Situation analysis: Livestock and fisheries production and consumption in South Africa

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Introduction

- Africa/South Africa perceived to be lowest consumers of animal protein
- Rise in consumption/demand of food of animal origin:
  - Growth of population
  - High degree of urbanization
  - Increasing income of people
  - Changes in consumption and dietary habits
- Reduction in protein-energy malnutrition disorders (kwashiorkor)
May 2009 - new cabinet: DOA’s mandate changed to DAFF.

- Fisheries → DEAT
- Forestry → DWAF

Oceans/sea/dam/lakes: (Aquaculture and fisheries)

Land:
69% suitable for grazing & livestock farming

Length of coastline: 3,751 km

Aquaculture & fisheries
Population of South Africa by population group

<table>
<thead>
<tr>
<th>Year</th>
<th>South African population</th>
<th>African (Blacks)</th>
<th>White</th>
<th>Coloured</th>
<th>Indian/Asian</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>46888</td>
<td>37206</td>
<td>4380</td>
<td>4149</td>
<td>1154</td>
</tr>
<tr>
<td>2006</td>
<td>47391</td>
<td>37663</td>
<td>4365</td>
<td>4199</td>
<td>1164</td>
</tr>
<tr>
<td>2007</td>
<td>47851</td>
<td>38080</td>
<td>4352</td>
<td>4245</td>
<td>1173</td>
</tr>
<tr>
<td>2008</td>
<td>48687</td>
<td>38565</td>
<td>4499</td>
<td>4379</td>
<td>1243</td>
</tr>
<tr>
<td>2009</td>
<td>49321</td>
<td>39136</td>
<td>4472</td>
<td>4433</td>
<td>1279</td>
</tr>
<tr>
<td>2010</td>
<td>49991</td>
<td>39683</td>
<td>4585</td>
<td>4424</td>
<td>1299</td>
</tr>
</tbody>
</table>
Dual agricultural economy

- Well developed Commercial Farming
- Subsistence or Communal Farming

- Emerging rural communal farmers are generally left behind and their voices has minimal influence on the outcome of policy.
- They are generally told what to do and accept it without challenging the reasons for the policy chosen.
Rural economy policy

1) Land reform policy, land redistribution and Restitution of Land Rights Act (1994):
   - Creation and maintenance of an equitable and sustainable land dispensation that results in social and economic development of all South Africans
   - Providing enhanced land rights to all South Africans, particularly, with emphasis on previously disadvantaged individuals
   - Land restitution to provide redress to victims of dispossession of rights in land as a result of racially discriminatory laws that took place after 1913 (apartheid regime)

2) Comprehensive Agricultural Support Programme (CASP), 2004
Objectives

Current aim (pre-requisite to core aim):

- To review the current national situation regarding subsistence farming and policies directed toward them, together with challenges, needs and prospects they face.
- To assess national production and consumption status of fisheries and livestock foodstuffs.
Objectives

Core aim:

- To estimate dietary intake of organic persistent pollutants (POPs) including organochlorine and organophosphate pesticides, and veterinary drugs residues in food of animal origin sold at informal markets.

\[
\text{Dietary exposure assessment} = \text{Food consumption data} \times \text{Concentration of chemical}
\]
Materials and Methods

1) National SWOT and GAP analysis (20 informants from government, academics, industry and farming community)
   - Intensive and extensive livestock farming practices and current government policies
   - Production inputs

2) Extensive literature review along with in-depth interviews with DAFF and DEA officials, farmers and industry organizations
Weaknesses of the policy

1) Lack of data on number of subsistence farmers and their produce
2) Ineffective post land reform settlement

Farmers – No adequate knowledge about animal and financial management
## Strengths of livestock and fisheries sectors

<table>
<thead>
<tr>
<th></th>
<th>Livestock</th>
<th>Fisheries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sector development</td>
<td>Largest national agricultural sector</td>
<td>Fisheries well established.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Aquaculture under developed (infancy stage)</td>
</tr>
<tr>
<td>GDP contribution</td>
<td>2.7-3.1%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Output</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Production</td>
<td>85%</td>
<td>Total production  600 000 t</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Net exported  160 000 t</td>
</tr>
<tr>
<td>Imports</td>
<td>15%</td>
<td>55 000 t</td>
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</table>
Fisheries and Aquaculture

Lack of data on fisheries, marine and freshwater aquaculture
Production and consumption of animal source foodstuffs

<table>
<thead>
<tr>
<th>Year</th>
<th>Beef/veal</th>
<th>Mutton</th>
<th>Pork</th>
<th>Poultry</th>
<th>Beef/veal</th>
<th>Mutton</th>
<th>Pork</th>
<th>Poultry</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005/06</td>
<td>835.0</td>
<td></td>
<td></td>
<td></td>
<td>158.0</td>
<td>196.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006/07</td>
<td>1413.9</td>
<td>168.0</td>
<td></td>
<td>219.0</td>
<td>853.0</td>
<td></td>
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<tr>
<td>2007/08</td>
<td>1661.8</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
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<td>1661.8</td>
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<td>1661.8</td>
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</tr>
</tbody>
</table>
Production and consumption of red and white meat, eggs and milk

- Production white meat
- Consumption white meat
- Production of red meat
- Consumption red meat
- Consumption eggs
- Production eggs
- Consumption dairy products
- Production milk

Years:
- 2005/2006
- 2006/2007
- 2007/2008
- 2008/2009
- 2009/2010

In tons:
- 0
- 500
- 1000
- 1500
- 2000
- 2500
- 3000
Consumption behavior of fisheries and seafoods

Stigma and lowest (10%) poor consumption of fisheries and seafoods by black South Africans:

- Hake (fast-food) and canned tuna & sardines
- Seafoods - phobia
Dependency on cheap imports destroys the chances of farmers’ development.
Opportunities and Threats

Opportunities:
- Re-evaluate developed policy and intervention strategies

Threats
- Limited capacities & lack of technical skill and support
- Limited government support and services
- Food safety and traceability
- High inputs costs (animal feed, fuel, equipment, dips)
- Lack of marketing and access to finance
Threats cont....

- Climatic changes
- Environmental issues and disasters (e.g. floods, fires, pollution)
- Land and water access.
- Competition for animal feeds (e.g. fishmeal – pig/poultry rations vs. fisheries)
- Over-fishing
- Stock theft, poaching and killing of farmers

Thousands of heads of livestock died, many others suffered serious burn-wounds and blindness from fires.
Recommendations and Conclusion

1) Stress the importance of data collection and management and the role they play in:
   - Science-based risk assessment and development of science based policies and regulations,
   - cost-benefits analysis,
   - surveillance and monitoring & other risk management interventions

2) Promote seafood and fish consumption and farming

3) Reduce the dependency on cheap imported foodstuffs
Recommendations and Conclusion cont....

4) Resuscitate land reforms projects by redistributing land and providing farmers with training and services.

5) Prioritize capacity building programmes through retention of skills and transfer of skills from white farmers to black farmers during the transfer of land in order to retain national food production supply and to avoid production losses.
Thank you for your attention
Create a better South Africa, a better Africa and a better World

Department of Agriculture Forestry and Fisheries
Department of Health
Department of Environmental Affairs