associations

Crowd Funding Mechanisms to be explored

Impact of Intervention (metrics) (1 = Yes / 0 = No)

Database of all industry / value chain actors available for use created, continuously updated and available online

Baseline

Target

Actual

1

Annual report on growth, transformation and GDP statistics

1



SO 4: Demand, Supply and Consumption

Table 16: High Level Market Analysis

4.1 Initial Market Analysis to determine Demand, Supply and Consumption			Intervention #18	Investment Needed: R5 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Undertake an initial market analysis to determine demand, supply and consumption of game meat in SA, regionally and internationally to ensure no demand / supply mismatch: <ul style="list-style-type: none"> Determine demand requirements (excluding own use) in the wholesale and retail markets Determine what is the demand for game meat for primary and secondary product ranges Determine current supply needs to service retail contract(s) throughout the year Determine shortfall (in volume) to ensure continuous supply to the retail market 	ST MT	April '2024	March '2027	R5 million	DFFE DALRRD-NAMC	
Risks and / or Dependencies:						
Current stakeholders do not share their research or information gathered for inclusion into this market analysis						
Potential Funding Instruments:						
The DTIC or the IDC Comprehensive Agricultural Support Programme from DALRRD						
Impact of Intervention (metrics)				Baseline	Target	Actual
Review of research already undertaken (1 = Yes / 0 = No)					1	
High level (first round) study completed and findings presented (1 = Yes / 0 = No)					1	

Table 17: Detailed Market Analysis

4.2 Detailed Market Analysis to determine Consumption and Consumer Behaviour			Intervention #19	Investment Needed: R 3 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
<p>1. Undertake a detailed market analysis to determine consumption and consumer behaviour related to game meat in SA considering the following:</p> <ul style="list-style-type: none"> Establish clear definitions of different market types (e.g. informal / formal etc.) Undertake detailed research to determine consumption per capita of game meat in SA: <ul style="list-style-type: none"> From a food security perspective In the informal market In the wholesale market In the retail market Export market Research and understand consumer perceptions about game meat Determine which products are fast movers and favoured by consumers based on different market segments Understand green interventions and the impact of social media on consumer demand for game meat 	ST/MT	April 2024	March '2027	R 3 million	DFFE DALRRD & Entities PPP	

Risks or Dependencies:

Current stakeholders do not share their research or information gathered for inclusion into this market analysis

4.2 Detailed Market Analysis to determine Consumption and Consumer Behaviour	Intervention #19	Investment Needed: R 3 mil
---	-------------------------	-----------------------------------

Potential Funding Instruments:

The DTIC or the IDC
 Comprehensive Agricultural Support Programme from DALRRD
 Other grant or donor funding emanating from sources such as the AFD, GIZ, WWF etc.

Impact of Intervention (metrics) (1 = Yes / 0 = No)	Baseline	Target	Actual
Formalised definitions of all market types and intention of using these types		1	
Coherent view of consumer requirements such as: what are consumers willing to pay for and will they pay a premium for quality game meat products		1	
Measure effect of social media on consumer behaviour		1	

Table 18: Empirical Research

4.3 Empirical research on game meat health benefits	Intervention #20	Investment Needed: R 5 mil
--	-------------------------	-----------------------------------

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Consolidation of results of studies already undertaken	ST	Sept 2023	Mar 2024		DFFE
2. Undertake additional scientific research to determine the nutritional value of game meat:	ST/LT	April 2024	March '30	R 5 million	Lead Task team DALRRD DoH Game Meat Industry Association
<ul style="list-style-type: none"> • Fatty acid profiles • Intramuscular fat percentage • Sensory profiles etc. 					
3. Undertake scientific research to (1) test health benefits of game meat (2) measure prevalence and risks associated with lead exposure across the production and consumption chain					

4.3 Empirical research on game meat health benefits**Intervention #20** **Investment Needed: R 5 mil****Risks or Dependencies:**

Dependence: Researchers sharing results, data and any other information from previous research projects

Potential Funding Instruments:

The DTIC or the IDC

Comprehensive Agricultural Support Programme from DALRRD

Other grant or donor funding emanating from sources such as the AFD, GIZ etc.

Impact of Intervention (metrics) (1 = Yes / 0 = No)Results of earlier and more recent studies: consolidated into an integrated report
research conducted on the health benefits of game meat

	Baseline	Target	Actual
--	-----------------	---------------	---------------

1

1

Table 19: Product Development

4.4 Product Development			Intervention #21	Investment Needed: R 5 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Conduct product research into the economic and practical feasibility of game meat products for continuous / sustainable supply: <ul style="list-style-type: none"> • High-end cuts and related products • Dried products (biltong, droëwors) • Processed products • Halaal products • Canned products • Prepared meals • Low end products • Bone products • By-products (e.g. petfood / skins / traditional healers etc.) 2. Develop and publish game meat recipe book	MT / LT	April '25	March '30	R5 million	Game Meat Industry Association, DFFE	
Risks or Dependencies:						
Need buy-in from retailers regarding sales volumes per product range						
Potential Funding Instruments:						
The DTIC or the IDC						
PPP with retailers and / or current game meat product producers						
Other grant or donor funding emanating from sources such as the AFD, GIZ, WWF etc.						
Impact of Intervention (metrics) (1 = Yes / 0 = No)				Baseline	Target	Actual
Developed product(s) based on market information and market segmentation					1	
Game meat recipe book developed and published					1	

Table 20: Product Quality

4.5 Product Quality			Intervention #22	Investment Needed: R 5 mil	
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Conduct research into quality of game meat products to: <ul style="list-style-type: none"> • Ensure consistent quality of game meat product ranges • Understand what drives or determine the quality of game meat • Ensure game meat is free of lead and other contaminants 	MT / LT	April '2025	March '30	R 5 million	DFFE,DALRRD

Risks or Dependencies:

None

Potential Funding Instruments:

The DTIC or the IDC

SEDA or SEFA

Other grant or donor funding emanating from sources such as the AFD, GIZ, WWF etc.

Impact of Intervention (metrics)

	Baseline	Target	Actual
Determined consumer needs and product preferences (1 = Yes / 0 = No)		1	
Factors / characteristics that determine quality defined and documented (1 = Yes / 0 = No)		1	
Independent assurance of meat safety and quality (1 = Yes / 0 = No)	1		

Table 21: Increase Supply

4.6 Increase supply (game meat production)			Intervention #23	Investment Needed: R 1 mil	
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency

4.6 Increase supply (game meat production) **Intervention #23** **Investment Needed: R 1 mil**

1. Increase volume and period of supply of game into the formal market	MT / LT	April 2025	March '30	R 1 million	DFFE, Entities and MAs
<ul style="list-style-type: none"> • Develop a game meat supply growth plan. Note that this intervention should take cognisance of and mitigate any conservation related risks • Establish feasibility of cooperatives / associations to structure and improve sustainable supply 					PPP

Risks or Dependencies:

Cognisance of seasonality, if there is not consistent supply in season, specifically in the formalised retail sector, it may inhibit sectoral growth

Potential Funding Instruments:

The DTIC or the IDC
 Other grant or donor funding emanating from sources such as the AFD, GIZ, WWF etc.

Impact of Intervention (metrics)	Baseline	Target	Actual
---	-----------------	---------------	---------------

Increase volume and period of supply game meat in the formal retail market	6,000t	40,000t	
Structures created to assure sustainable supply (1 = Yes / 0 = No)		1	
Supply Strategy developed that caters for consistent or more reliable supply throughout the year, while preventing or mitigating conservation related risks (1 = Yes / 0 = No)		1	



SO 5: Innovation, Research and Development

Table 22: Feasibility Study approved game meat abattoirs

5.1 Feasibility to construct and institute approved game abattoirs in SA		Intervention #24	Investment Needed: R30 mil			
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Embark on a detailed risk analysis of game approved abattoirs specifically related to its feasibility with varying supply, peak supply over weekends and in hunting season, capacity utilisation etc.	ST/MT	April 2024	Mar '2027	R10,000,000	DALRRD & Entities DFFE DoH	
2. Assessment of existing abattoirs to determine: <ul style="list-style-type: none"> Capacity utilisation of existing abattoirs as there are 575 abattoirs in SA of which 65 abattoirs are registered for game meat, 6 for ostrich and 5 for crocodiles. There are 20 RTA's and 22 Infrequent Slaughtering Low Throughput abattoirs for game registered Determine the location of the 509 other meat abattoirs, their capacity and if they can also accommodate game carcasses with other red meat Determine which facilities are still operational versus those that closed down as closed abattoirs could be converted to game meat abattoirs 	ST/MT	April 2024	Mar '2027		Innovation Hub, CSIR, TIA	
3. Conduct a feasibility study for FMD (red-line areas) to convert conventional abattoirs to FMD certified abattoirs	ST/MT	April 2024	Mar '2027			
4. Conduct a feasibility study to improve the compliance of meat safety through implementation of abattoirs and processing facilities by:	ST/MT	April 2024	Mar '2027			

5.1 Feasibility to construct and institute approved game abattoirs in SA		Intervention #24	Investment Needed: R30 mil
--	--	------------------	----------------------------

- Establish plan / method to ensure viable and sustainable game meat abattoirs to determine options pertaining to the following infrastructural needs:
- Measurement and verification to ensure that the site's profile complements the technology selected etc. (e.g. seasonal profile and its impact on financial viability)
- Access: roads and distance to market
- Services and related utilities such as water, power and waste water
- Determine the most suitable technology options based on resource assessments, availability, reliability to address the needs and objectives of the ranch or if any alternatives exist
- Define specific requirements from building, through process control, flow, to meat inspection
- Estimated costs: capex and opex
- Define preliminary contracting strategy
- List of applicable permitting, licencing and other statutory requirements
- Identify and analyse risks
- Define funding options and strategies
- Based on all the information obtained, develop the preliminary investment case complemented by a financial model

ST/MT April 2024 Mar '2027

5. Collaboration through co-operative associations to improve financial viability of abattoirs (secure sufficient throughput e.g. that various ranchers use

ST April 2024 March '30
MT

R10,000,000

5.1 Feasibility to construct and institute approved game abattoirs in SA	Intervention #24	Investment Needed: R30 mil
---	-------------------------	-----------------------------------

one game meat processing abattoir within a radius of e.g. 50 km based on the hub and spoke model LT

6. Procure funding for development of value addition / processing facilities to create capacity for increased value addition to game meat to convert carcasses into products as well as other infrastructure necessary such as cold trucks, alternative energy (power) solutions, water needs, working capital etc.	ST	Oct '23	March '30	R10,000,000
	MT			
	LT			

Risks or Dependencies:

Capacity utilisation of game meat abattoirs (whether High-, Low- or Rural Throughput as well as Infrequent Slaughtering Low Throughput Abattoirs) is not known

Potential Funding Instruments:

- Feasibility Studies / Business Plans: DTIC
- SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment
- AgriBEE Fund: Acquire shareholding into existing commercially viable enterprises with specific focus on processing and value addition
- Comprehensive Agricultural Support Programme

Impact of Intervention (metrics) (1 = Yes / 0 = No)	Baseline	Target	Actual
Develop a practical, economically feasible and successful model for utilising game meat abattoirs		1	
Completed feasibility studies that detail capacity utilisation of abattoirs in SA and the potential to add game meat to other red meat abattoirs		1	

Table 23: Traceability / Transparency Systems to Improve Meat Quality

5.2 Traceability / Transparency Systems to improve meat quality		Intervention #25		Investment Needed: R8 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
<p>1. Developing a traceability and visibility system linked with information throughout the value chain to ensure improved quality of game meat similar to the livestock industry. This standard should include activities such as:</p> <ul style="list-style-type: none"> • Operational and supply chain efficiency • Create consumer trust through transparency • Reduce food loss and waste • Support sustainability initiatives such as carbon footprint, incentivizing lead-free ammunition use , and appropriate veld management • Identification through appropriate chain of custody management of carcasses to prevent laundering of illegally hunted/harvested animals into the supply chain. • Mitigating food fraud • Impact of traceability on market differentiation 	ST/MT	April 2024	March 2027	R2 million	<p>DALRRD & DFFE</p> <p>DoH</p> <p>Game Meat Industry Association since it will be administered and verified by Game Meat Industry Association over the long term</p>	
<p>2. Detail project scope and relevant TOR to source potential service providers to develop standards that conforms to the Game Meat Regulations; Conservation legislation and Regulations on Foodstuff, Cosmetics and Disinfectants Act, 54 of 1972</p>	MT	April '2025	March 2027	R6 million		
<p>3. Appoint service provider to develop a uniformed traceability and visibility system for game meat</p>						

5.2 Traceability / Transparency Systems to improve meat quality **Intervention #25** **Investment Needed: R8 mil**

products for South Africa linked to enabling technology such as a QR matrix barcodes

4. Implement traceability /transparency system

Risks or Dependencies:

Ensure transparency on origin of game meat from a legal and food safety perspective as there are currently vast amounts of game meat that enters the retail market without information that indicates where the game meat originates from and / or where it was processed

Potential Funding Instruments:

DTIC
SEDA / SEFA

Impact of Intervention (metrics)	Baseline	Target	Actual
---	-----------------	---------------	---------------

Traceability system implemented (1 = Yes / 0 = No)		1	
--	--	---	--

Table 24: Peripheral Technological Opportunities

5.3 Peripheral Technological Opportunities			Intervention #26	Investment Needed: R6 mil	
---	--	--	-------------------------	----------------------------------	--

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
<ol style="list-style-type: none"> 1. Identify new / peripheral technology used to ensure increased compliance to game meat: from post hunt, to slaughter, and then to reach market, specifically related to the functionality of: <ul style="list-style-type: none"> • Mobile abattoirs • Processing plant and related equipment needs 	ST/MT	April 2024	March 2027	R1 million	Game Meat Industry Association

5.3 Peripheral Technological Opportunities

Intervention
#26

Investment Needed: R6
mil

- Cold chain transportation
 - Cold chain rental services / outsourcing
2. Develop a database of technology available in the market with accompanying information that relates to:
- Who provide requisite services / technology or moveable assets
 - The associated costs: capex and opex
 - Terms and conditions of use / ease of use
 - Benefits and risks to ranchers, abattoir owners and the market

MT / LT

April '25

March '30

R5 million

Risks or Dependencies:

Operational costs vary from ranch and game meat processors (respectively) due to business models deployed

Potential Funding Instruments:

SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment

Comprehensive Agricultural Support Programme

Industrial Development Corporation

Government Funded

Impact of Intervention (metrics)

Baseline

Target

Actual

New opportunities identified and promoted that harness new technology for the Growth, Development and Transformation of the Game Meat Industry (1 = Yes / 0 = No)

1

5.3 Peripheral Technological Opportunities

Intervention
#26

Investment Needed: R6
mil

Table 25: Establishment of Center of Excellence for game meat

5.4 Establishment of Center of Excellence

Intervention
#26

Investment Needed: R25, 5mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Formal mandating of the existing Center of Excellence (CoE) on Game founded by ARC and EKIM Wildlife as an official national research and development institution to coordinate R&D in support of the game meat strategy	ST	April 2024	Sept 2024	R0	DFFE, DALRRD
2. Development of a short to medium term R&D priorities for game to support commercialisation and sustainable utilisation of game animal genetic resources	ST	April 2024	Dec 2024	R100 000	CoE, Game Meat Industry Association
3. Development of the national capacity for game R&D	ST/LT	April 2024	March 2030		
<ul style="list-style-type: none"> Development of the investment plan for infrastructure and equipment 	ST	April 2024	March 2025	R150 000	CoE, Game Meat Industry Association

5.4 Establishment of Center of Excellence			Intervention #26	Investment Needed: R25, 5mil		
	<ul style="list-style-type: none"> Implementation of the infrastructure and investment plan 	MT/LT	April 2025	March 2030	R15 million	CoE, Game Meat Industry Association
4.	Conduct R&D on game to support commercialisation and sustainable utilisation of game animal genetic resources focusing on: <ul style="list-style-type: none"> Grading and classification system for game meat Game animal genetic and rangeland/plant biodiversity Game meat processing Game products safety Game animal nutrition, genetics and reproductive biotechnology Production systems (including custom feeding) Meat quality protocols and standards 	ST/LT	April 2024	March 2030	R10 million	CoE, DFFE, DALRRD, Game Meat Industry Association

Risks or Dependencies:

R&D priorities may change rapidly due to ever-changing societal concern and emerging agricultural threats

Potential Funding Instruments:

SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment

Comprehensive Agricultural Support Programme

Industrial Development Corporation

Technology Innovation Agency

Impact of Intervention (metrics)

R&D priorities for the game industry identified and technological solutions developed to promote commercialisation and transformation of the game industry (1 = Yes / 0 = No)

Baseline	Target	Actual
	1	



SO 6: Transformation and Inclusive Participation

Table 26: Education of New Entrants, CPA's, PDI's, Women and Youth

6.1 Education of New Entrants, CPA's, PDI's, Women and Youth		Intervention #27		Investment Needed: R20 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Develop an educational campaign aimed at new entrants in the game meat industry: PDI's, women, youth, CPA's and emerging farmers on: <ul style="list-style-type: none"> Sustainable Land Use Management and conservation related risks Business management functions related to game ranch management including financial acumen, operations, marketing, sales, maintenance etc. Throughput management of game meat abattoirs approved and other game processes facilities to ensure commercial viability and long-term sustainability 	ST	Sept 2023	March 2025	R 1 million	DFFE DALRRD	
2. Enhance collaboration and educate farmers on co-operative systems, specifically in relation to feasibility and how to collectively promote, supply and add value to game meat	ST MT LT	April 2024	March 2030	R19 million	DALRRD DFFE	

Risks or Dependencies:

If an enabling environment is not purposefully pursued, the barriers to entry in the game meat industry may seem insurmountable by new entrants, thus creating a preference for other land use options considered to be simpler. The lack of education and experience in game ranching and game meat processing is a major gap, especially for new game meat market entrants and PDI's

Potential Funding Instruments:

Self-funding option by trainees / delegates based on market related training offerings

Potential collaboration with AgriSeta (if funded training programmes)

Refer to training service providers list: <https://www.agriseta.co.za/accredited-training-providers-list/>

6.1 Education of New Entrants, CPA's, PDI's, Women and Youth

Intervention #27

Investment Needed: R20 mil

Seda's Cooperatives and Community Public Private Partnership Programme to be considered
National Education Fund

Impact of Intervention (metrics)	Baseline	Target	Actual
Number of PDI's that received training in Years 1 to 3		100	
Number of Women and Youth entering the game meat industry in Years 1 to 3		20	
Number of Women and Youth that received training related to game meat (end to end value chain) in Years 1 to 3		50	
Number of new enterprises and suppliers developed in Years 1 to 3		20	

Table 27: Funding Schemes / Game Donations

6.2 Funding schemes / game donations to enhance industry transformation

Intervention #28

Investment Needed: R100 mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Development of a fund for PDI / new entrants to access land and the Natural Wildlife Production industry	ST/MT	April 2024	March 2027	R10 million	DALRRD DFFE
2. Identification of 3 new PDI ranch owners and obtain financial support to: <ul style="list-style-type: none"> • Procure shares into a commercially viable Natural Wildlife Production <i>or</i> • Procure 3 Natural Wildlife Productions for new PDI market entrants with aim to grow supply for the game meat industry 					DALRRD DFFE
3. 2 Natural Wildlife Productions to be procured through an equity investment scheme of R400,000 (per investor) from 25 PDI investors:	ST/MT	April 2024	March 2027	Equity Investment	DALRRD DFFE

6.2 Funding schemes / game donations to enhance industry transformation Intervention #28 Investment Needed: R100 mil

- Identify potential Natural Wildlife Production for sale
- Develop a high-level business case with financial projections based on the game meat opportunity to determine the ROI to potential investors
- Based on outcomes of the business case create an investment platform ringfenced for PDI Natural Wildlife Productions

4. Unlock game donations based on SANParks' and Provincial Nature Reserves' game donation / loan programme to obtain plains game species for PDI owned Natural Wildlife Productions in order to participate in the game meat production and supply value chain	ST/MT LT	May '24	March '30	Unknown	SANParks Provincial / Local Government Nature Reserves
5. Identification of 5 PDI Natural Wildlife Productions or game meat SMME's to pilot the implementation of game meat abattoirs and / or Processing Facilities. Commit to invest into 5 game meat abattoirs or processing facilities (short term) and agree on process of selection	ST/MT	Sept 2023	March 2027	R10 million	DFFE DALRRD DoH
6. Identification of 5 PDI Natural Wildlife Productions or game meat SMME's per annum (post the pilot to construct game meat abattoirs and / or Game Meat Processing Facilities)	ST/MT LT	Sept 2023	March '30	R80 million	DFFE

Risks or Dependencies:

High-Level Feasibility Studies / Business Plans to be embarked on prior to approval and disbursements of funds to mitigate risks and ensure sufficient throughput towards financial viability / long-term sustainability of RTA's/low throughput/game meat processing facilities with an aim to grow and transform the game meat industry. An important dependency is access to land

6.2 Funding schemes / game donations to enhance industry transformation **Intervention #28** **Investment Needed: R100 mil**

Potential Funding Instruments:

- Feasibility Studies / Business Plans: DTIC
- SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment
- AgriBEE Fund: Acquire shareholding into existing commercially viable enterprises with specific focus on processing and value addition
- Comprehensive Agricultural Support Programme
- Land distribution programme for Agricultural Development
- Equity investment scheme to be established to procure two game ranches similar to Macadamia Nut Investment Project
- SANParks, Provincial and Local Government Nature Reserves' game donation / loan programme(s)
- AFD: Agence Francaise de Developpement
- Industrial Development Corporation
- BIOFIN
- Development Bank of Southern Africa
- GIZ: Deutsche Gesellschaft fur Internationale Zusammenarbeit
- Commercial Banks

Impact of Intervention (metrics)	Baseline	Target	Actual
Number of new PDI Natural Wildlife Productions (ownership)		28	
Number of new PDI Natural Wildlife Productions that has management control		28	
Number of additional / new jobs created		300	
Number of game meat abattoirs approved / Processing Plant Pilots per annum constructed (post feasibility)		45	

Table 28: Funding Schemes for CPA's

6.3 Funding schemes to enhance transformation for CPAs and Traditional Authorities **Intervention #29** **Investment Needed: R30 mil**

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
----------------------------------	-----------------	-------------------	------------------------	-------------------------	--

6.3 Funding schemes to enhance transformation for CPAs and Traditional Authorities **Intervention #29** **Investment Needed: R30 mil**

1. Establish a system / entity for professionally managed community funding for CPAs and Traditional Authorities involved in the wildlife economy (PNR's, Natural Wildlife Productions or mixed farms) and specifically to use CPAs and Traditional Authorities as an ideal platform to grow the game meat industry, and specifically value addition to transform a carcass into a final product	ST MT LT	April 2024	March 2030	R30 million (R10 million in Year 1 then R2,5 mil per annum)	DFFE DALRRD
<ul style="list-style-type: none"> • Involvement of local communities • Independent oversight into fund application • Contributions are spread across the whole community and not enriching a select few 					

Risks or Dependencies:

The CPA management model is unfamiliar or a somewhat foreign form of land management in traditional communities. It is advised to develop a benchmarked business model and apply it as far as possible across all CPAs. There is a need for a CPA development strategy for South Africa as group ownership systems seems to be problematic. Apart from the aforementioned challenges, there are 1 599 registered CPAs in SA, of which only 211 are compliant (based on the CPA Act). There is also a need to support CPAs and Traditional Authorities to access markets to sell their natural game meat products (in the wholesale or retail markets)

Potential Funding Instruments:

- SEDA's Cooperatives and Community Public Private Partnership Programme
- Biodiversity Sector Investment Portal to be used for fund raising purposes based on feasible business plans
- Developmental Grants
- Land Rights Management Facility

Impact of Intervention (metrics)	Baseline	Target	Actual
Number of communities / CPA's involved in the game meat value chain		10	
Number of new jobs created		90	

Table 29: Mentorship Programme

6.4 Ensure inclusivity through a free-market mentorship programme			Intervention #30	Investment Needed: R12 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Develop an incentive system for current game industry stakeholders to assist, mentor and transfer of skills and knowledge to new market entrants (PDI, women and youth ranchers) in: <ul style="list-style-type: none"> • Meat safety examiners • Natural Wildlife Production skills development • Game breeding and extensive farming skills development • Deskinning and de-hiding • Natural Game meat processing skills development • Natural Game meat product development • Natural Game meat marketing and sales skills development • General conformance to statutory requirements and related business management functions 	ST MT LT	April 2024	March 2027	R12 million R4 million per term	DALRRD with support from voluntary Game Meat Industry Association and industry associations such as WRSA, SA Hunters, PHASA, Natshoot, Conservation Outcomes, Meat Naturally etc.	
Risks or Dependencies:						

6.4 Ensure inclusivity through a free-market mentorship programme**Intervention #30 Investment Needed: R12 mil**

Mentorship entails the coordination of training, management, administration, marketing and to be responsible for the overall empowerment of beneficiaries to enable them to operate their game ranches and game meat processing businesses sustainably. Research asserts that it takes a mentor / new farmer at least 1 year to form a successful mentorship-mentee relationship. Priority areas should include but should not be limited to knowledge of game ranching, availability, honesty, listening to the problems of emerging ranchers and actively assist with problem solving techniques

Potential Funding Instruments:

Comprehensive Agricultural Support Programme

Small Enterprise Development Agency

National Development Agency

Integrated Food Security and Nutrition Programme from DALRRD

Alliance for a Green Revolution in Africa

African Development Bank

USDA is working with the Small Business Administration and SCORE and could offer free business mentoring services to ranchers

Old Mutual's Masisizane Fund

Impact of Intervention (metrics)**Baseline****Target****Actual**

Number of PDI's, women and youth that received mentorship, skills development and capacity building

100

Number of mentors assisting PDI, women and youth ranchers and other value chain actors

25

Increase proportion of restituted land that is developed/retained for game ranching

TBD

Identification and mapping of land with potential for game ranching

TBD



SO 7: Skills, Knowledge and Sector Awareness

Table 30: Skills Development to increase integrity, safety and meat quality

7.1 Skills development to ensure meat integrity, safety and quality			Intervention #31	Investment Needed: R46 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Embark on a campaign to ensure all value chain actors from PH's, Outfitters, Ranch Owners, Harvesters, Subsistence Hunters and specifically new entrants receive training in basic meat safety inspection programmes to ensure improved meat safety and compliance. Such training programme should contain the following modules (as a minimum):	ST	April 2024	March 2027	R6,000,000	DALRRD	
	MT	March 2027	April 2028	R20,000,000	DFFE	
	LT	March 2028	March '30	R20,000,000		
<ul style="list-style-type: none"> • Hunting • Ammunition used (lead-free is preferred) • Handling of carcass (in veld) post hunting • Microbiology • General layout of an abattoir • Personal hygiene • Handling of waste and condemned material, including appropriate disposal of lead contaminated waste meat and body parts • Pest control • Sanitation • Quality and safety control systems • Slaughter and dressing of the carcass • Anatomy • Pathology • Disease and conditions • Meat inspection process 						

7.1 Skills development to ensure meat integrity, safety and quality **Intervention #31** **Investment Needed: R46 mil**

<ul style="list-style-type: none"> • Biodiversity conservation and environmental risks and mitigation measures • Climate change • Basic understanding of the Game Meat Regulations governed by the Meat Safety Act 40 of 2000 						
2. Develop capacity for game meat inspections through:	ST	Oct '23	April '24		Unknown	DALRRD
<ul style="list-style-type: none"> • Increased number of game meat examiners 	MT	March '24	April '27			DoH
<ul style="list-style-type: none"> • Auditing of processing facilities (specifically butcheries) 	LT	March '27	March '30			Supported by Game Meat Industry Association
<ul style="list-style-type: none"> • Establish training functions under mandate of Game Meat Industry Association 						

Risks or Dependencies:

Game meat safety protocols based on the game meat regulations are not followed by all hunters, harvesters and game meat abattoir owners. It is prudent to ensure that more emphasis be placed on game meat inspection

Potential Funding Instruments:

Personal funding for Meat Safety Course
 Small Enterprise Development Agency
 National Development Agency
 Integrated Food Security and Nutrition Programme from DALRRD

Impact of Intervention (metrics) **Baseline** **Target** **Actual**

Increase in number of meat safety examiners (target to be determined by results of supply and demand analysis)				Unknown
Increase in number of PDI's as meat safety examiners (target to be determined by results of supply and demand analysis)				Unknown
Increase in number of women and youth as meat safety examiners	10%			50%
Campaigning and source funding for training initiatives (1 = Yes / 0 = No)				1

7.1 Skills development to ensure meat integrity, safety and quality	Intervention #31	Investment Needed: R46 mil
--	-------------------------	-----------------------------------

List of training service providers under voluntary Game Meat Industry Association’s mandate (1 = Yes / 0 = No) 1

Table 31: Consumer awareness campaigns, marketing and education

7.2 Consumer awareness campaigns, marketing and education	Intervention #32	Investment Needed: R42,5 mil
--	-------------------------	-------------------------------------

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Consumer marketing / awareness campaigns and education	ST	Sept 2023	March 2027	R2,500,000	DoH, Department of Tourism Voluntary Game Meat Industry Association RASA, FEDHASA
	MT	March '24	April '27	R20,000,000	
	LT	March '27	March '30	R20,000,000	
<ul style="list-style-type: none"> • The nutritional / health value of natural game meat • The health aspects and benefits of natural game meat • The availability of different natural game meat products for all consumer types • The ethics and impact on conservation of the game meat industry linked to Natural Wildlife Production, harvesting and hunting • Natural Game meat preparation and recipes 					
2. Develop scope of services and accompanying TOR for a service provider to:					Voluntary Game Meat Industry Association

7.2 Consumer awareness campaigns, marketing and education

Intervention #32 Investment Needed: R42,5 mil

- Do research and set goals per topic
- Determine the most appropriate timing of the campaign(s)
- Identify and define audience(s)
- Craft appropriate awareness campaign messages, look and feel, the format of such which could be a hybrid of social media and other campaigns using mediums such as infographics, videos, blog posts, email campaigns, webinars coupled with conventional marketing and advertising campaigns
- Start the campaign
- Measure results to determine success of the campaign

Risks or Dependencies:

There is a need for consumer awareness and education to grow the game meat industry (thus a need for more consumers to purchase game meat products)

Potential Funding Instruments:

Small Enterprise Development Agency
 National Development Agency
 Department of Trade and Industry
 Agriculture Fast Track Fund / African Development Bank Group

Impact of Intervention (metrics)

	Baseline	Target	Actual
Increased consumer awareness (impact study to be done) (1 = Yes / 0 = No)		1	
Availability of information on an integrated platform (1 = Yes / 0 = No)		1	
Generic promotion of game meat as a healthy protein source (1 = Yes / 0 = No)		1	

Table 32: Education related to Game Meat Processing

7.3 Education related to Game Meat Processing			Intervention #33	Investment Needed: R42,5 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Develop an educational campaign for all value chain actors aimed at:	ST	Sept 2023	Dec 2024	R2,500,000	DALRRD	
	MT	March '24	April '27	R20,000,000	DoH	
	LT	March '27	March '30	R20,000,000	Voluntary Game Meat Industry Association	
<ul style="list-style-type: none"> • Pre- and post-hunting handling of game, meat and value addition • Meat quality determination for value guarantee • Post slaughter procedures and products to enhance commercial adequacy with strong focus on meat safety and removal of any lead contamination • Usage of all products from game including offal and other value-added or by-products 						
2. Develop scope of services and accompanying TOR:					Voluntary Game Meat Industry Association	
<ul style="list-style-type: none"> • Do research and set goals related to topics • Determine the most appropriate timing of the campaign • Identify and define audience(s) • Craft appropriate awareness campaign messages and the format of such which could be a hybrid of social media and other campaigns using mediums such as infographics, videos, blog posts, email 						

7.3 Education related to Game Meat Processing **Intervention #33** **Investment Needed: R42,5 mil**

campaigns, webinars coupled with conventional marketing and advertising campaigns

- Start the campaign
- Measure results to determine success of campaign

3. Leverage on meat processing training provided by food retail companies learnership programme for meat processing	ST	Sept 2023	Dec 2024	Unknown	PPP
---	----	-----------	----------	---------	-----

Risks or Dependencies:

Information used for these campaigns should emanate from empirical research

Potential Funding Instruments:

Internship programmes facilitated and sponsored by major retailers
 Self-funded training programmes offered by various tertiary education institutions and / or TVET colleges and / or ABET and / or industry associations
 AgriSETA Discretionary Grants
 National Skills Fund

Impact of Intervention (metrics)	Baseline	Target	Actual
Increase in number of value chain actors trained		500	
Number of interns trained through the Shoprite / Checkers Learnership Programme (for game meat processing)		100	

Table 33: Capacity Building Programmes aimed at promoting biodiversity conservation

7.4 Establish capacity building programmes aimed at promoting biodiversity conservation **Intervention #34** **Investment Needed: R20 mil**

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
----------------------------------	-----------------	-------------------	------------------------	-------------------------	--

7.4 Establish capacity building programmes aimed at promoting biodiversity conservation			Intervention #34	Investment Needed: R20 mil	
1. Develop and implement an integrated capacity building plan that empowers new entrants to the industry, emerging ranchers, and traditional communities, including traditional leadership, private sector, to develop capacity through training, workshops and mentorship in the Wildlife Economy sector focusing on:	ST	March '24	Dec '24	R 300,000	DFFE
	MT	March '24	April '27	R10,000,000	Management Authorities SANBI
<ul style="list-style-type: none"> • Promoting environmentally friendly practices such as sustainable land management that contribute to natural habitat and vegetation conservation on the game farm/ wildlife ranch • Game species adaptation when translocated and their effects on biodiversity (e.g ecologically sustainable game densities in a camp) • Ethical practices and standards for wildlife management and use in South Africa (e.g Sustainable Wildlife Economy Standards (SWES)) • Capacity to harness the technological advances such as DNA technology and database, biobank • Natural Wildlife Production Models (intensive versus extensive production systems; captive-bred animals; breeding camps, import, translocation and genetic manipulation of wildlife; and hunting/harvesting methods including types of ammunition) • Management of small predators within the game farm/ wildlife ranch • Constitutional mandate of the environment sector 					

7.4 Establish capacity building programmes aimed at promoting biodiversity conservation

Intervention #34 Investment Needed: R20 mil

- Importance of veterinary care services to treat game animals for diseases
2. Improve the capacity of SANBI to provide technical and scientific support to the wildlife sector
- SANBI

MT March '24 April '27 R7,700,000

Risks or Dependencies:

Skills level of relevant institutions to deliver the required capacity building

Potential Funding Instruments:

- National Treasury
- DFFE
- BIOFIN
- GEF
- Management Authorities
- Other Donor Funds

Impact of Intervention (metrics)

Baseline Target Actual

Increase in number of new entrants to the industry, emerging ranchers, and traditional communities, including traditional leadership, private sector trained 500

Number of SANBI Officials dealing with Wildlife Economy 20



SO 8: Marketing, Branding, Sales and Communications

Table 34: Branding Business Case

8.1 Branding Business Case		Intervention #35		Investment Needed: R91,5 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Develop a business case related to the branding of game meat products:						
<ul style="list-style-type: none"> • To improve the quality / integrity of game meat • National and / or regional brand versus own brand • Explore co-branding opportunities • Embark on brand building activities • Provide tools for branding (e.g. free range, lead free ammunition) 	ST/ MT	April '24	March '27	R15,000,000	DALRRD	
	LT	April '27	March '30	R15,000,000	NAMC	
2. Development of a brand to promote South African game meat:						
<ul style="list-style-type: none"> • Develop a single brand for game meat for: <ul style="list-style-type: none"> ○ Marketing purposes locally and internationally through one brand campaign ○ Proudly South African endorsement ○ Meat safety and quality endorsement ○ Encouragement to use game meat and / or species name instead of venison for the local market • Encourage current and new stakeholders to utilise new brand, either: <ul style="list-style-type: none"> ○ In its entirety; or ○ Using co-branding with own brand 	ST	April 2024	March 2030	R40,000,000	Voluntary Game Meat Industry Association, DoT, RASA, FEDHASA	
	MT					
	LT					
3. Focused Product Naming Convention on labels (as a Unique Selling Proposition (USP)):						
	ST/MT	April 2024	March 2027	R10,000,000	Voluntary Game Meat Industry Association	

8.1 Branding Business Case

Intervention #35 Investment Needed: R91,5 mil

<ul style="list-style-type: none"> Free range, organic and lead-free meat, where this can be verified (not all game meat can be branded as such until certification standards and traceability can be implemented and audited) Replacing the word “venison” with “game meat” Species specific (e.g. springbok) Product specific (e.g. biltong) Local language (as a USP) 						
4. Utilising public figures or trend setting individuals as Brand Ambassadors including Restaurant groups and outlets to establish awareness	ST MT LT	March '24	April '27	R5,000,000	Voluntary Game Meat Industry Association, DoT, RASA, FEDHASA	
5. Develop specific product and cut brands (e.g. “bully beef” or “bully game”): <ul style="list-style-type: none"> Specific / special natural game meat cuts with advice on product and how to prepare, or with complimentary recipes Processed products Procurement of service provider 	MT/LT	March 2027	April 2028	R2,000,000	Voluntary Game Meat Industry Association , DoT, RASA, FEDHASA	

Risks or Dependencies:

Dependency on outcomes of the game meat business case, marketing and sales strategy

Potential Funding Instruments:

The Department of Trade, Industry and Competition, Department of Tourism
 The Industrial Development Corporation
 Development Bank of South Africa

8.1 Branding Business Case		Intervention #35	Investment Needed: R91,5 mil		
Impact of Intervention (metrics) (1 = Yes / 0 = No)			Baseline	Target	Actual
Show the value of a regional or national brand value proposition(s)				1	
Assessment of branding value at all levels (is it worth the premium paid)				1	
A new “brand” for game meat in SA developed and actors encouraged to use instead of venison				1	
Focused campaign to move from venison to game meat brand (and specie specific, where possible)				1	
A number of public figures contracted as brand ambassadors				1	

Table 34: Marketing and Communications about Game Meat

8.2 Interventions related to marketing and communication			Intervention #35	Investment Needed: R3 million		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Facilitation of specific government funded interventions, such as: <ul style="list-style-type: none"> Game Meat Indaba to launch the Game Meat Strategy Wildlife economy conference and trade exhibition by government availability over the Short to Medium Term Expenditure Framework period 	ST	Sept 2023	March '24	R3,000,000	DALRRD DFFE Voluntary Game Meat Industry Association	
2. Build relationships with retail companies for partnerships towards: <ul style="list-style-type: none"> Sustainable supply of game meat Marketing of game meat as part of retailers' marketing campaigns 	ST MT LT	Sept 2023	March '24 March '27 March '30	Unknown	DALRRD through agencies such as NAMC Voluntary Game Meat Industry Association	

Risks or Dependencies:
Dependency on outcomes of the game meat business case, marketing and sales strategy

8.2 Interventions related to marketing and communication

Intervention #35 Investment Needed: R3 million

Potential Funding Instruments:

Retailers to fund marketing campaigns (in-store)

Ranchers to assist retailers to do some campaigns such as in-store tastings

Game Meat Indaba to be funded by National Government / Treasury

Potential crowd funding options or game auctions to be considered (with donations) as a prospective PPP

Impact of Intervention (metrics) (1 = Yes / 0 = No)

Baseline Target Actual

Marketing interventions and events concluded

1

Improvement of reputation of the product (and not so much the brand) based on impact studies

1

New enterprises and jobs created in the envisaged expanded game meat industry

1

Improvement in food security through the availability of an additional protein source

1

Table 36: Marketing Campaign

8.3 Marketing Campaign to Create Consumer Awareness

Intervention #37 Investment Needed: R41,5 mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Develop a marketing campaign to:	ST	Sept 2023	March '24	R1,500,000	DALRRD/DFFE/ DoT RASA, FEDHASA
<ul style="list-style-type: none"> Create consumer awareness of natural game meat products 	MT	April '24	March '27	R20,000,000	
<ul style="list-style-type: none"> Develop demand through consumer education 	LT	April '27	March '30	R20,000,000	Voluntary Game Meat Industry Association
<ul style="list-style-type: none"> Focus on urban areas and grass root level consumers 					
<ul style="list-style-type: none"> Promote natural game meat as a source of food security 					

Risks or Dependencies:

Dependency on outcomes of the natural game meat business case, marketing and sales strategy

8.3 Marketing Campaign to Create Consumer Awareness

Intervention #37 Investment Needed: R41,5 mil

Potential Funding Instruments:

Grants or sponsorship from companies such as SA Breweries, Anglo American and other major retailers that sell natural game meat products etc.
 Small Enterprise Development Agency
 Development Bank of SA
 National Government Funded

Impact of Intervention (metrics)	Baseline	Target	Actual
Improved consumer awareness measured through increased sales of natural game meat products in the retail market	6,000t	40,000t	

Table 36: National Game Meat Sales Plan

8.4 Develop a National Game Meat Sales Plan

Intervention #37 Investment Needed: R5 million

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Develop a national game meat sales plan with specific reference to:	ST				DALRRD
<ul style="list-style-type: none"> Negotiating contracts with wholesalers and retailers Online selling platforms such as HelloChoice 	MT	April '24	March '27	R2,500,000	Voluntary Game Meat Industry Association
	LT	April '27	March '30	R2,500,000	

Risks or Dependencies:

Dependency on outcomes of the game meat marketing and sales strategy

Potential Funding Instruments:

Grants or sponsorship from companies
 Small Enterprise Development Agency
 Development Bank of SA
 National Government Funded

Impact of Intervention (metrics)	Baseline	Target	Actual

8.4 Develop a National Game Meat Sales Plan

Intervention #37 Investment Needed: R5 million

Developed National Game Meat Sales Plan (1 = Yes / 0 = No)

1

Table 38: Game Meat Marketing Events / Exhibitions

8.5 Game Meat Marketing Events / Exhibitions

Intervention #39 Investment Needed: R30,5 mil

Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
1. Marketing events:	ST	April 2024	March '24	R500,000	DALRRD & DFFE
• Cooking shows with game meat as protein	MT	April '24	March '27	R15,000,000	Voluntary Game Meat Industry Association
• Access to game meat using Uber Eats and Mr Delivery	LT	April '27	March '30	R15,000,000	
• Wildlife / game meat shows / festivals					
• Specials at lodges, restaurant chains or retailers					

Risks or Dependencies:

Dependency on outcomes of the game meat marketing and sales strategy

Potential Funding Instruments:

Grants or sponsorship from companies

Small Enterprise Development Agency

National Government Funded

Impact of Intervention (metrics)

Number of Game Meat Related Marketing events hosted per Annum (propose 1 per month)

Baseline

Target

Actual

12

Table 39: SPV to Create an Incubation Fund

8.6 SPV to Create an Incubation Fund		Intervention #40		Investment Needed: R31 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
Development of an incubation fund as a resource mobiliser within the realm of a SPV to enable the following:	ST	April 2024	March '27	R1,000,000	DFFE, DSBD	
	MT	April '27	March '28	R15,000,000	Game Meat Industry Association	
	LT	April '28	March '30	R15,000,000	Game Meat Industry Association	
1. Development of a supply and marketing strategy for game meat retail that covers:						
<ul style="list-style-type: none"> Collective supply channels to enable consistent supply Pricing model with retailers to enable a viable option for ranchers and game meat product processors Still allow direct access to retail outlets by industry stakeholders 						
2. Develop a pricing, promotion strategy and model to:						
<ul style="list-style-type: none"> Establish base prices for specific market segments, however, ensure that monopolistic approaches are not prevalent (which could contravene fair competition rules) Encourage adherence to these baseline prices with allowable variation 						
3. Develop scope and TOR that details, as a minimum, how such a fund could operate to generate sufficient revenue to grow the retail game meat market complemented by an integrated marketing and sales strategy inclusive of:					Game Meat Industry Association	

8.6 SPV to Create an Incubation Fund

Intervention #40 Investment Needed: R31 mil

- Target market / customer profile
- Market and competitive analysis
- Different product ranges
- Pricing of product ranges and how it compares to other sources of proteins
- Sales activities
- Advertising
- Promotional campaigns linked to public relation campaigns
- Branding

Risks or Dependencies:

Dependency on outcomes of the game meat business case

Potential Funding Instruments:

Grants or sponsorship from companies
Small Enterprise Development Agency
National Government Funded

Impact of Intervention (metrics)

Baseline

Target

Actual

Developed Marketing Strategy to grow the Game Meat Industry (1 = Yes / 0 = No)

1



SO 9: Enabling Development of Large Commercial Ventures in the Game Meat Sector

Table 40: Developing a business case for the construct large enterprises for agro-ecological production systems, harvesting, and natural game meat processing within the respective Biodiversity Economy Node

9.1 Feasibility to construct large enterprises for agro-ecological production systems, harvesting, and natural game meat processing			Intervention #41	Investment Needed: R20 mil		
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency	
1. Develop generic business plans for large enterprises for agro-ecological production systems, harvesting, and natural game meat processing. <ul style="list-style-type: none"> • Take stock of existing initiatives such as Agriparks and identify areas of collaboration • Conducting a feasibility study within each on Biodiversity Economy Node viability of establishing new large enterprises for agro-ecological production systems, harvesting, and natural game meat processing • Based on the outcomes of the feasibility study, developed bankable business plans for viable large enterprises for agro-ecological production systems, harvesting, and natural game meat processing 	MT	March 2025	Mar '2027	R20,000,000	DFFE	
2. Facilitate access to venture capital to initiate enterprises, especially led by PDIs, women and youth, including from	MT	March 2025	Mar '2027			

9.1 Feasibility to construct large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

Intervention #41

Investment Needed: R20 mil

government sources, development agencies, and the private sector.

- | | | | | |
|----|---|----|------------|-----------|
| 3. | Identify and remove barriers to initial success for ventures. | MT | March 2025 | Mar '2027 |
|----|---|----|------------|-----------|
- Facilitate training programmes for new personnels
 - Facilitate Market linkage
 - Partner with the private sector for mentorship
 - Enhance the Nodal Model to ensure economies of scale and constant supply

Risks or Dependencies:

Lack of buy-in from farmers within the respective BEN.

Potential Funding Instruments:

Feasibility Studies / Business Plans: DTIC

SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment

Comprehensive Agricultural Support Programme

Impact of Intervention (metrics) (1 = Yes / 0 = No)

Baseline Target Actual

Develop a practical, economically feasible and successful model constructing and operating large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

Completed feasibility studies and bankable business plans for large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

1



SO 10: Enabling Development of Large Game Production and associated Value Chain in Community Owned Areas

Table 41: Establishment of 5 viable community-owned large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

10.1 Feasibility to construct 5 community-owned large enterprises for agro-ecological production systems, harvesting, and natural game meat processing		Intervention #42		Investment Needed: R10 mil	
Description of Activities	Priority	Start Date	Completion Date	Investment Needs	Responsible Dept or Implementing Agency
<p>1. Undertake strategic land-use planning to identify five potential community areas for reintroduction of plains game, where this is ecologically viable, and will maximize return on investment for socio-economic development.</p> <p>2. Develop generic business plans for large enterprises for agro-ecological production systems, harvesting, and natural game meat processing.</p> <ul style="list-style-type: none"> • Take stock of existing initiatives such as Agriparks and identify areas of collaboration • Conducting a feasibility study within each on Biodiversity Economy Node viability of establishing new large enterprises for agro-ecological production systems, harvesting, and natural game meat processing • Based on the outcomes of the feasibility study, developed bankable business plans for viable large enterprises for 	MT	March 2025	Mar '2027	R10,000,000	DFFE

10.1 Feasibility to construct 5 community-owned large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

Intervention #42

Investment Needed: R10 mil

	agro-ecological production systems, harvesting, and natural game meat processing			
4.	Facilitate access to venture capital to initiate enterprises, especially led by PDIs, women and youth, including from government sources, development agencies, and the private sector.	MT	March 2025	Mar '2027
5.	Identify and remove barriers to initial success for ventures. <ul style="list-style-type: none"> Facilitate training programmes for new personnel and business owners Facilitate Market linkage Partner with the private sector for mentorship Enhance the Nodal Model to ensure economies of scale and constant supply 	MT	March 2025	Mar '2027
6.	Undertake a feasibility study of investing in a community-owned internationally-compliant game meat abattoir.			

Risks or Dependencies:

Lack of buy-in from community entities within the respective BEN.

Inefficient support from government and private sector

Potential Funding Instruments:

10.1 Feasibility to construct 5 community-owned large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

Intervention #42

Investment Needed: R10 mil

Feasibility Studies / Business Plans: DTIC

SEDA / SEFA: Game Meat Processing Facilities and related Operational Equipment

Comprehensive Agricultural Support Programme

Impact of Intervention (metrics) (1 = Yes / 0 = No)

Baseline

Target

Actual

Develop a practical, economically feasible and successful model constructing and operating large enterprises for agro-ecological production systems, harvesting, and natural game meat processing

1

Completed feasibility studies and bankable business plans for large enterprises for agro-ecological production systems, harvesting, and game meat processing

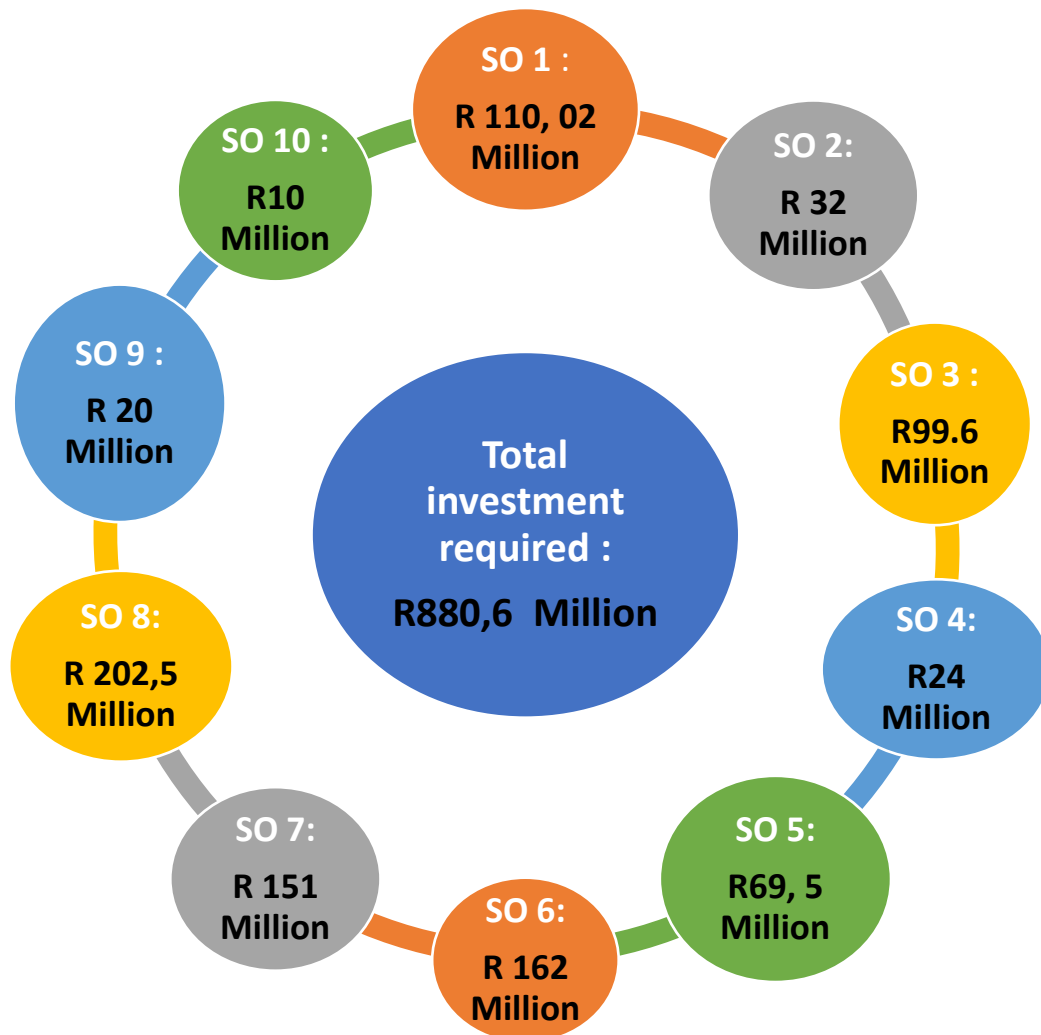


Investment Needs and Return on investment

11. Investment Needs

11.1. Investment needs

The investment needs over the short-, medium- and long-term is R 880, 6 Million to duly implement 42 interventions proposed in the strategy as graphically depicted in figure below:



It is envisaged that the funding will be acquired through blended-financing models between government and private sector and from the fiscus budget. Importantly, effective partnerships will be initiated with existing funded initiatives such as Agriparks to leverage funding.