

**REPORT ON THE GOAT SECTION 7 COMMITTEE
INVESTIGATION ON THE BOTTLENECKS IMPEDING
GROWTH AND DEVELOPMENT IN THE GOAT INDUSTRY,
AS WELL AS EXPLORING OPPORTUNITIES FOR
SUPPORT IN THE SOUTH AFRICAN GOAT INDUSTRY**



NATIONAL AGRICULTURAL MARKETING COUNCIL (NAMC)

MARCH 2024

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1. INTRODUCTION

1.1. BACKGROUND ON THE GOAT SECTION 7 COMMITTEE

The National Agricultural Marketing Council (NAMC) is a statutory body established in terms of the Marketing of The National Agricultural Marketing Council (NAMC) is a statutory body established in terms of the Marketing of Agricultural Products Act (No. 47) of 1996 to provide advisory services to the Minister of Agriculture, Land Reform and Rural Development and the Directly Affected Groups. On 16 February 2023, the National Agricultural Marketing Council (NAMC), as the custodian of the Marketing of Agricultural Products Act, 1996 (Act No. 47 of 1996) (MAP Act), received a request from the Goat Agribusiness Project (GAP) for the establishment of a Section 7 Committee or Working Group to investigate the bottlenecks impeding growth and development in the goat industry, as well as exploring opportunities for support in the goat industry.

On 28 April 2023, the NAMC's Council held its quarterly meeting and decided to approve the establishment of a Goat Section 7 Committee. Furthermore, the Council decided to appoint Ms. Fezeka Mkile, a Council member, as the Chairperson of the Section 7 Committee in the goat industry. The first meeting of the Goat Section 7 Committee took place on the 21 July 2023.

1.2. THE COMPOSITION OF THE GOAT SECTION 7 COMMITTEE

The goat Section 7 Committee is comprised of the following members:

Ms Fezeka Mkile (Chairperson)	NAMC Council member
Mr Matsobane Mpyana ¹ (Driver)	NAMC Secretariat
Mr Rauri Alcock	Goat Agribusiness Project
Dr Marisia Geraci	Goat Agribusiness Project
Mr Alfred van Wyk	National Emergent Red Meat Producers Organisation
Mr Johan Vossler	South African Federation for Livestock Auctioneers
Mr Joel Mamabolo	Department of Agriculture, Land Reform and Rural Development
Mr Daniel Kekana	Kalahari Kid Corporation
Mr Marco Coetzee	Mohair South Africa
Dr Phillip Oosthuizen	Red Meat Industry Services
Mr Joe De Beer	Statistics South Africa
Dr Daniel Motiang	Agricultural Research Council
Mr Mike Gcabo	Black Agricultural Commodities Federation



¹ Assisted by Mr. Bhekani Zondo, Ms. Naledi Radebe, Mr. Vusimusi Sithole and Mr. Phelelani Sibiya

1.3. TERMS OF REFERENCES

The scope of the Committee was to investigate the following:

- 1.3.1. Quantify the size (value and herd numbers) of goat industry in South Africa;
- 1.3.2. Determine the different role players (farmers, traders, speculators, auctioneers, breeders) in the goat industry;
- 1.3.3. Identify the production regions suitable to produce goats;
- 1.3.4. Assess the impact of live goats' imports from Namibia on the local farmers;
- 1.3.5. Identify and recommend different support (financial and non-financial) from the state to be provided to the goats' industry;
- 1.3.6. Assess and advice on the merits and demerits of establishing an organised goat commodity association, considering the existence of the Red Meat Industry Services;
- 1.3.7. Identify the level of support that could be provided by the Red Meat Industry Services to the goat industry, in particular the indigenous goat farmers that contributes 99% to goat herd; and
- 1.3.8. Assess and advice on the merits and demerits of developing a statutory measure (i.e., registration, records and returns and levies) on the goat industry.



2 LITERATURE REVIEW

2.1. INTRODUCTION

2.1.1. GLOBAL OVERVIEW OF THE GOAT INDUSTRY

According to Food and Agriculture Organization statistics (FAOSTAT, 2023), there are over one billion goats in the world and over 90% are found in developing countries (Utaaker et al., 2021). In developing countries, goats are one of the most important type of livestock. Traditionally, goats provide meat, skin, fibre, and milk. However, over the years goats have also been increasingly used for cultural purposes in traditional ceremonies. Goats are often regarded as inferior compared to other types of livestock; however, in resource-least areas and in poor families' goats serves as the main source and/or secondary source of income (Utaaker et al., 2021).

Despite goats being often regarded as inferior to other types of livestock, they also possess several good traits. For example, the advantage of goat farming relative to cattle is that they have a high productivity rate even under harsh environmental conditions due to their ability to change low quality pastures into high quality protein that can be consumed by humans (Mataveia et al., 2021). Additionally, they have a shorter reproductive cycle, relatively less expensive to feed, and they also have a high prolificacy.

2.1.2. GLOBAL PRODUCTION

Continently, Asia had the highest number of goats it accounted for 51% of total goat stocks, while Africa had the second highest goat stock accounting for a share of 43%, and South America accounts for a share of 2% of total global goat stock. Other continents accounted for the last 4% of goats produced globally (FAOSTAT, 2023).

In Asia, India is the leading goat producer, followed by China and Pakistan each accounting for 26%, 23% and 14% respectively. On the other hand, in Africa, Nigeria is the largest producer of goats, followed by Ethiopia and Chad each accounting for 16%, 10% and 9%, respectively. Brazil is the leading goat producer in South America. Brazil accounts for 50% of total goat stock in South America, followed by Argentina (18%) and Bolivia (10%).

2.1.3. GLOBAL TRADE

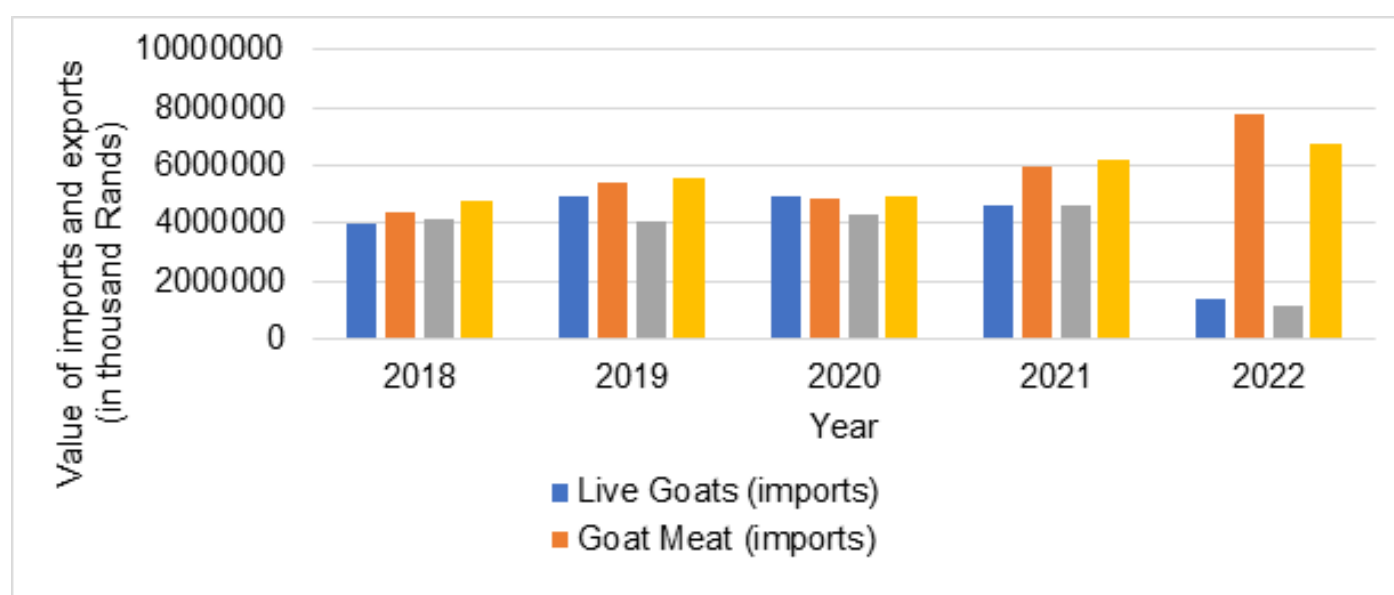


Figure 1: Global imports and exports of live goats and goat meat in value terms

Source: Trade Map (2023)

Figure 1i illustrates the global imports and exports of live goats and goat meat in value terms. Data indicates that since 2018 the goat meat imports and exports were at their highest values in 2022, valued at R7.8 billion and R6.8 billion, respectively. Moreover, the data indicates that global goat meat imports have grown by 77.5% between 2018 and 2022 while goat meat exports have grown by 41% during the same period. However, in 2022 the values of live goat imports and exports were at their lowest since 2018, imports valued at R1.4 billion and exports at R1.1 billion. Data shows that live goat imports decreased by 65% between 2018 and 2022. At the same time, live goat exports have also decreased by 73%.

In 2022, United Arab Emirates (UAE), Lao People's Democratic Republic, and Qatar were the world leading live goat importers each accounting for 25%, 20%, and 9% respectively. The largest live goat exporters were Thailand, Somalia, and Oman each accounting for share in value of 26%, 14% and 13% respectively. United States America (USA), UAE and Republic of Korea were the leading goat meat importers each accounting for 32%, 27% and 7% respectively. Australia was the leading importer of goat meat accounting for 46%, followed by Ethiopia (20%) and Kenya (12%).

2.2. REGIONAL OVERVIEW OF THE GOAT INDUSTRY

2.2.1. THE SOUTHERN AFRICAN DEVELOPMENT COMMUNITY

Africa has the second largest goat population after Asia (FAOSTAT, 2023). The farm animal resources of Southern African Development Community (SADC) are rich and immensely diverse, with goat populations estimated at 38 million goats (SADC, 2023). The SADC region accounted for 1% and 2% of the global and African production respectively. South Africa is the leading goat producer in Southern African, it accounted for 56% of total goat in SADC region, followed by Namibia (20%) and Botswana (13%).

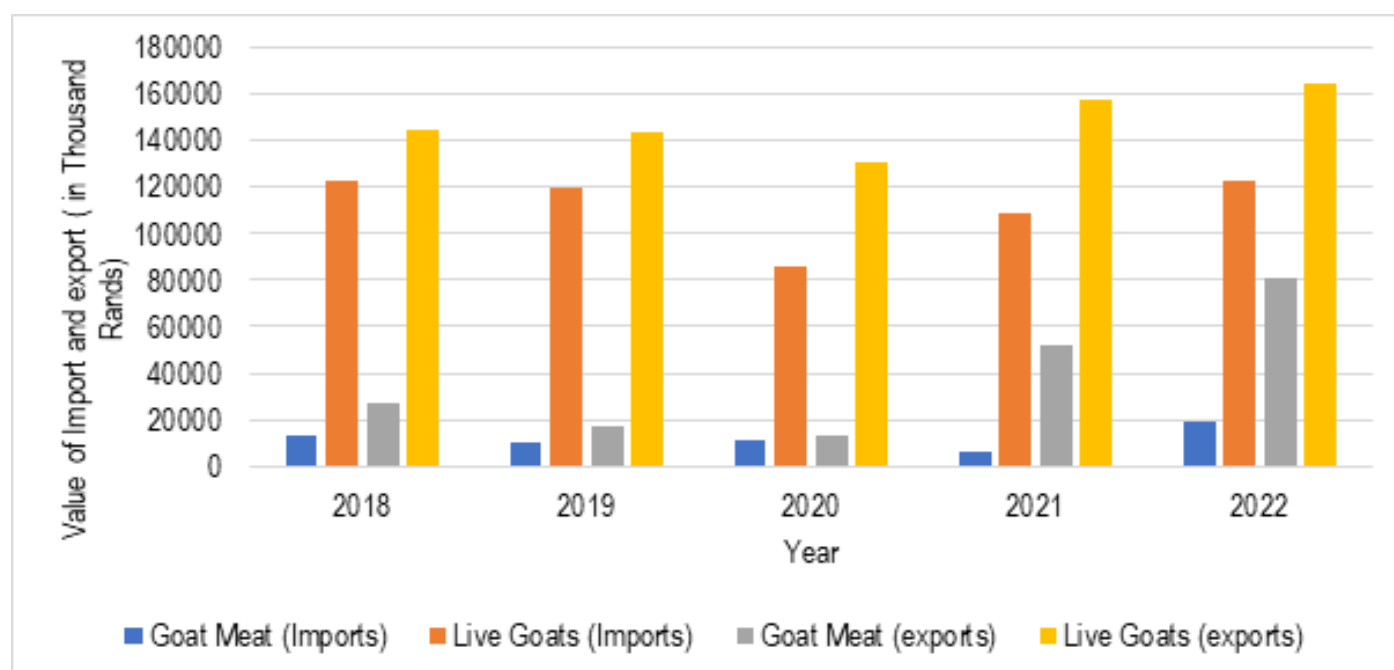


Figure 2: SADC imports and exports of live goats and goat meat in value terms.

Source: Trade Map (2023)

Figure 2 shows the value of live goat and goat meat imports and exports by SADC countries. Data shows that there are more live goat imports and exports, and less goat meat imports and exports in this region. The figure indicates that since 2018 the live goat imports and exports were at their highest values in 2022, valued at R123 million and R164 million respectively. Between 2018 and 2022, there has been a 13% increase in live goat export in SADC region but

growth in live goat imports is less than 1%. In 2022 the values of goat meat imports and exports were at their highest since 2018, imports valued at R18.9 million and exports at R80.7 million. Goat meat imports have increased by 51% and goat meat exports have also increased by 203% during this period.

The SADC region imported 9% of total live goats in 2022. South Africa imported most live goat, with a percentage share of 86% followed by Mauritius (5%) and Zimbabwe (4%). Namibia had the highest export percentage share in the region, it accounted for 70% of the total live goat exports followed by South Africa (15%), and Tanzania (13%). In total the region accounted for 15% of the total live goat exports in the world. Seychelles, Democratic Republic of Congo, and Angola were the leading importers of goat meat, each accounted for 37%, 34%, and 18%, respectively. Tanzania and South Africa were the leading exporters of goat meat. Tanzania accounted for 99% of the total exports in the SADC region, followed by South Africa (1%).

2.2.2. THE SOUTH AFRICAN PERSPECTIVE

2.2.2.1. SOUTH AFRICA GOAT STATUS

The data emanating from various sources shows that there are 7.8 million goats in South Africa of which 7 million are meat goats and 830 000 Mohair goats. A further, 1.8 million of these are in commercial herds and just over 6 million in informal/communal herds.

Table 1: Goat numbers according to various data sources

Total commercial herd (DALRRD)	1 800 000
Informal goats (BFAP/NAMC)	6 030 000
Total goat herd (STATSSA)	7 830 000

Source: Goat master plan/AAMP (2022)

In terms of goat production, South Africa is a relatively small producing country with about 3% of Africa's goats and fewer than 1% of the world's goats (Louw, 2023). In South Africa, there are 250 stud breeders. Goats are produced across the country and about 70% is produced in Eastern Cape, Limpopo, and KwaZulu-Natal. Currently in South Africa the three most crucial commercial breeds for goat meat production are Boer goat, savanna and Kalahari red. Angora goats are used to produce mohair and they are shaved two times annually (South African Online, 2023).

South Africa is the acknowledged cradle of Boer goats throughout the world. Currently, the Boer goat is found in almost every country across the world. The best genetics of Boer goats in the world are developed and breed in South Africa. In 2020, approximately 5.17 million heads of goats were present in South Africa representing a decrease from 5.25 million heads compared to the previous year (Statistica, 2023). Goats can be found all over the country, although the Eastern Cape, Limpopo, and KwaZulu-Natal provinces produce most of the live goats accounting for approximately 70% of the total produced in the country. In South Africa, goats are raised mainly for their meat (also known as chevon), milk, and fibre (including some cashmere and mohair). The Boer goat, Savanna goat, and Kalahari Red goat, which can also produce a tiny amount of cashmere, are the three most significant commercial goat breeds for meat.

Chevon has the same protein content as beef; however, it has between 50-60% low fat which is also lower than chicken fat. According to other studies (NAMC, 2005), conducted in South Africa, Indigenous goats have two coats: a coarse guard hair and cashmere-like fibre. However, the amount of cashmere fibre was often below commercially acceptable

standards. The cashmere production capacity must be seen in the light that, at present, the goats are primarily bred for their meat and milk the cashmere type of down fibre they produce not being utilised at all. For this reason, it is important to find a balance between meat and fibre production.

Saanen, Toggenburg, and British Alpine goat breeds are often referred to as milch goats and they are best known for their milk output. The high quality of goat's milk makes it coveted. Compared to cow milk, goat milk has less lactose and does not include A1 casein, a protein that many people find to be inflammatory. Many people are goat averse because they claim that beef and mutton taste better. Moreover, goat meat is often used for traditional ceremonies and clashes with different people's beliefs. Also, Goat meat is associated with bad smell which makes it unpleasant to many people. Goats needs to be handled correctly from young age until slaughter and market stage to avoid these.

According to popular belief, only animals that are too old are sold, giving goat meat a terrible reputation. There are a few reasons why chevon was not previously promoted, such as: there is not enough information accessible on the indigenous goat industry (What is the true number of indigenous goats and where are these goats, as well as, the markets in which they are traded), another issue is that black farmers view their goats as a source of money or financial stability, therefore they aim to keep them rather than sell them (NAMC, 2005).

2.2.2.2. MARKETS

This Section's goal is to examine the possibilities of various goat products and the marketability of goats on both domestic and foreign markets. When sold in the formal market in South Africa, goat meat will always face competition from the beef, mutton, hog, and poultry industries. Therefore, it is crucial to pinpoint a specific

market for goat meat, and marketing campaigns should focus on the qualities that customers and markets want to see.

Most goats marketed in South Africa are sold by private transactions in the informal market mostly in KwaZulu-Natal. According to estimates, the Black and Indian ethnic communities in KwaZulu-Natal consume 80% of the goats traded there. However, since Indians are participating in the goat trade, they are frequently thought of as the goats' primary consumers. Easter, December, and the winter months see the highest demand on the live goat market. The consumption of goats during festive seasons and ceremonies is thought to be the cause of the seasonal spikes in demand. Goat auctions have lessened in importance in the production areas.

Goat is one of the agricultural commodities which contributes less to the economy and trade of South Africa on records, but in real terms there are lot of goats that are sold every day on informal markets. We find few of chevon products in market shelves because of the association with religion and tradition, therefore very few goats in the country are slaughtered through abattoirs. Lesotho, an independent country within South Africa, is the leading importer of chevon, accounting for 74% of South Africa's export market of chevon in 2016. Moreover, the number of slaughtered goats in South Africa amounted to 719,200 thousand in 2020 (South African Online, 2023) while the number of goats slaughtered informally in Africa amounted to 3.1 million (BFAP/NAMC).

Although families relying on farming for income has been decreasing in the period 2011 to 2016. (Stats Sa agricultural survey 2016). Goat farming has been on the increase. This is specially by small scale farmers in rural areas.

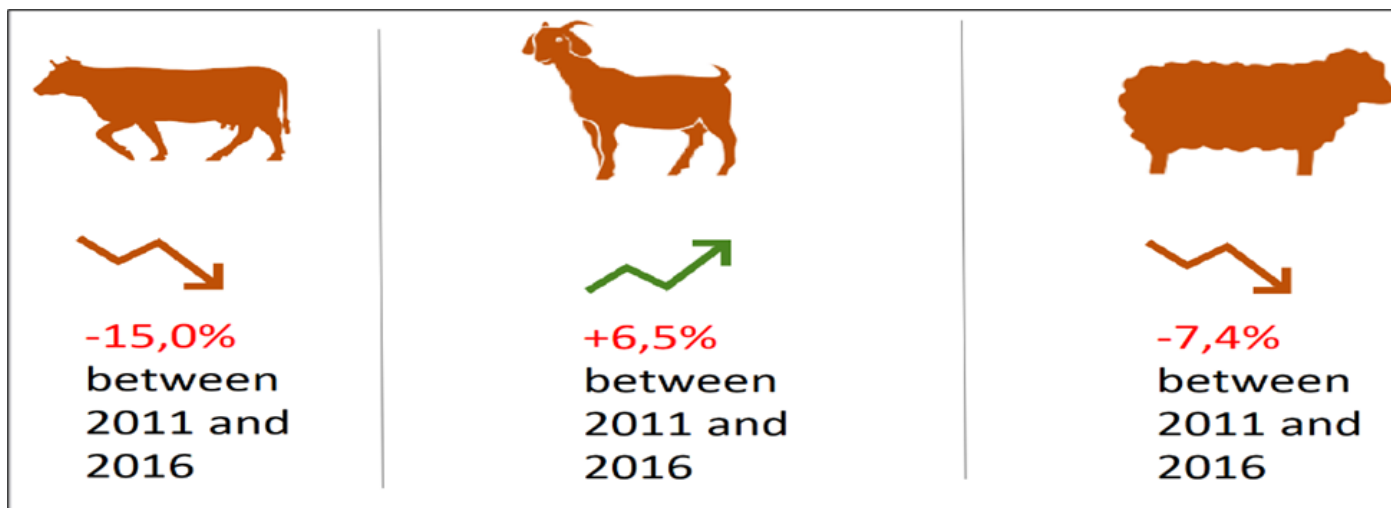


Figure 3: Number of farming household farming livestock types

Source: StatsSA (2016)

Live goat market- Goats can be found all over the country, although the Eastern Cape, Limpopo, and KwaZulu-Natal provinces produce most of the live goats accounting for approximately 70% of the total produced in the country. In South Africa, goats are raised mainly for their sacrificial purposes.

Meat market - (also known as chevon) is underutilized and formal slaughtering for meat through abattoirs accounts for only 0.5 percent of the herd. Many people are goat averse because they claim that beef and mutton taste better. Moreover, goat meat is often used for traditional ceremonies and clashes with different people's beliefs. Also, goat meat is associated with bad smell which makes it unpleasant to many people. Goats needs to be handled correctly from a young age until slaughter and market stage to avoid this.

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indigenous goats and where are these goats, as well as, the markets in which they are traded), another issue is that black farmers view their goats as a source of money or financial stability, therefore they aim to keep them rather than sell them (NAMC, 2005).

Fibre market- There is a large fiber market (including some cashmere and mohair) but as mohair goats are vulnerable to heartwater these goats are limited to the Karoo and the Drakensberg. The Boer goat, Savanna goat, and Kalahari Red goat can also produce a tiny amount of cashmere. According to other studies (NAMC, 2005), conducted in South Africa, indigenous goats have two coats: a coarse guard hair and cashmere-like fibre. However, the amount of cashmere fibre was often below commercially acceptable standards. The cashmere production capacity must be seen in the light that, at present, the goats are primarily bred for their meat and milk the cashmere type of down fibre they produce not being utilised at all. For this reason, it would be important to find a balance between meat and fibre production.

Table 2: Population of goats and their proportionate distribution in Sub Saharan Africa (SSA)

SSA region (Africa)	Total goat population	% of total goat population in SSA	Population of goats for Milk	%Milk goats to the regional total
Eastern	141 945 838	38.08	25 279 669	17.81
Western	165 196 182	44.32	29 318 272	17.75
Central	55 529 942	14.9	4 858 491	8.75
Southern	10 044 078	2.69	110 693	1.10
Total	372 716 040	100	59 567 125	15.98

Source: FAOSTAT

Goat Milk Market - Saanen, Toggenburg, and British Alpine goat breeds are often referred to as milk goats and they are best known for their milk output. The high quality of goat's milk makes it coveted. Compared to cow milk, goat milk has less lactose and does not include A1 casein, a protein that many people find to be inflammatory. The milk goat market is also very limited in South Africa as milk goats are vulnerable to tick borne disease and heat stress. The FAO estimates are that only 1 percent of South Africa's goats are used for milk production, the lowest percentage in Southern Africa. Indigenous breeds in the country or so-called indigenous veld goats are estimated at 77 percent of the national herd.

2.2..2.3. GOAT NUMBERS

2.2.2.3.1. GOAT SLAUGHTER NUMBERS

Table 3 below depicts the number of goats slaughtered per province in South Africa during the year 2021/22. In 2021/22, the Western Cape province recorded the highest share of total goat slaughtered accounting for 50% of total goats slaughtered in South Africa during this period. Limpopo had the second highest slaughter numbers, accounting for 18% followed by Northern Cape which accounted for 16.7%.

Table 3: Total goat slaughter per province during the year 2021/22²

Province(s)	Number of Goats	% Share
Eastern Cape	4	0%
Free State		0%
Gauteng	8	1%
KwaZulu-Natal	1	0%
Limpopo	171	18%
Mpumalanga	8	1%
Northern Cape	158	17%
North West	124	13%
Western Cape	474	50%

Source: RMIS (2023)

²The information that about 948 in one year may be true, for example, in Northern Cape Province there is only one abattoir, privately owned which only slaughtered 158 goats.

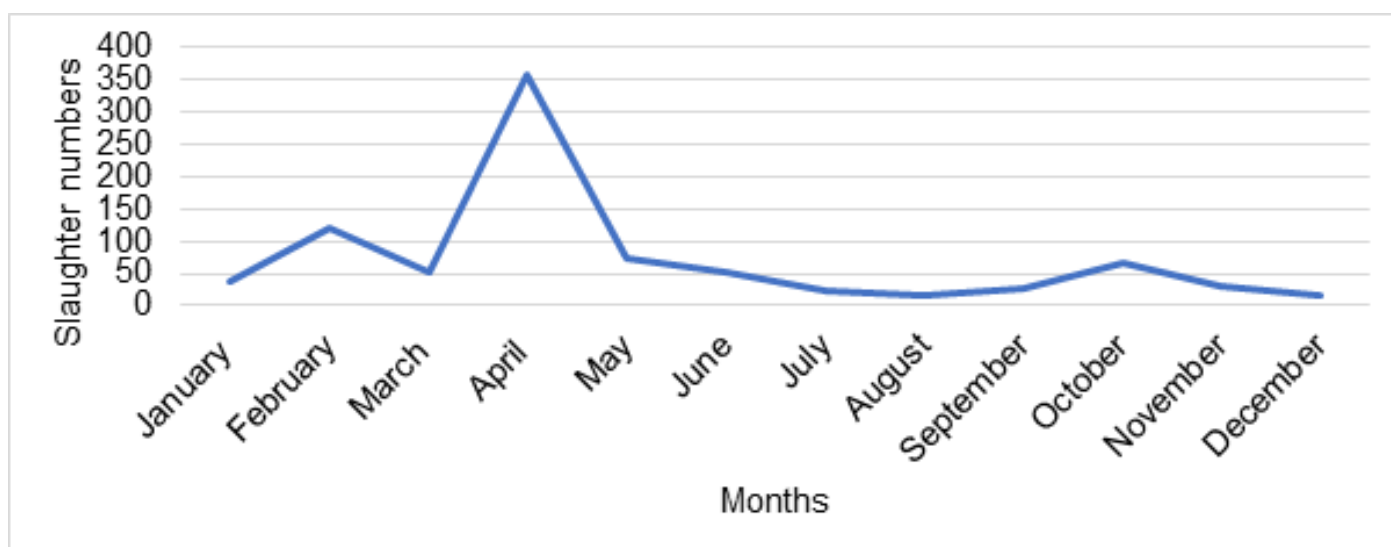


Figure 4: Monthly goat slaughter numbers

Source: RMIS (2023)

Figure 4 illustrates the aggregate monthly number of goats slaughtered. The data show that in 2021/22 season, the total number of goats slaughtered was 871. The data shows that most goats usually get slaughtered around the month of April. In April there were about 359 goats (40%) that were slaughtered in South Africa. On the other hand, February had the second highest number 119 (14%) of goats slaughtered. During May and October, the same number of goats got slaughtered both accounted for 8% share of the total number of goats slaughtered.

2.2.2.3.2. GOAT TOTAL NUMBERS

Table 4 shows that the total number of goats in South Africa for the period August 2020/21 was estimated at over 5 million while the reports indicates that over the total goat population only an estimated 600 000 is slaughtered through formal market system i.e., abattoirs.

Table 4: Goat numbers per Province

Province	Goat ('000)	
	August 2020	August 2021
Western Cape	202	201
Northern Cape	448	448
Free State	215	213
Eastern Cape	1 991	1 990
Kwa Zulu Natal	662	656
Mpumalanga	77	76
Limpopo	902	899
Gauteng	21	19
North west	651	648
Total	5 170	5 150

3. INVESTIGATION INTO THE GOAT INDUSTRY AS PER THE TERMS OF REFERENCES FOR THE GOAT SECTION 7 COMMITTEE

3.1. INVESTIGATION TOOL

On 21 July 2023, the Goat Section 7 Committee held its first meeting and decided that a structured questionnaire be developed and used as a tool to gather data from the key stakeholders in the goat industry. This formed part of the stakeholders consultation and the following stakeholders ³were consulted:

- Limpopo Department of Agriculture;
- Kalahari Kid Corporation in the Northern Cape;
- National Emergent Red Meat Producers Organisation;
- Statistics South Africa;
- Agricultural Research Council;
- National Department of Agriculture, Land Reform and Rural Development;
- Red Meat Industry Services;
- Red Meat Producers Organisation;
- African Farmers Association of South Africa;
- Goat Agribusiness Project; and
- National Agricultural Marketing Council

In addition, the committee also conducted site visits to the goat projects in the Kwa Zulu Natal and Northern Cape province to gather insights and practical experiences/lessons from the ground. The site visits reports are attached as [Annexure B](#) for reference.

3.2. RESULTS AND RECOMMENDATIONS⁴

This Section outlines the results and recommendation obtained from individual interviews of the key industry stakeholders in South Africa. Information was gathered from 11 industry representative respondents from the above-mentioned organizations and these are summarized below:

3.2.1. ACCURACY OF SOUTH AFRICA'S GOAT STATISTICS

In terms of the accuracy of goat statistics that are available in the public domain, most responses from key informants in the goat industry argued that goat numbers in the statistics sources are not accurately estimated. This is underpinned by that the estimated goat numbers primarily estimate or represent the number of goats in the commercial setup, which does not fully account for goats in the emerging/subsistence farming or those that are accounted for in the informal farming sector.

Some also argue that even though these statistics are re-examined annually by the Statistics Directorate of the Department of Agriculture, Land Reform, and Rural Development (DALRRD) they seem to remain unchanged over the years. This is not in-line with most buyers and sellers' reports of the significantly higher quantity of goats available for purchase. However, a few respondents argued that goat statistics are accurately estimated because they represent the responses that the farmers provide. If goat farmers did not report accurately, the results will also be inaccurate. Goat households that raise goats for subsistence farming or "informal" goat farming are not included in the census conducted by Stats SA since it only includes farmers that are registered with the Value Added Tax (VAT).

Lack of properly structured livestock census, lack of animal identification system and inconsistent use of animal records and dip tank information were reported as the potential reasons behind the inaccuracy of statistics of goats. The only reason cattle statistics are available is that the Veterinary Services Department of DALRRD (Vet Department) wanted to track diseases and control stock theft. Also, an extensive system of stock inspectors was employed across the country together with a system of movement permits for cattle, however, this has never been true for goats. This is particularly relevant as most goats are sold live.

³Some of the stakeholders were consulted and did not complete the questionnaire.

⁴Implementation plan is attached as Annexure A

3.2.1.1. ORGANIZATIONS TO APPROACH FOR INFORMATION RELATING TO GOATS

Based on the recommendations by the key informants following organizations, individuals, or institutions can be approached to obtain information about goats. These are: auction houses, livestock traders, livestock transport agents, Department of Agriculture, Land Reform and Rural Development (DALRRD), agricultural research institutions, Indigenous Veld Goat (IVG), Breeders Societies (e.g., Boer Goats, Kalahari Red), Namibia Border Control, South Africa Border Control, Vet Department, Mozambique, and Swaziland border authorities.

3.2.1.1.1. POSSIBLE SOLUTIONS TO ADDRESS CHALLENGES OF THE GOAT NUMBERS IN SOUTH AFRICA

Stats SA already conducts farmer surveys. So, feeding into a national statistics system may help get a high-level estimate of national goat numbers and the geographic spread. A further step of supporting local DALRRD departments and their related Veterinary departments to conduct social surveys in rural and urban areas to understand goat usage and consumption patterns. The state would need to identify a suitable commodity association and establish statutory measures relating to registrations and records and returns dedicated to the goat industry. Understanding the complexity of this invisible market is important to note in the setting up of these links.

An understanding of the goats' industry, its market flows between provinces and usage patterns needs to be understood to provide information to buyers and sellers in all these areas. Moreover, an initial estimate of the anticipated numbers nationwide may be produced by conducting a survey across the country in which each village area is enumerated precisely. This information would then be scaled out across comparable areas within that province. The goat industry's under and/or overrepresentation in certain places would subsequently be verified on the ground. StatsSA might then be

contacted to include industry-recommended inquiries that would better gather specific data on livestock ownership from rural areas.

For the market section, clearer figures from informal and formal imports into the country from our neighbouring countries must also be obtained. Lastly, understanding of the movement of goats between the provinces, mainly towards KwaZulu-Natal (KZN) would also give clearer numbers. A survey done in urban areas of KZN and Eastern Cape (EC) of goats sold in informal markets should be done. A social survey of goat usage should be done at a homestead and ward level for at least KZN and EC which would then also be able to be scaled out to a broader population. Once an idea of these numbers is found, there will be a better understanding of production, consumption and what could possibly be exported in the future.

IMPROVING GOAT PRODUCTIVITY: Value chain participants have differing opinions about potential ways to meet the difficulties of the goat numbers. However, enhancing goat marketing assistance to encourage farmers to increase yield was highly recommended. Tackling the problems associated with South Africa's goat population necessitates a multifaceted strategy that considers a range of variables influencing goat husbandry. Some possible solutions to these challenges include:

IMPROVING GOAT PRODUCTIVITY: Value chain participants have differing opinions about potential ways to meet the difficulties of the goat numbers. However, enhancing goat marketing assistance to encourage farmers to increase yield was highly recommended. Tackling the problems associated with South Africa's goat population necessitates a multifaceted strategy that considers a range of variables influencing goat husbandry. Some possible solutions to these challenges include:

IMPROVED BREEDING PRACTICES: Promoting selective breeding to enhance the genetic quality of goat herds. Also, encouraging the use of improved goat breeds that are more productive and disease resistant.

HEALTHCARE AND DISEASE MANAGEMENT: Investing in veterinary services and disease control programs to reduce goat mortality rates. Educate farmers on proper vaccination and disease prevention measures

INFRASTRUCTURE DEVELOPMENT: Improve infrastructure for goat farming, including adequate shelters, water supply, and fencing. Establish communal grazing areas and promote rotational grazing to prevent overgrazing.

TRAINING AND EDUCATION: Provide training and extension services to goat farmers on best practices in animal husbandry. Educate farmers about the nutritional needs of goats and proper feeding techniques.

MARKET ACCESS AND VALUE CHAIN DEVELOPMENT: Support the establishment of cooperatives or associations to enable small-scale farmers to access markets more effectively. Promote value addition through processing and marketing of goat products like meat, milk, and hides.

FINANCIAL SUPPORT: Offer financial assistance and grants to small-scale farmers for acquiring quality breeding stock and improving infrastructure. Facilitate access to credit and insurance options for goat farmers.

RESEARCH AND INNOVATION: Invest in research to develop technologies and practices that enhance goat production efficiency. Promote the use of sustainable and eco-friendly practices in goat farming.

CLIMATE-RESILIENT FARMING: Develop strategies to mitigate the impact of climate change on goat farming, such as drought-resistant forage crops and water conservation methods.

POLICY AND REGULATION: Review and update policies and regulations related to goat farming to ensure they are supportive and conducive to growth. Address land tenure issues that affect access to grazing areas.

COLLABORATION AND NETWORKING: Encourage collaboration between government agencies, NGOs, research institutions, and farmers to share knowledge and resources. Facilitate networking among goat farmers to promote information exchange and collective problem-solving.

MARKET DIVERSIFICATION: Explore opportunities to export goat products to international markets, thus increasing demand and potentially improving prices for farmers.

PROMOTION AND AWARENESS: Raise awareness about the nutritional benefits of goat products among consumers to boost domestic demand. Highlight the economic and environmental benefits of sustainable goat farming. Addressing the challenges facing goat farming in South Africa requires a coordinated effort from government agencies, agricultural organizations, and farmers themselves. Tailoring solutions to local conditions and involving the community can contribute to the sustainable growth of the goat farming sector.

Moreover, an initial estimate of the anticipated numbers nationwide may be produced by conducting a survey across the country in which each village area is enumerated precisely. This information would then be scaled out across comparable areas within that province. The goat industry's under and/or overrepresentation in certain places would subsequently be verified on the ground. Stats SA might then be contacted to include industry-recommended inquiries that would better gather specific data on livestock ownership from rural areas.

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must also be obtained. Lastly, understanding of the movement of goats between the provinces, mainly towards KwaZulu-Natal (KZN) would also give clearer numbers. A survey done in urban areas of KZN and Eastern Cape (EC) of goats sold in informal markets should be done. A social survey of goat usage should be done at a homestead and ward for at least KZN and EC which would then also be able to be scaled out a broader population, once an idea of these numbers is found, then will be a better understanding of production, consumption and what could possibly be exported in the future.

3.2.1.2. Areas suitable for goat production

According to the key informants, almost every region of South Africa is appropriate for goat farming. This is mainly due to that most goat breeds are low maintenance and can easily adapt to a variety of weather conditions. However, Gauteng seems to be less favourable, given that it lacks the veld resources and fodder necessary to support big goat populations. South Africa has a diverse landscape and climate, which makes it suitable for goat farming in various regions. The suitability of an area for goat production depends on factors like climate, vegetation, water availability, and infrastructure. Here are some regions in South Africa that are generally considered suitable for goat farming:

EASTERN CAPE: This province has a diverse climate with coastal areas, grasslands, and semi-arid regions, making it suitable for various goat breeds. The EC province is known for its commercial and small-scale goat farming operations.

WESTERN CAPE: The Western Cape offers a Mediterranean climate in some areas, which is favourable for goat farming. The province has a mix of commercial and small-scale goat farming enterprises.

NORTHERN CAPE: The arid and semi-arid regions of the Northern Cape are well-suited for hardy goat breeds

that are adapted to drought conditions. These areas often practice extensive grazing. Free State: Parts of the Free State have good grazing lands and a climate that supports goat farming. It is known for its meat production, including goat meat.

KWAZULU-NATAL: The coastal regions and the midlands of KZN offer favourable conditions for goat farming. The province has a mix of commercial and subsistence goat farming.

LIMPOPO: Limpopo has a variety of climatic zones, making it suitable for different goat breeds. It is also known for both meat and milk production from goats.

MPUMALANGA: Parts of Mpumalanga, with its diverse topography, can support goat farming. Farmers in this province often focus on meat production. Gauteng: While Gauteng is highly urbanized, there are peri-urban and rural areas where goat farming is practiced. These areas often cater to local markets.

NORTH-WEST: This province has both arid and high-rainfall areas, making it suitable for various goat farming practices, including commercial and communal farming. Mpumalanga: This province has regions with favourable climates and vegetation for goat farming. It is known for both meat and milk production from goats.

It is important to note that within each province, there can be significant microclimatic variations, so the suitability of specific areas for goat farming may vary. Local factors like soil quality, water availability, and market access also play a crucial role in determining the success of goat farming in a particular area. Prospective goat farmers should conduct a thorough feasibility study and consult with local agricultural authorities to identify the most suitable locations for their specific goals and resources.

3.2.1.3. THE IMPACT OF LIVE GOAT IMPORTS FROM NEIGHBOURING COUNTRIES SUCH AS NAMIBIA ON THE SOUTH AFRICA'S LOCAL GOAT PRODUCERS

The impact of live goat imports from neighbouring countries, such as Namibia, on South Africa's local goat producers can vary depending on several factors, including the volume of imports, the type of goats being imported, and the dynamics of the local market. Some of the key informants have a perception that goat traders might prefer to import goats at lower prices than what local producers expect. Thus, the import of live goats from neighbouring countries will negatively affect the value and market of the South Africa's local goats and its related products. On the other hand, live goat imports may also have a positive impact to local herds through improving breed diversity for South Africa's local goat producers and having competitiveness. This can pose a significant risk to the health of local goat populations, potentially resulting in disease outbreaks and economic losses.

It is also unclear how much of this cross-border trade is legitimately above board, as most border controls involves veterinary inspections and restrictions with record keeping that is passed on to national state departments. State records suggest a drastic decline in cross border goat imports from Namibia from a high of 800 000 goats to the 120 000 currently. State records show that in 2018, 39 goats were imported from Swaziland and from Botswana a single truck load of goats is recorded for the year. Key informants suggest the situation is very different on the ground. No definitive information is available of smuggling or other illegal imports.

Table 5: Number of Marketed goats

TABLE 3.3.1: NUMBERS MARKETED

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total marketed	1,162,912	1,374,385	1,513,276	1,512,711	1,230,567	1,344,388	1,334,780	1,374,687	1,113,364	1,250,602
RSA - Live	755,363	965,713	1,149,149	1,123,102	756,464	544,643	535,121	457,897	300,536	307,552
Meatco Factories (Export abattoirs)	192,795	254,966	318,713	366,454	435,676	772,422	725,558	856,438	762,647	865,758
Local Butchers	214,754	153,706	45,414	23,155	38,427	27,323	74,101	60,352	50,181	77,292
Market share (%)										
RSA - Live	65.0	70.3	75.9	74.2	61.5	40.5	40.1	33.3	27.0	24.6
Meatco Factories	16.6	18.6	21.1	24.2	35.4	57.5	54.4	62.3	68.5	69.2
Local Butchers	18.5	11.2	3.0	1.5	3.1	2.0	5.6	4.4	4.5	6.2

Source: Meat Board of Namibia, 2010

Nambian imports of live goats decreased from 755 000 in 2000 to 307 000 by 2009

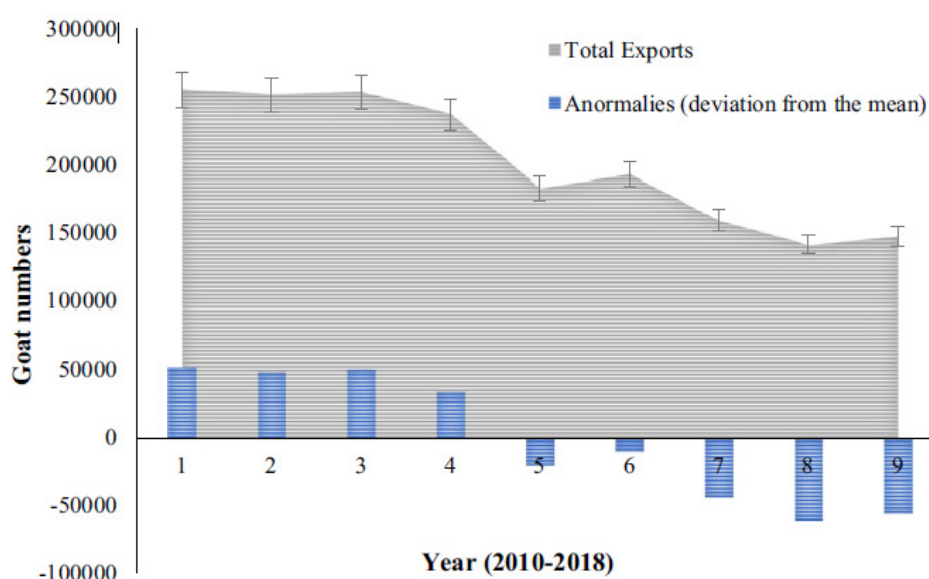


Figure 5: Namibian goat imports

Source: Namibian Meat Board

According to the key informants, the Namibian imports seem to be diminishing which is not a problem for the average goat farmer, but they do set the market price for the country. This has been described as a price bubble that would create a falsely high market price if allowed to continue once indigenous goats are brought into the market fully. The other negative impact mentioned is that other traders import from the neighbouring countries informally. This allows them to compete unfairly but also has a potential to allow zoonotic diseases into the country.

The biggest of these risks is that of Peste des petits ruminants (PPR) an acute, highly contagious, World Organization for Animal Health (OIE) notifiable and economically important transboundary viral disease of sheep and goats associated with high morbidity and mortality and caused by PPR virus. To date, South Africa is a PPR free country. It has been reported in neighbouring Mozambique. As here are a deficit of goats in South Africa, and we import from our neighbouring countries both legally and illegally goats carrying PPR pose a significant risk to our national goat herds. The National State Vets are aware of the danger and at a national level have voiced concern about its inevitable arrival in the country. There is no supply currently of PPR vaccine. Onderstepoort Biological Products (OBP) the only organisation who could stock and register the vaccine has made no mention of planning to do so. With up to an 80% mortality rate, it will be devastating and will be very difficult to control in unregulated African goat herds. If an initiative could be put forward controls on the borders to create layers of biosecurity around the movement of goats that may help slow down the arrival and spread of PPR in the South.

Therefore, the potential impacts can be summarised as follows: Competition and Price Pressure, disease risk, as well as genetic improvement impact.

To mitigate potential negative impacts and ensure the sustainability of the local goat farming industry, policymakers and stakeholders may consider implementing import regulations that ensure imported goats meet health and quality standards. Supporting local goat producers through training, access to veterinary services, and improved breeding practices. Promoting value addition and marketing strategies to enhance the competitiveness of locally produced goat products.

Monitoring and managing disease risks associated with imports through quarantine and biosecurity measures. Lastly, collaborating with neighbouring countries to establish fair trade agreements that benefit both local and regional producers. Ultimately, a balanced approach is necessary to manage the impact of live goat imports on South Africa's local goat producers while also fostering regional cooperation and trade.

3.2.1.4. SUPPORT MEASURES AND INTERVENTIONS REQUIRED FOR THE GROWTH AND DEVELOPMENT OF THE SOUTH AFRICAN GOAT INDUSTRY

For the South African goat industry to grow, focus should be on building strong producer clubs or cooperatives to improve coordination and increase economies of scale. Improvement in the coordination of live goat market systems, development, and support new entrant goat traders is recommended. Support development of unemployed graduates as goat/ livestock management service providers to ensure primary animal health and appropriate husbandry practices in conjunction with farmer cooperatives. The creation of formal slaughtering and marketing facilities, and creation of market access for goats i.e., fattening and abattoir is also essential. Support to develop the whole value chain for emerging sector- infrastructure and market system and strengthen producer capacity: production and breeding systems.

The Department Agriculture needs to create an extension policy around goats which includes disease and tick control support specific to goats as well as support on productivity increases based on feed and management. There should also be a support with training and more goat market availability or creation. Some farmers will need support with finance or production schemes. There is a need for national goat policy around imports/exports, marketing, sales in urban areas. Research on improving production and reducing mortalities needs to be done by research institutions as well as educational institutions. Promote goat meat consumption in communities and formal market structure, explore goat meat exports through registered abattoirs. Promotion and Awareness through launch marketing campaigns to raise awareness about the nutritional benefits of goat products among consumers.

3.2.1.5. PERCEPTIONS ABOUT THE ESTABLISHMENT OF A NATIONAL GOAT SUPPORT AND OVERSIGHT GROUP/ORGANISATION THAT CAN SOLVE THE CHALLENGES FACING THE GOAT INDUSTRY IN SOUTH AFRICA.

All key informants expressed that establishment of a national goat support and oversight group could be a solution to the challenges facing the goat industry in South Africa. There are existing organizations who could perform these functions such as the Goat Agribusiness Project with the support of other industry players such as Goat SA, ARC, RMIS and NAMC and other members that made up this committee. Having this oversight group can be a benefit because having a dedicated organization can evaluate a relevant and implementable structure to formalize the industry. Such an organization can play a crucial role in promoting the growth, development, and sustainability of the industry for several reasons. These may include amongst other;

COORDINATION AND COLLABORATION: A national organization can serve as a centralised platform for coordinating efforts and fostering collaboration among

various stakeholders, including government agencies, research institutions, non-governmental organizations, and farmers. This coordination can help ensure that resources, expertise, and initiatives are effectively pooled and deployed to address industry challenges.

DATA COLLECTION AND RESEARCH: The organization can facilitate data collection, research, and information dissemination related to the goat industry. This can include collecting and analysing data on goat populations, market trends, and emerging challenges. Research findings can inform evidence-based policies and interventions.

POLICY ADVOCACY: A national organization can advocate for favourable policies and regulations that support the goat industry. This includes advocating for policies related to trade, healthcare, infrastructure development, and access to financial resources.

EDUCATION AND TRAINING: The organization can provide education and training programs for goat farmers, helping them acquire knowledge and skills in modern farming practices, health management, and sustainable production techniques.

MARKET ACCESS AND VALUE ADDITION: It can facilitate market access by creating linkages between producers and buyers. Additionally, it can promote value addition by supporting processing and marketing initiatives, thus increasing the income potential for goat farmers.

DISEASE CONTROL AND BIOSECURITY: The organization can play a key role in disease control and biosecurity measures, helping to reduce the risk of disease outbreaks and protect the health of goat herds.

SUSTAINABLE FARMING PRACTICES: Promoting sustainable and environmentally friendly farming practices can be a focus of the organization, helping to address concerns related to land degradation and overgrazing.

RESOURCE ALLOCATION AND GRANTS: It can help allocate resources, grants, and financial support to deserving goat farmers, particularly small-scale and emerging producers. This can enhance their capacity to invest in infrastructure and breeding programmes.

MONITORING AND EVALUATION: The organization can establish mechanisms for monitoring and evaluating the impact of its initiatives, ensuring that interventions are effective and adapting strategies as needed.

MARKET RESEARCH AND CONSUMER AWARENESS: Conducting market research can help identify consumer preferences and trends, enabling farmers to align their production with market demands. Additionally, the organization can raise consumer awareness about the nutritional benefits of goat products. While the establishment of a national goat support and oversight organization holds significant potential, its success would depend on careful planning, effective governance, and the active involvement and support of stakeholders. Collaboration, transparency, and a clear mission to address the challenges facing the goat industry in South Africa would be essential for the organization to fulfil its mandate and contribute to the industry's growth and sustainability.

3.2.1.6. KNOWLEDGE ABOUT RED MEAT INDUSTRY SERVICES (RMIS)

All key informants reveal that they know the RMIS. This was part of the questionnaire and thus reflected in this report.

3.2.1.6.1. THE LEVEL OF SUPPORT THAT RMIS CAN PLAY IN THE GOAT INDUSTRY, ESPECIALLY TO THE RURAL GOAT PRODUCERS FARMING WITH INDIGENOUS GOATS IN SOUTH AFRICA

The Red Meat Industry of South Africa (RMIS) and other industry players can play a significant role in working with and co-ordinating support the goat industry, especially rural goat producers farming with indigenous goats. RMIS, Goat SA, ARC and GAP can advocate for formalisation of entire goat's value chain. While RMIS primarily focuses on the red meat industry, including beef and lamb, its expertise, infrastructure, and administrative capabilities can be leveraged to benefit goat producers as well, particularly in the following ways:

LEVY COLLECTION AND ALLOCATION: RMIS can collect levies from goat producers, like how it does for red meat producers. These levies can be allocated to fund industry development programmes, research, and marketing initiatives specific to goat farming.

DATA COLLECTION AND RECORDS: RMIS can establish a system for data collection and record-keeping for the goat industry. This can help in tracking goat populations, production statistics, and market trends, which are essential for informed decision-making.

MARKET ACCESS AND VALUE CHAIN DEVELOPMENT: RMIS can facilitate linkages between goat producers and buyers, processors, and retailers. This can help create market access opportunities for rural goat farmers.

EDUCATION AND TRAINING: RMIS can also offer educational and training programmes that focus on goat farming best practices, health management, and sustainable production techniques. These programmes can be targeted at rural goat producers to enhance their knowledge and skills.

DISEASE CONTROL AND BIOSECURITY: RMIS can collaborate with veterinary services to implement disease control and biosecurity measures for goat herds, which is crucial for the health and productivity of indigenous goat breeds.

POLICY ADVOCACY: RMIS can advocate for favourable policies and regulations that support the goat industry, including indigenous goat farming. This can involve working with government agencies to address regulatory challenges specific to goats.

RESOURCE ALLOCATION: RMIS can allocate resources and grants to deserving goat farmers, particularly those in rural areas, to invest in infrastructure and breeding programs.

MARKET RESEARCH AND CONSUMER AWARENESS: Conducting market research and consumer awareness campaigns can help identify market trends and raise consumer interest in goat products. RMIS can leverage its existing networks and resources to carry out such initiatives.

MONITORING AND EVALUATION: The organization can establish mechanisms for monitoring and evaluating the impact of its initiatives in the goat industry, ensuring that interventions are effective and align with the needs of rural goat producers. While RMIS can offer valuable support to the goat industry, it is important to recognize that goat farming has unique characteristics and challenges compared to other livestock sectors. Therefore, RMIS would need to adapt its strategies and programmes to specifically address the needs of rural goat producers and the sustainability of indigenous goat breeds. Collaboration with existing goat-related organizations and experts in the field would also be essential to ensure that the support provided is tailored to the specific requirements of goat farmers in South Africa.



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ANNEXURES

ANNEXURE A: GOAT SECTION 7 COMMITTEE IMPLEMENTATION PLAN

The purpose of this section is to outline the execution of the recommendations emanated from the goat industry investigation by the role players involved in the goat industry in South(ern) Africa. The goat investigation forms part of the goat interventions as outlined in the Agriculture and Agro-Processing Master Plan (AAMP).

This implementation plan outlines a comprehensive strategy for addressing the challenges identified in the goat industry and leveraging opportunities for growth and development based on the recommendations from the investigation on the Goat Section 7 Committee report. Collaboration among government agencies, research institutions, and stakeholders plays a critical role for the successful implementation of the committee's recommendations. Regular monitoring and evaluation are of equal importance to ensure that interventions are effective and responsive to the needs of goat farmers and the industry as a whole. Moreover, enhancing regulatory frameworks, promoting local markets, and ensuring inclusivity in the goat industry. Implementation requires collaboration between government agencies, stakeholders, and communities to address regulatory challenges, strengthen market infrastructure, and promote inclusive participation in the goat value chain as enshrined in the AAMP.

Table 1: Implementation Plan for aligned to the Recommendations of the Goat Section 7 Committee Investigation

Recommendations		Responsibility	Monitoring
Category	Description		
Genetics and bio-security	<ul style="list-style-type: none"> Collaborate with the Veterinary Department and Breeders Societies to launch awareness campaigns on selective breeding practices; and Fast-track a process of importing, stockpiling and registering the PPR vaccine 	ARC, OBP, breeding societies, DALRRD-animal health	National Agricultural Marketing Council
Farmer support	<ul style="list-style-type: none"> State extension system to be reviewed to accommodate small scale farmers in rural areas. Goat productivity and commercialisation to be added as a subject. State support for goat specific dip tanks and commitment to long term support of these through current dip tank support system with dip chemicals and oversight. <p>Training: Establish practical training workshops and seminars on the following:</p> <ul style="list-style-type: none"> Improved breeding techniques and the selection of productive and disease-resistant breeds. Expansion and rolling out of services such as veterinary, nutrition and vaccinations in rural and remote areas <p>Financial</p> <ul style="list-style-type: none"> Allocate grants and subsidies through government and industry to assist goat farmers in the acquisition of quality breeding stock and infrastructure. Collaborate with financial institutions to provide interest free credit and insurance options tailored to the needs of goat farmers. <p>Research and innovation</p> <ul style="list-style-type: none"> Allocate funding to agricultural research institutions to conduct research on technologies and practices for enhancing goat production efficiency. Support innovation in sustainable and eco-friendly farming practices. Furthermore, invest in research strategies that respond to climate smart agriculture practices. Feed systems research and supply to goat farmers. 	<p>DALRRD – Provincial departments of Agriculture and private sector i.e. RMIS, NGO's such as GAP and</p> <p>Provincial State-owned Entities such as ADA, ECDC</p>	

Animal statistics	<p>Traceability: A national traceability system may be a solution to national goat numbers, thereby conducting nationwide surveys/ census accurately estimate goat numbers, market flows and the geographic spread.</p> <ul style="list-style-type: none"> ● Conduct social surveys in rural and urban areas to understand goat usage and consumption patterns. ● Continuation of the Small Stock Recording Scheme. ● Identify a suitable commodity association and establish statutory measures relating to registrations and records and returns dedicated to the goat industry. 	<p>Collaboration between STATS SA & DALRRD Agricultural Statistics, supported by RMIS, Industry and NAMC</p> <p>ARC & Goats SA</p>	
Boarder Management Controls	<ul style="list-style-type: none"> ● Strengthen border management controls and regulate the movement of goats from one country to the next i.e., Lesotho, Botswana, Namibia etc. furthermore, collaborate with neighbouring countries to enforce strict compliance with import and export regulations. ● Establish a subcommittee to review and evaluate current rules and veterinary compliance and set up common rules for all goat imports with all countries plan (PPR identification and isolation plans), and ● Impose strict stock theft measures i.e., tattooing 	Boarder Management Authority, DIRCO & DALRRD	
Market access and infrastructure	<ul style="list-style-type: none"> ● Establish formal rural markets for sale of live goats such as those in KZN. ● Update the current municipal by laws restricting sales of live animals in towns ● DALRRD to partner with institutions such as the Indigenous Veld Goat organisation, GAP & ARC to establish fencing, dipping tanks, handling facilities, grazing camps and other to establish enabling environment for goat farming in rural areas. 	DALRRD – Provincial departments, GAP & ARC	
Production Scheme	<ul style="list-style-type: none"> ● Establish a production scheme on goats for inclusivity of women, youth and people with disability. ● Pilot meat abattoirs etc slaughtered animal value chains ● Veterinary access through local shops and para vets 	Lead coordinator: NAMC, GAP, ARC, CSIR Supported by industry role players	
Promotions and awareness	<ul style="list-style-type: none"> ● Local promotions and awareness of the importance and benefits of the goat industry and nutritional quality of its products. 	Both public and private sector, articles about the industry	

ANNEXURE B: SITE VISITS REPORT AS PART OF THE GOAT SECTION 7 COMMITTEE INVESTIGATION

REPORT TO THE MEMBERS OF THE GOAT SECTION 7 COMMITTEE ON THE SITE VISITS CONDUCTED IN KWA ZULU NATAL AND NORTHERN CAPE PROVINCE.

On 8 February and 8 March 2024, the site visits were conducted in the Kwa Zulu Natal and Northern Cape Province respectively, as part of the finalisation of the Goat Section 7 Committee investigation. The observations, experiences and lessons learnt from the visits emanated from engagements with farmers, traders, government officials, communities and abattoirs will inform and strengthen the recommendations to be implemented and assist in the allocation of role and responsibilities of the value chain players in the goat industry. The report presents the highlights of the projects and slaughter facilities visited in the Kwa Zulu Natal and Northern Cape Province.

In KZN, the team consists of the NAMC and Goat Agribusiness Project visited smallholder goat producers in the rural village of Ngcutshaneni uMsinga local municipality. The farmers that were visited comprises of 40 families that live in a land reform farm (900 ha) and they mainly produce goats ranging from about 15-300 goats per household. In addition, these farmers also keep cattle and grow vegetables. However, due to drought, more families have been moving away from cattle keeping to small stocks (goats and sheep). The visits were facilitated by the Goat Agribusiness Project

(GAP) and HPSA (formerly Heifer International South Africa) that is a community development organisation that partners with impoverished rural communities to end hunger and poverty in South Africa and care for the earth. The fundamental objectives of GAP are to create small businesses among local youth to support farmers through a Community Animal Health Worker (CAHW) program, facilitate commercialisation of local goat herds, improve production in local homestead herds, create and strengthen value chains around goats, support and target academic research on issues experienced by farmers, and support basic animal health of chickens and cattle in rural areas.

In addition, the project is working with over 20 000 farmers in five districts in KZN. These are Mzinyathi, Thukela, King Cetshwayo, Zululand, and uMkhanyakude. GAP plays a very important role in providing extension support to the farmers in KZN. The research team also had an opportunity to visit a goat mini sales market where over 60 goats were sold within a space of a few hours. This is one of the initiatives facilitated by GAP and HPSA to ensure that smallholder farmers striving towards goat commercialization. This is a very crucial step towards resolving some of the social challenges within the country such as poverty, household food insecurity, youth unemployment, among others.

The highlights of the KZN visits





On 8 March 2024, the NAMC and Kalahari Kid Corporation (KKC) funded through the NC DARD representatives visited Kalahari Kid Cooperation project in the Northern Cape province which farms about 600 goats. The KKC is a joint initiative between private sector, the Northern Cape Provincial Government, and emerging farmers in the Northern and Eastern Cape, and the North West Province of South Africa. The initiative facilitates the upliftment of communities and poverty alleviation through job creation. Kalahari Kid has contract growers (farmers who farm with goats, solely for re-sale to the Kalahari Kid Corporation). Extension officers are constantly monitoring the quality of animals. This is necessary to do proper planning to market the product. The Corporation also sources the goats for slaughter, consolidates them in groups and sends them to KYTO abattoir situated in Groblershoop. Kalahari Kid Corporation is also marketing goat meat and value-added products to both local and international markets.

The KKC is a 4600ha farm under lease agreement with the Northern Cape Department of Agriculture and Rural Development. It is an open space farm, with several goat camps, with no house and electricity infrastructure but

only a container that stores all the farming equipment and goat supplements, feeding troughs, water tank with pipes to supply water for the goats. There is a total of 600 herd of boer goats (buck and doe) on the farm, separated according to their age, breeding stage, and their readiness for market. There are 7 employees on the farm, working part time.

“There was an observation that at times producers import goats from the nearby countries at a lower price and while they are still at a young age. The interesting part is that the farmer mentioned that after they imported the goats from a certain country, at the boarder all the rules and policy procedures are followed but after the goats reach the farm the South Africa veterinary services do not do any follow up according to the policy on the imported goats, hence it is easy for them to breed and grow the goats at the farm”⁵.

The farmer buys supplements like lick, lucerne, and pellets for the goats. The farmer is a member of the boer goat association which assist farmers with market information, production programme, and disease awareness or prevention programmes.

⁵This shows the importance of strict regulation for compliance to biosecurity measures

On the same day the team visited KYTO abattoir, which is leading in supply of Organic, Free range and Halaal lamb meat in South Africa. KYTO is a privately owned entity that was established in 1993, at the same times as the Kalahari Kid project. It started as a small operation slaughtering 100 sheep a day. The abattoir has expanded, it is now divided into two parts, the first part is slaughtering process and processing, currently they slaughter 1600 animals per day. The main reason for the abattoir to be located at Groblershoop was to be closer to the raw product, because goats are mostly produced in this area. The aim was to prevent animals being transported over a long distance and to keep the quality of the meat good helping farmers in the process. Other reason was the availability of resources such as water, manpower, etc.

The abattoir is essential to the surrounding communities because it offer services to all types of farmers from small-scale/ emerging farmers to commercial farmers. The abattoir also sources animals from Namibia, the whole of Northern Cape and Free State. KYTO is registered as an export facility, the abattoir exports both sheep and goat meat. China is one of the main importers of their product, they started by exporting 12 units a day, and at the day of the visit 100 unit of goat meat was exported to this market, the aim is to grow to 400 units a day. Lamb is mainly exported to Middle East. 90% of their products goes to Gauteng, they supply their products mostly to Checkers, Woolworths, and various small shops. Moreover, the KYTO also exports goats and sheep skin to the Middle East countries.

MARKET

The farmer exports goats to different countries like Zimbabwe, Botswana, and Qatar but they have not been able to export to countries like Namibia due to boarder rules with goat diseases. Lately for some years, the exportation of goats to any country because of the challenges like diseases which at times resulted to less production of goats and not being able to produce consistently to sustain the export market. The other market is the abattoir, where live goats are slaughtered and sell their meat through informal market. KZN also buy goats in bulk from the Northern Cape Province at a cheaper price (R1200 per goat) and resale in their province at a higher price.

Some images taken during the visit in the Northern Cape Province





CHALLENGES

The challenges encountered includes drought, theft, water, and diseases. Furthermore, maintaining the market in terms of consistent supply.

CONCLUSION

The farmer raised a recommendation that for the goat industry to grow both in production and be valued as an important commodity in the market, the government should do more research on goats' market working with the existing goat associations.