

A photograph of a herd of water buffaloes in a dry, grassy field. The buffaloes are dark-colored with prominent, curved horns. The text is overlaid on the image.

VISION 2024

Green Economy: Wildlife Based Land Reform Support Programme

**People and Parks 10 years later
9-11 September 2014, Umthatha**

Vision 2024

“rapid socio-economic transformation and growth of wildlife economy while ensuring the entry and ascendance of the emerging game farmers into the mainstream of the South African economy.”



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National Biodiversity Environment and Development Strategy Problem Statement

*Addressing **food insecurity**, generating **viable rural economies**, achieving **equity** towards **ownership** and **access** to natural biological assets and contributing towards the green economy from the use of biodiversity, is not well coordinated nationally.*

*This is due largely to purposeful but limited and **fragmented development interventions** within the indigenous natural products and wildlife sectors, **lack of transformation** and incentive schemes, a **lack of strong national strategy** for conception, **coordination** and reporting on achievements of interventions that are built on a robust biodiversity economy, **especially for the rural poor**.*



Strategic Objective

- Specifically the objectives of Vision 2024 is to ensure:
 - **Empowerment** of community land owners and beneficiaries through **Fair Access** and **Equitable Sharing** of benefits arising from wildlife economy.
 - **Expansion** of conservation areas through incorporation of community unproductive land and game reserves with a view to stimulating sustainable local economic growth and conservation.
 - **Development** and **Restoration** of the degraded environment and improvement of infrastructure and land use for community benefit and advancement.
 - **Broadening and meaningful participation** of youth and women in the mainstream wildlife economy through shareholding, skill training and entrepreneurship.



Vision 2024 Key Deliverables

- **Jobs:** 60 000 beneficiaries and new sustainable jobs created in the whole wildlife economy industries
- **Expansion:** 2 million ha of communal land restored and developed for conservation and commercial game ranching
- **Equity:** R7 billion: R4 billion in game and R3 billion on fixed assets and infrastructure resulting in improved rural income, skills development, institutional capacity building, entrepreneurship and food and environmental security.
- **Conservation and Game Improvement:** 300 000 heads of wildlife under black empowered and owned ranches.

Need investment of about R3.5 billion over the next 10 years to achieve the Vision 2024.



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Wildlife Economy in SA

- SA leads global fraternity of wildlife ranching and generate an income of **R9.1 billion** a year (0,27% of GDP).
- Measured in T/O growing at average 20,3% a year
- A from 3 in 1960, 3500 in 1992 to 10 000 game farms occupying 16,8% of SA land.
- Grown from less than 2million in 1979 and covers about **21million ha**....3 times bigger than state PAs
- 50% in Limpopo, 19% in NC, 12% EC
- **18,5 million heads** of game are in private farms and this is four times more than number in state PAs
- Employs more than **100 000** people....bigger than sugarcane and dairy



The Wildlife Industry's contribution to: Sustainable agriculture and land use:

- 10 000 “adequately enclosed” title deeds
- 3 000 game ranchers
- Total of 21 million ha
 - 17% of SA’s surface area
 - 50% thereof in Limpopo Province



**All formerly marginal agricultural land
converted into an economically sustainable
form of land use.**



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The Wildlife Industry's contribution to: Food Security

- Provides >20% of meat eaten in SA during the 6 hunting months .

SA Meat production annually	(ZAR)
Value	R 24 billion
Imported	R 6 billion
Exported game meat	R 200 million
Potential game meat export	>R 4 billion

13,5 million cattle and 18,5 million game

This is SA's unique competitive edge



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The Wildlife Industry's contribution to: Jobs and rural development

- Employs more than **100 000** people....
- 3 x more workers per farm
- 3 x higher pay due to higher skills requirement
 - Hunting (skinners & trackers)
 - Hospitality (Chefs, waiters, cleaners)
 - Security, laundry

bigger than sugarcane and dairy



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The Wildlife Industry's contribution to: Conservation

- A from 3 in 1960 to 10 000 game farms occupying 16,8% of SA land.
- Grown from less than 2million in 1979 and covers about **21million ha**....3 times bigger than state PAs
- 12%: International norm for "conserved areas"
- 18.5 million head of game in private farms

than any time over the past
164 years (1850)!



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Why game ranching as a new game changer?

- Generates R220/ ha of economic output (Average R80 a ha for livestock farms)
- Employs 3 times more people
- Requires lower water, grows faster, earlier maturity and ability to put on weight in grazing conditions
- Promotes conservation and biodiversity
- Less impacted by bush encroachment and diseases thus easy to observe and control
- Not dependant on grain based feeds...lower input cost
- Formal and informal livestock auctions generate as much as R500m each year
- SANPARKs reported total revenue of R816m from tourism, retail and concessions
- New Zealand it is generates annual income of R4 billion in venison.
- Requires more labour-intensive care (3X more jobs): fences, firebreaks etc
- R5m invested in cattle over 5years the ROI is 4,8%, for the same amount and period in sable antelope the ROI is 45,2%



Zintle Zombini



The opportunities

- Most emerging ranchers and landholders already involved as livestock farmers and labourers.
 - participation remains passive and at most filling up of jobs
- By the of 2013, almost 76 500 land claims had been settled...black people now own land
- 400 000 ha of game farms currently under land claim (some settled and transferred already)
- However, critical skills for commercial operation e.g hospitality, guiding, game management, breeding, negotiation highly specialized
- Land ownership is not enough,
 - tragedy of the commons (e.g infighting between land claimants, communities and TA)
 - weak local institutional capacity,
 - poor governance,
 - lack of resources and skills,
 - access to markets etc



Wildlife Economy Market Segmentation



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Where is the Money?

- **Live game sales:**
 - About 18 200 game animals traded in 2012 at 58 auctions generating R960 million
 - Buffalo sold for R40 million last year breaking all records
- **Hunting: (trophy and biltong)**
 - About R7.1 billion annually and vital to SA economy
 - 14000 hunters visiting the country annually (270 000 local)
 - While slain animal kept as a trophy, the carcass for food security.
 - Hunting prices vary from R350k for elephant, R140k for buffalo to R5k for bushpig
- **Game meat-venison:**
 - Western Europe consume more 100 000T per yr
 - SA exports 600-2000T per yr valued R60 to R200 million
 - NZ exports 40 000T (70 000sp)per yr valued at approximately R4 billion
 - World supply of venison is still short of 60 000T



Where is the Money?

- **Eco-tourism**
 - leisure, game viewing, business tourism and lodging
- **Beneficiation and value chain industries**
 - Taxidermy & Biltong
 - Meat production
 - Maintenance e.g fence, plumbing etc
 - Bush clearing, firebreaks
 - Laundry
 - Guiding
 - etc



Big Five and Dangerous Game Trophy Fees

TROPHY NAME	Trophy fee in 2014 IN \$
BUFFALO	14,500
CROCODILE	7,450
ELEPHANT	35,000
LION	22,000
LIONESS	9,000
LEAPARD	15,000
HIPPOPOTANUS	9,400



Plains game trophy fees

SELECTED TROPHY NAME	TROPHY FEES IN \$
BLACK WILDERBEEST	1,200
BONTEBOK	1,750
BUSHPIG	450
ELAND	2,650
IMPALA	480
KUDU	2,600
NYALA	2,900
OSTRICH	650
SABLE ANTELOPE	11,500
SPRINGBOK-BLACK	1,450
SPRINGBOK-COMMOM	480
SPRINGBOKWHITE	950
WARTHOG	350
ZEBRA-MOUNTAIN	2,800



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Shared commitment: A Community Private Public Partnership

- Community consultation: e.g LEWRA
- Established implementation committee with DRDLR (Land reform)
- Presented to CLCC and DAFF (food security and veterinary services)
- Structuring MOUs with WRSA, CHASA
- Engaging with NEF and Land Bank
- Vumelana AF and CATHSSETA

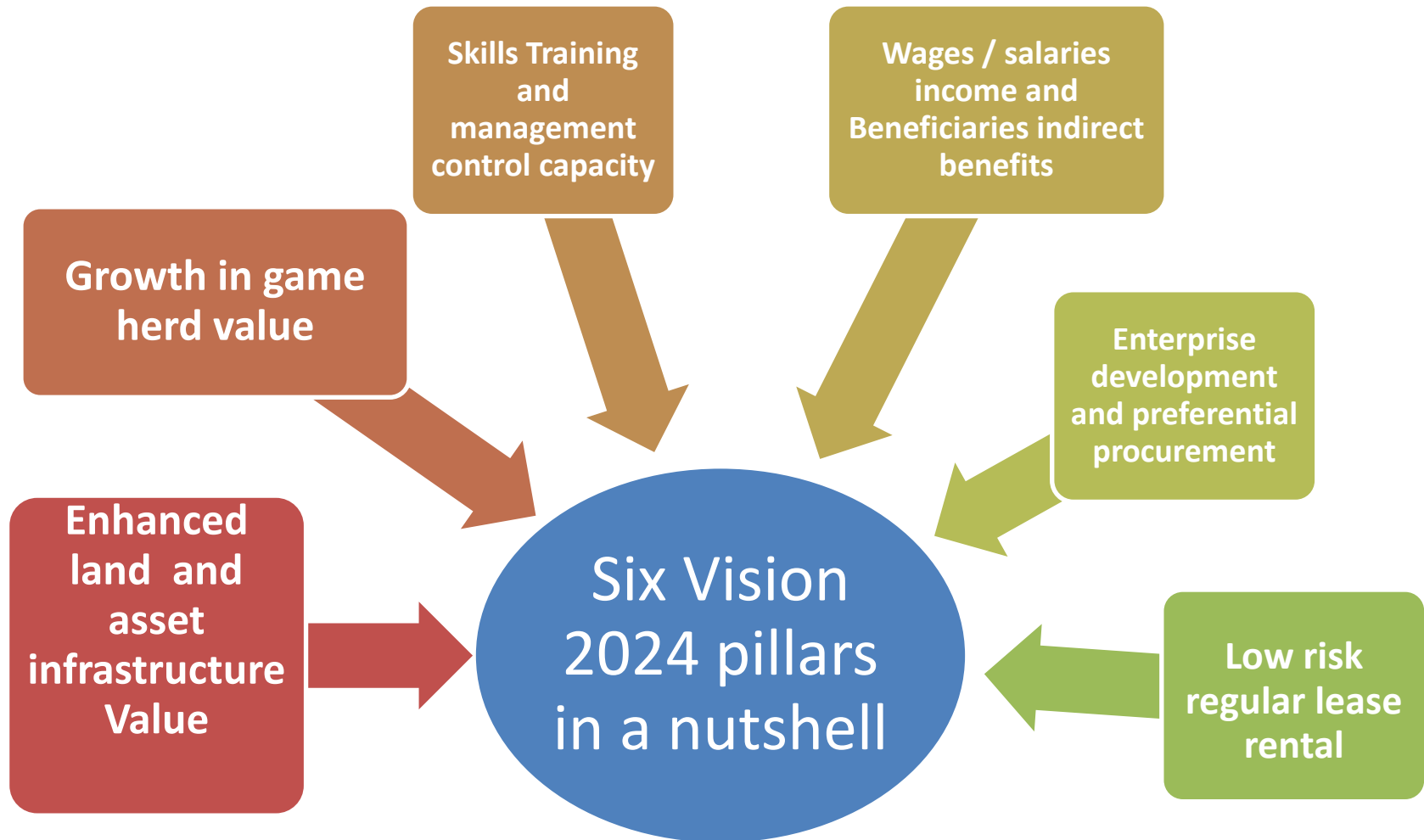


Shared commitment: A Community Private Public Partnership

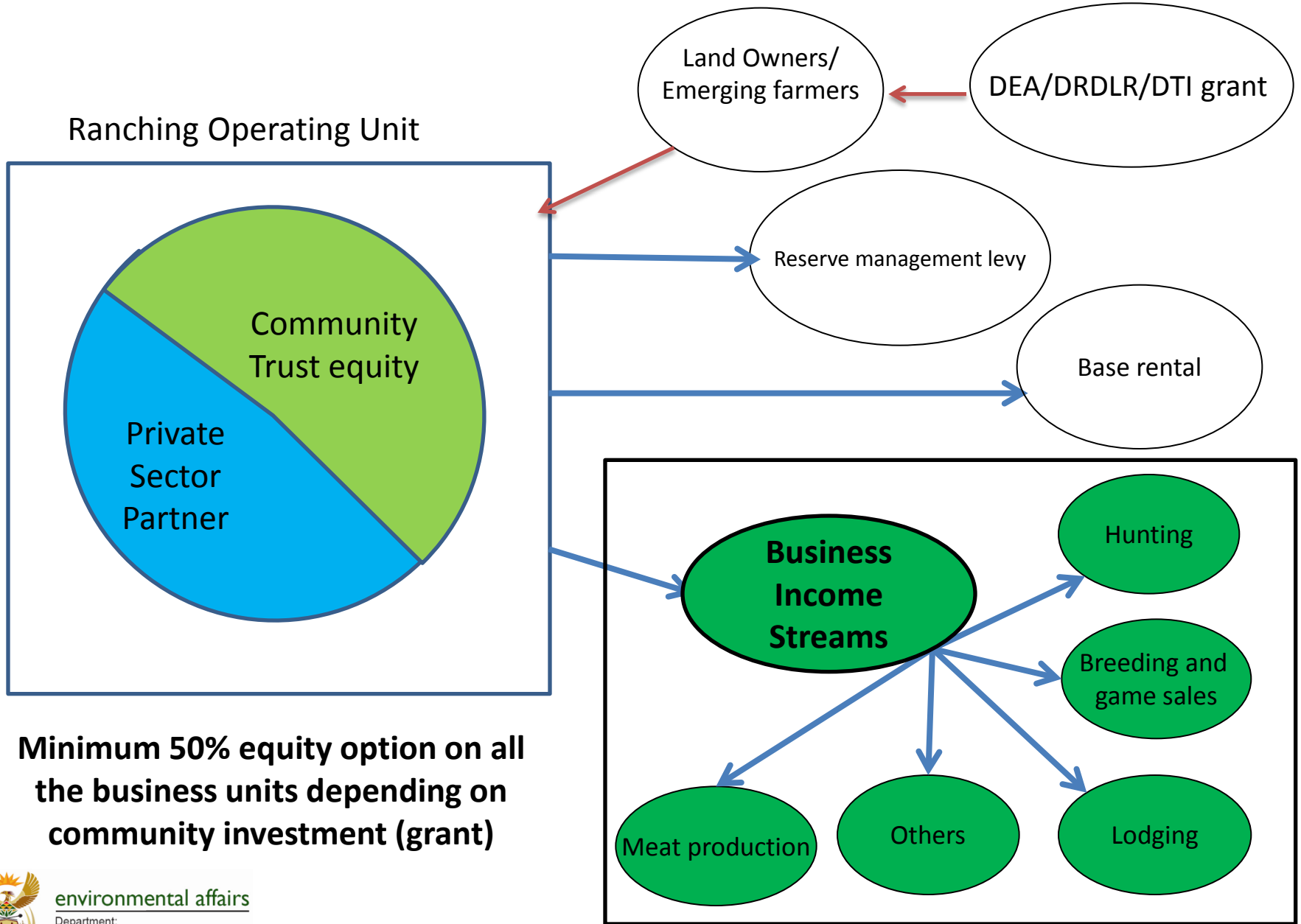
- **Transitioning** from projects to good business and **leveraging** on different capacity
- **Private Sector:** will deliver **sound game management, access to the markets, improve productivity, guarantee reliability, ensure profitability and sustainability**
 - up-front capital investment e.g working capital and operational infrastructure
 - Employment equity and manages the operations in partnership with landholders
- **Government:** **grant funds** for long term investments and for incubators for new business as well mentoring a new generation of emerging farmers
 - develop buildings and **infrastructure, fencing, restoration of land, game purchase or donation,**
 - **Upskilling, extension and veterinary services, enterprise development, tax incentives etc**
- **Emerging game farmers and Communities remain land owners and provide land and labour**



The Cascade Effect: Opportunities for Investment in Pro-poor economic growth



WEB Community Private Partnership Arrangements



Minimum 50% equity option on all the business units depending on community investment (grant)

Community Private Partnership models

Joint Venture and Share Equity

- Approach: The community landowner has minimum 50% equity option on all the business units depending on government/community investment (grant)
- While land ownership remains with landholders, both commercial partners and communities make joint decisions about operations and commercial risk.

Conservancy

- Approach: A model for commercial wildlife ranchers and neighbouring landowners or emerging farmers seeking to work together for higher returns than if work individually.
- The guiding principle is that land ownership is retained. Cost of development and management as well as benefits will be shared according to the level of investment by each participant.

Community Private Partnership models

Wildlife Incubators

- **Approach:** Community beneficiaries must be land owners. They will receive donated game (**nucleus herd**) and infrastructure improvements for which a contractual commitment is to adhere to the program objectives for at least 5 years.
- The beneficiaries will over the agreed period return back or redistribute 50% of all progeny. The original game including the balance of progeny resulting from good management will remain with the beneficiaries.

Vision 2024

- **Inputs:** the success depends on the, game donation, infrastructure, partnerships, mentorships, coaching, training, enterprise development, resource mobilisation etc
- **Expected results:** the emerging farmer gaining experience in breeding, game management, auctioning etc



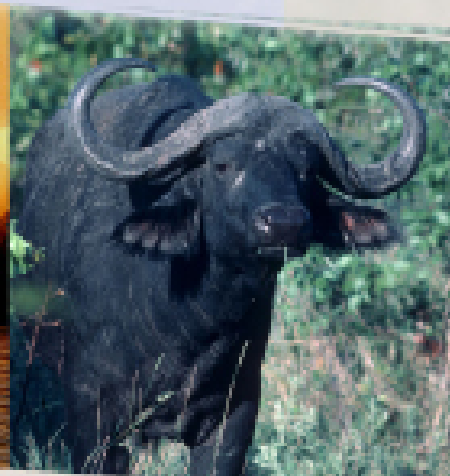


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The Biodiversity Economy Catalogue

Wildlife Green Economic Empowerment and Development Programme



An investment opportunity to empower and protect our natural heritage

Thabakgolo

Game Reserve







Mayibuye

GAME RESERVE

CAMPERDOWN - KWAZULU NATAL

Buhlebemvelo - Neddle dam



THULA

THULA Game Reserve



Balepye Game Reserve



Modemolle Game Reserve



Mabaleng Game Conservancy



Sepelong Game Farm



Sabi Sands Enterprise Development Project



Makuleke Safaris and Game Farm



Double Drift Nature Reserve



WELCOME TO
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DOUBLE DRIFT LODGE 15KM
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SAM KNOTT NATURE RESERVE OFFICE 30KM

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Summary: “the new game changer”

- **Building a robust wildlife** economy that contributes substantially to the financial and economic climate in SA.
- **Promoting sustainable rural enterprises and industries** by enabling emerging wildlife ranchers and community landholders to participate in the mainstream wildlife economy as shareholders and entrepreneurs.
- **Create incentives to attract investment in rural areas** through community private public partnerships without compromising land ownership or use rights.
- Developing game ranches as **new and alternative engines of rural economic development** with strong emphasis on human resource development, job creation and reduction of poverty.
- Building platforms for reduction in the rural **unemployment rate and improve food security, skills development, good governance, social cohesion, wealth and planning.**
- **Calls for a paradigm shift** that places wildlife as viable alternative for a business rural development model and land reform.



Food for thought

- Change is prevalent in every face of our society.
- World does not need your permission to change.
- We however need to change faster than the rate of change.
- Change is complex and sometimes a leap of faith is needed.
- Great leaders and visionaries are required to build a winning nation.
- Change starts within and with YOU.





Thank You



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