

Agri Benchmark

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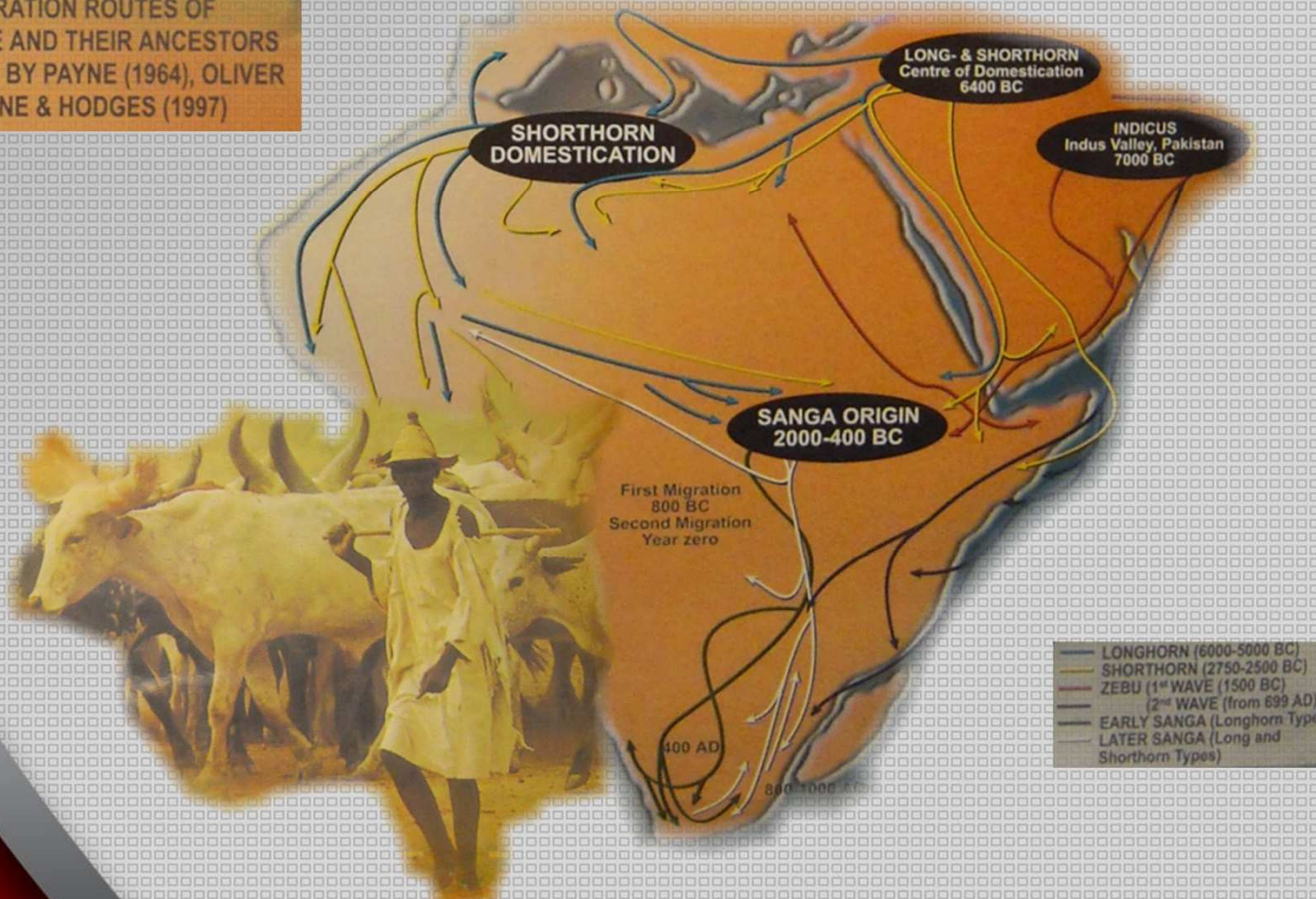
Introduction

Estimated livestock numbers in the Republic of South Africa

Province	Cattle	Sheep	Goats
	x1000		
Northern Cape	493	7 890	513
Western Cape	501	2 891	253
Free State	2 320	6 013	256
Eastern Cape	3 197	8 625	3 201
KwaZulu-Natal	2 805	858	952
Mpumalanga	1 375	1 663	106
Limpopo	1 181	196	1 087
Gauteng	276	82	8
North West	1 816	734	771
Total	13 964	28 952	6 980

Opportunities – *Livestock Genetic Resources*

POSSIBLE MIGRATION ROUTES OF SANGA CATTLE AND THEIR ANCESTORS AS DESCRIBED BY PAYNE (1964), OLIVER (1983) AND PAYNE & HODGES (1997)



Frequency of genes associated with meat tenderness

Breed	Percentage animals with 0, 1 of 2 copies of the gene			Frequency of gene for meat tenderness
	0 (%)	* (%)	** (%)	
Afrikaner	0	7	93	96%
Bonsmara	1	6	93	96%
Drakensberger	0	36	64	82%
Nguni	2	28	70	84%
Tuli	17	22	61	72%
Brahman	18	50	32	57%
Angus	1	21	78	89%
	2	28	70	84%

SA Cattle Breeds



Bonsmara



Simbra



Angus



Beefmaster



Brangus



Senepol

SA Sheep Breeds



Afrino



Merino



Mutton Merino



Merino Landskaap



Black Headed Dorper



Karakul



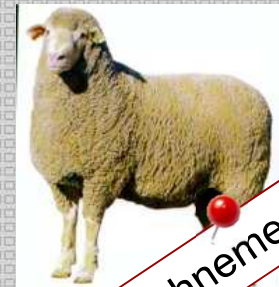
White Dorper



Meatmaster



Dormer



Dohnemerino



Pedi



Van Rooy

SA Goat Breeds



Angora



Savanna

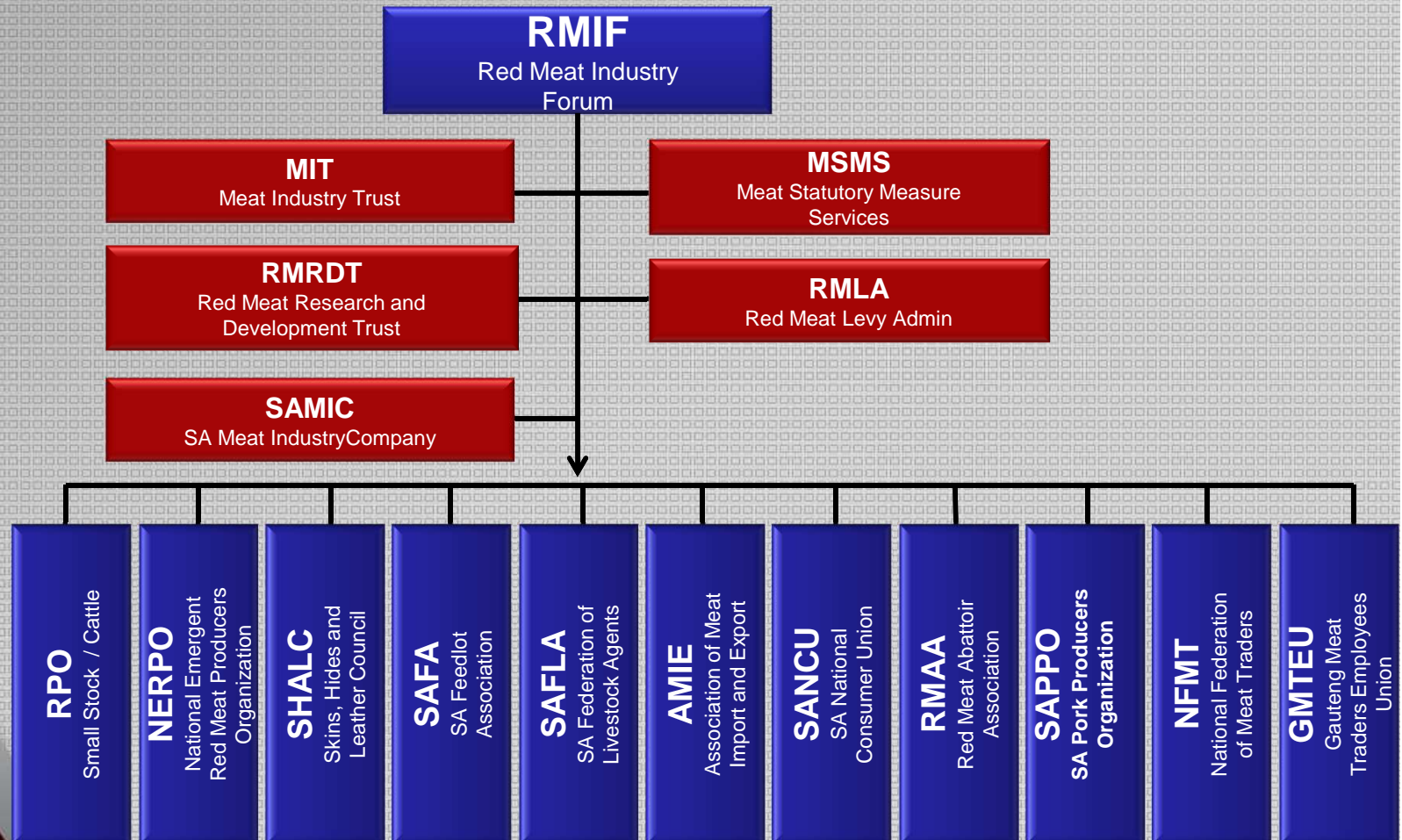


Boer Goat



Kalahari Red

Opportunities - Industry Structure



± 70 000 Commercial and Emergent Red Meat Producers



Industry Structure - RPO

- Magazine – new format



- Monthly Newsletter

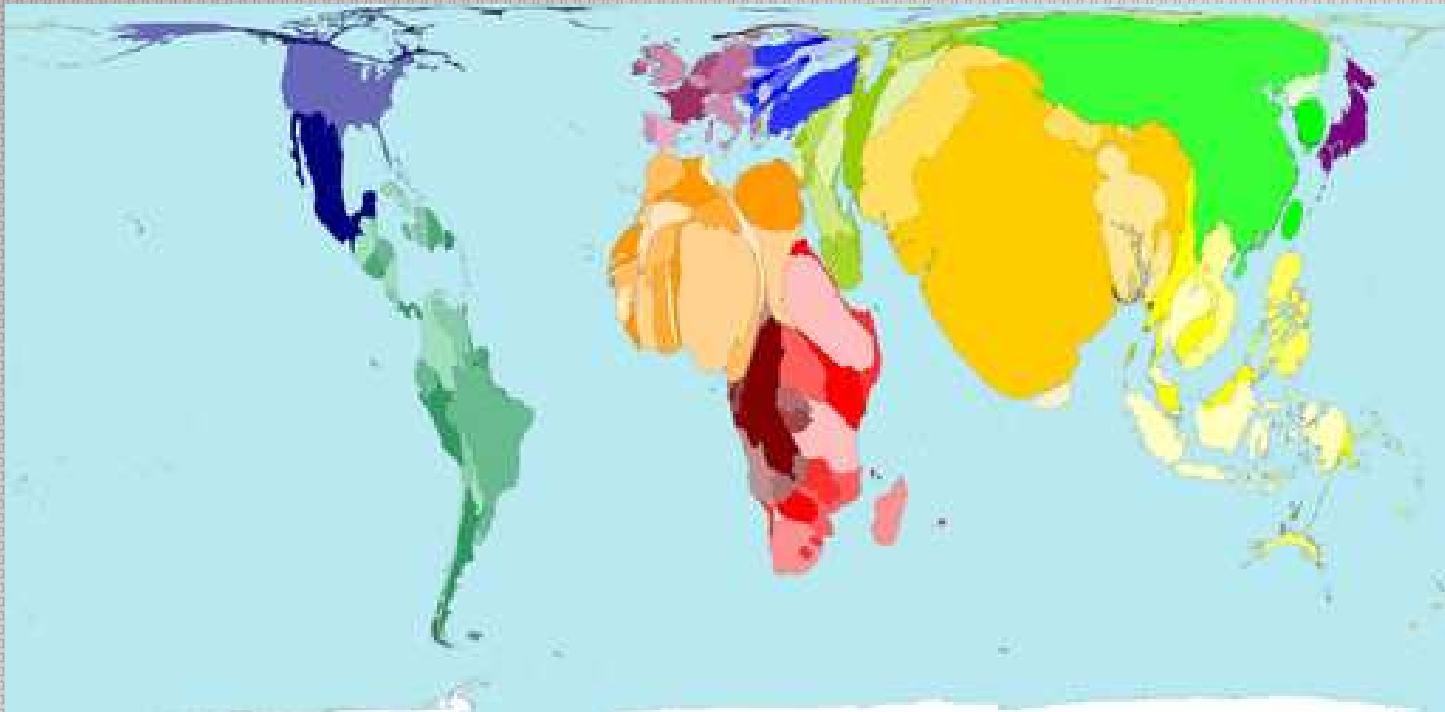


- Web – www.rpo.co.za

Opportunities - Statutory Levy

Function	Service Provider	R/Annum
Consumer satisfaction	AMIE, 'Compliance Committee', SAMIC, LWCC	2,966,118
Consumer Education	RPO/NERPO, SAVV, SHALC	4,054,132
Transformation	RPO/NERPO, NERPO, NFMT, SAVV, SAMIC, SHALC, SAFLA	4,511,164
Research	RMRD-SA	3,000,000
Liaison	AMIE, RPO/NERPO, NFMT, SHALC, SAFLA, RMIF	2,516,559
Production Development	RPO/NERPO	4,016,684
Total RPO voluntary funding		21,064,658 6 000 000

Opportunities - *African Market (Births)*



- More children are born each year in Africa than are born in the Americas, all of Europe and Japan put together.

Opportunities – *Financial Institutions*



Challenges – Stock theft

1 April 2010 – 31 March 2011

» **Cattle**

> Stolen	60600	R 454 500 000
> Recovered	26 458	R 198 435 000
> Loss	34 142	R 256 065 000

» **Sheep**

> Stolen	90017	R 108 020 400
> Recovered	18541	R 22 249 200
> Loss	71476	R 85 771 200

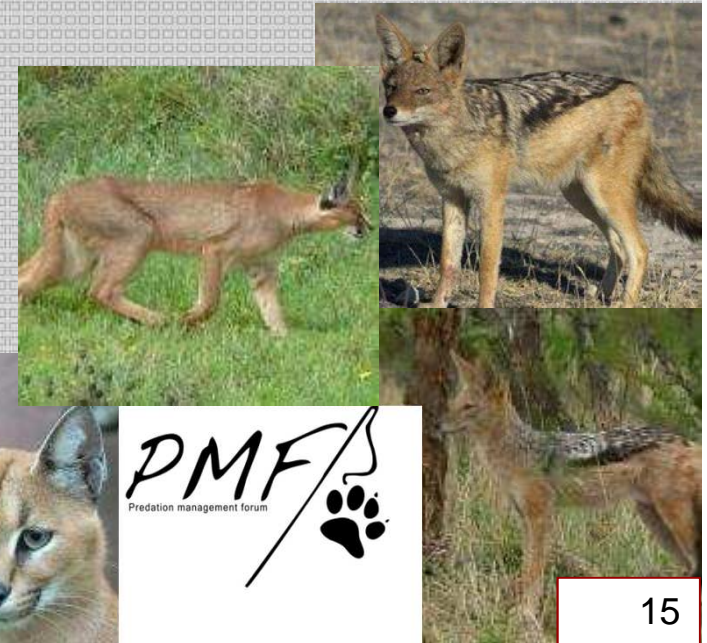
» **Goats**

> Stolen	35995	R 50 393 000
> Recovered	10078	R 14 109 200
> Loss	25 917	R 36 283 800

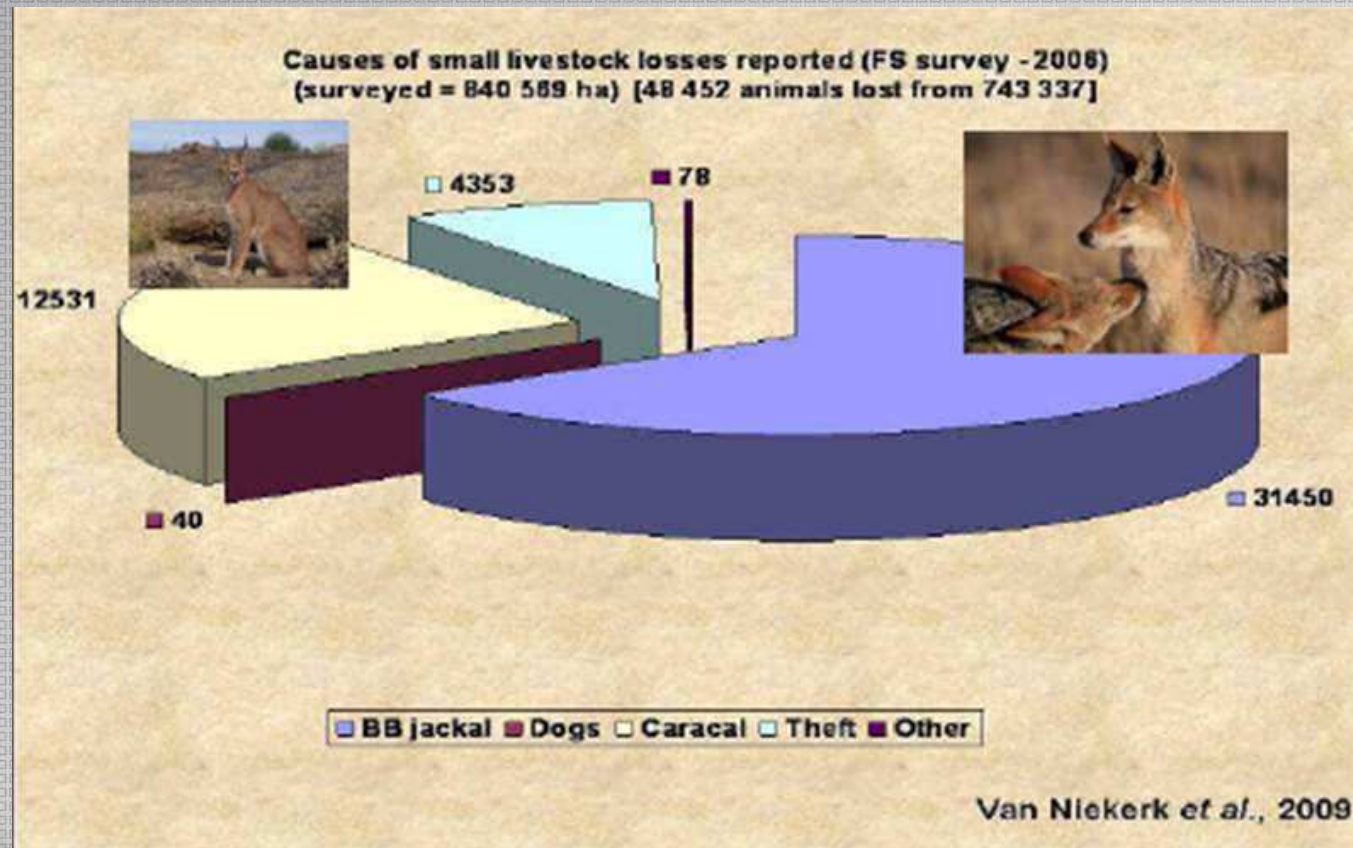
– CATTLE	:	R 7 500-00 per unit
– SHEEP	:	R 1 200-00 per unit
– GOATS	:	R 1 400-00 per unit

Challenges – *Predation*

- R1400 000 000 per annum in the small stock sector
- Large Stock ?
- Wildlife ?



Losses in Free State



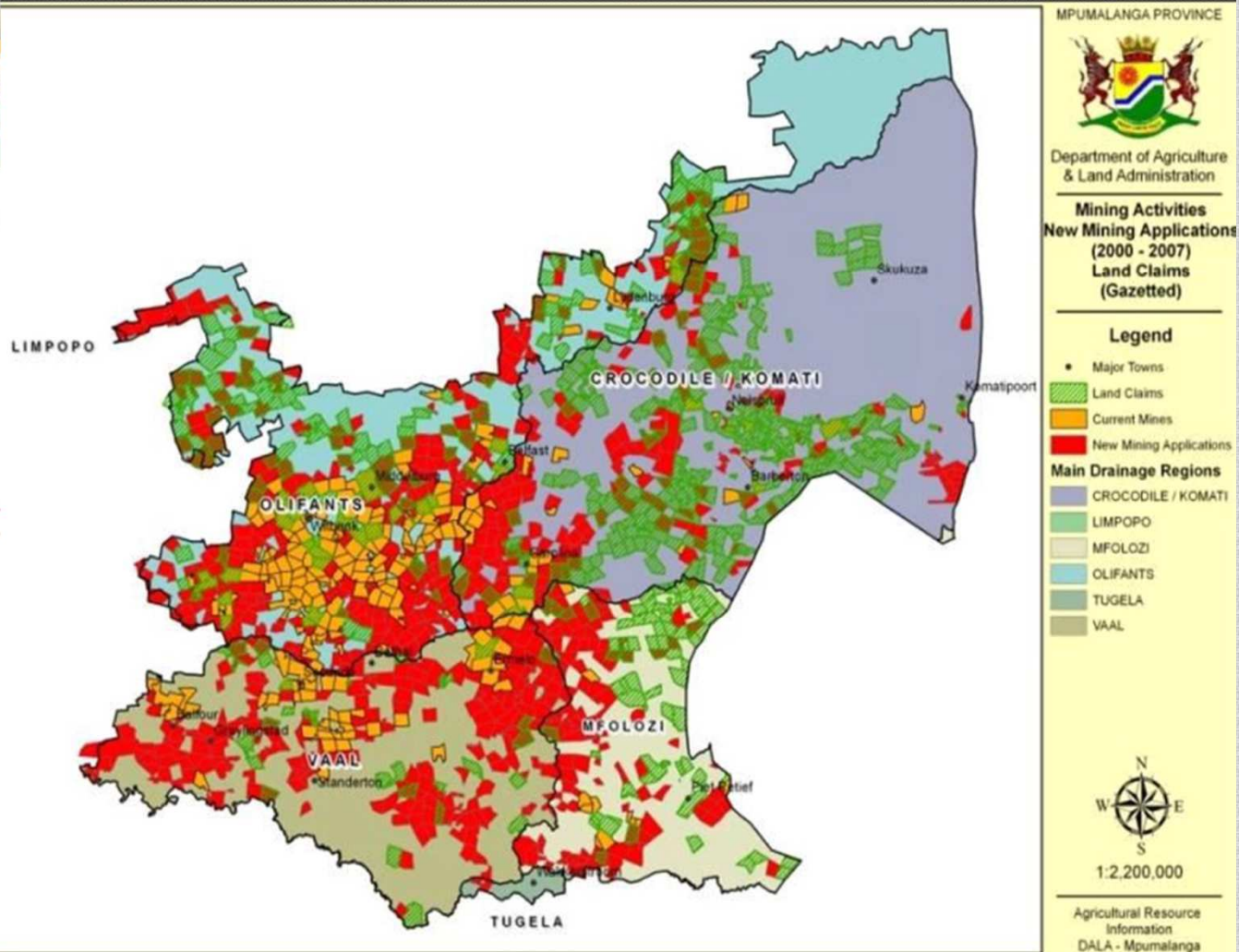
Challenges –

Game Ranching vs. Red Meat Production

- 9 600 adequately fenced game farms
- 1 800 ha average
- Foot and Mouth Disease
- Corridor disease
- Brucellosis
- Malignant Catarrhal Fever



Challenges – *Mining*

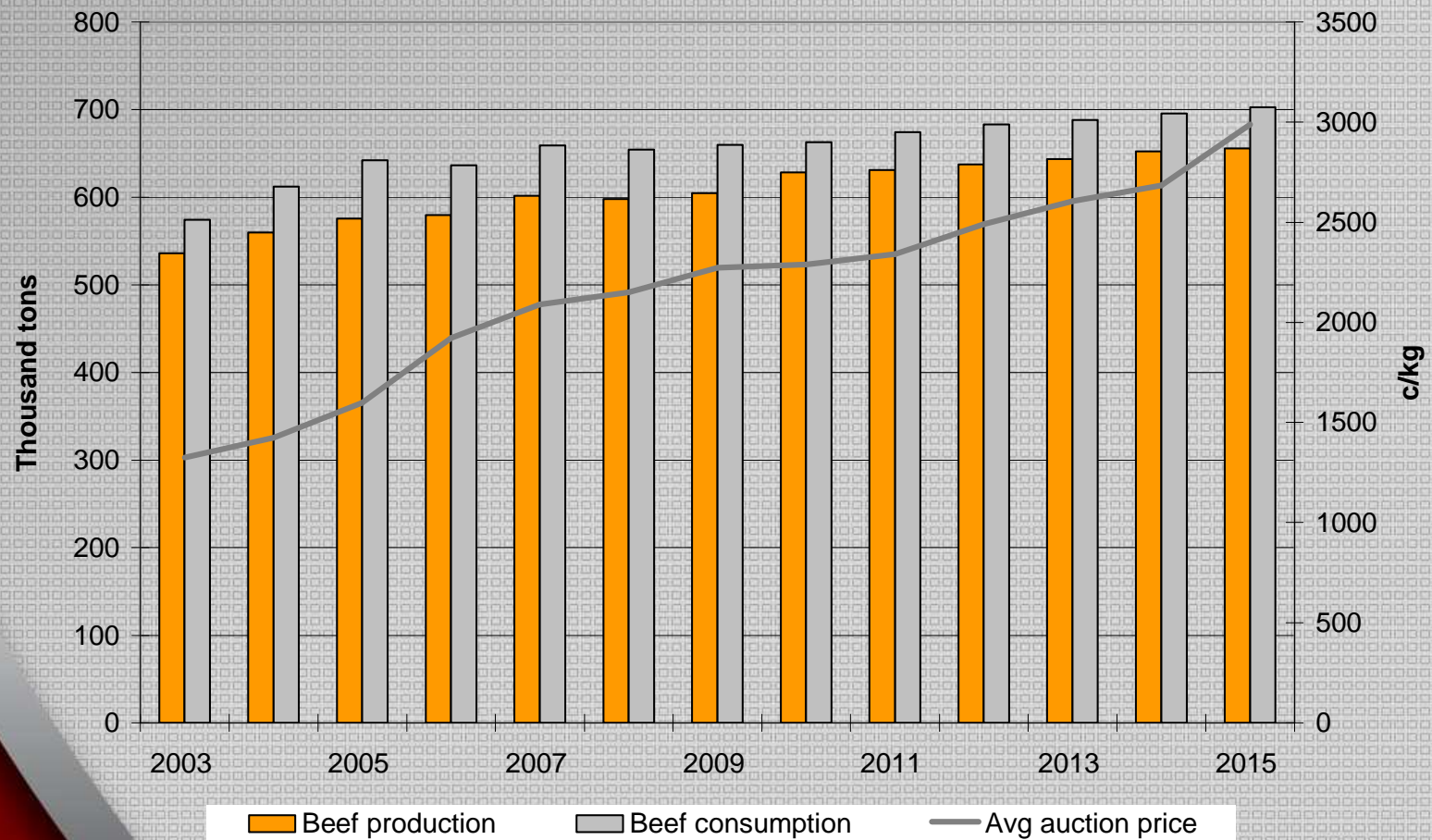


Challenges – *Research*

- South Africa is not meeting its agricultural research investment target of 3%
- Currently in the region of 2%

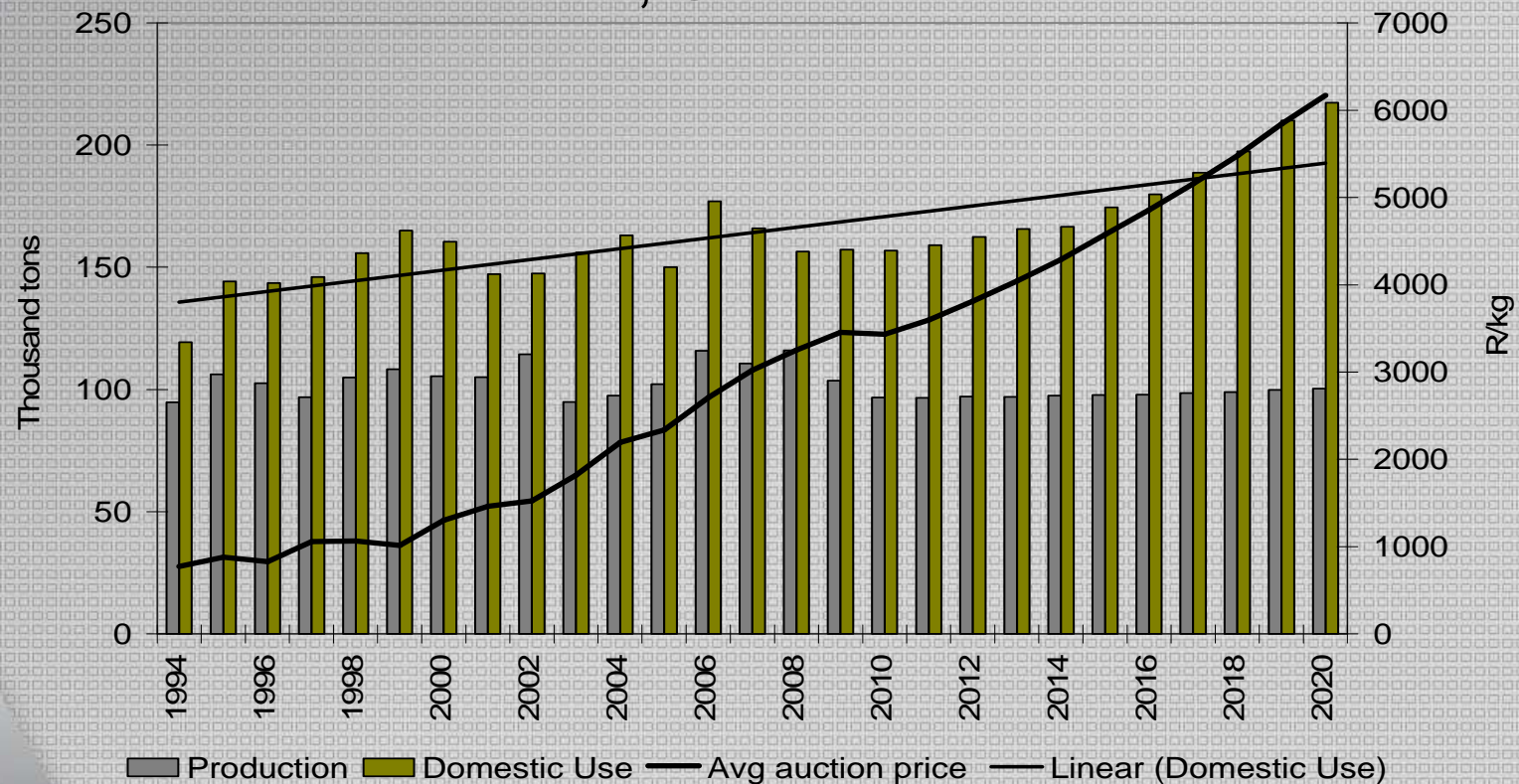
Conclusion

Beef Production, Utilisation and Price



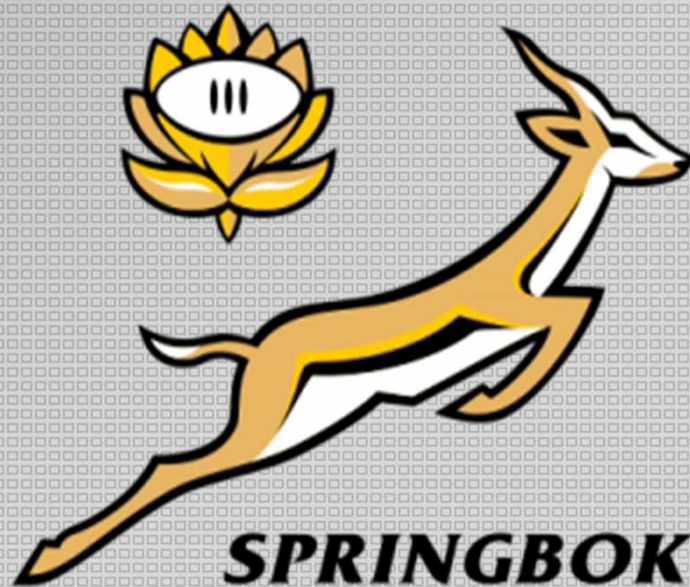
Conclusion Continued

Lamb Production, Utilisation and Price



- Emerging Sector
- Food Security

Thank You



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