

A Private Sector Perspective



Presented by:

Kadi Seisa – Managing Director
Leaf Holdings (Pty) Ltd t/a BotsBeef

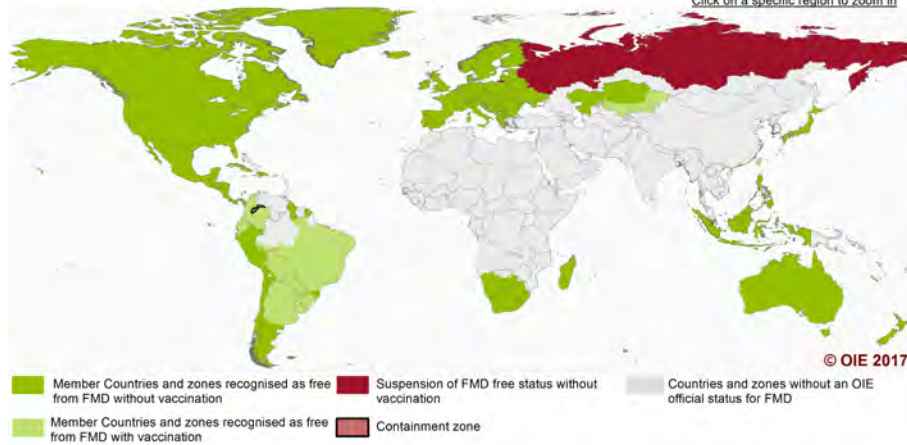


A WORLD OF POSSIBILITY

OIE Member Countries' official FMD status map

Last update December 2017

[Click on a specific region to zoom in](#)



FOCUS ON INDIA



HOW DID INDIA RANK 3RD ??

- According to “OECD-FAO OUTLOOK 2017 – 2026” India ranks third in global beef exports after Brazil and Australia
- Unlike Brazil and Australia; India has NO official FMD status
- Exported 1.56million tonnes of beef = 16% of global exports



INDIA AND CARABEEF

- India is a MAJOR supplier to most South East, Middle East & African markets
- **Since India does not have official FMD status; trade can only be through Bi-lateral trade protocols based on CBT principles.**
- **What can we learn from their successful trade model?**



Adapting the Indian model to our needs

- The common denominator is ACCESS
- The key difference is volume vs niche marketing
- We need to level the playing field in terms of access and use our Unique Selling Points (USPs) to compete

IS IT POSSIBLE?



NICHE MARKETING IN “OTHER” MARKETS

THE CASE OF ANGOLA



Botswana Beef In Angola

How do we sell our products to the market?

Collaborative approach with BMC and Distribution Partner

Products

- Started with CHILLED hindquarters (first movers)
- PRIME and SUPER Grade ONLY

Supply

- Supply feed-finished product from Francistown abattoir

Price

- **Premium pricing strategy**



CHANNELS

WHAT IS OUR ROUTE TO MARKET?



Hotels, Restaurants, Cafes (HORECA)

BUILT BRAND PERCEPTION WITH OPINION LEADERS (CHEFS) AND
DECISION MAKERS











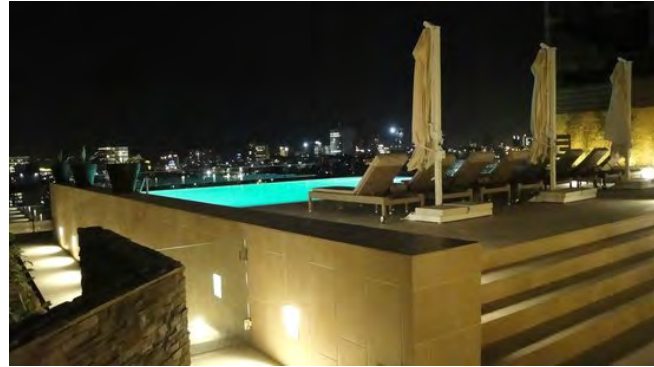
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RETAIL

MADE PRODUCT ACCESSIBLE TO HIGH AND MIDDLE INCOME CUSTOMERS

PURSUED GROWTH THROUGH EXPANSION OF RETAIL FOOTPRINT











Market-side Outcomes

Respected and highly sought after BRAND

Sales Performance

- Exponential revenue growth from a zero base

Price performance

- Consistent price growth year on year
- Best price performance outside Norway and EU
- Prices are similar, equal to and sometimes higher than certain cuts sold in EU



Supply-side Outcomes

- BMC restarted feedlot activity in Francistown in 2014 to meet demand
- We provide a market for weaners in zone 4A, 4B and recently zone 3B which are a non-EU green zone
- We have launched a program with BMC to expand non-EU feedlots in order to keep up with growing demand for QUALITY BOTSWANA BEEF



CAN WE ACHIEVE THE SAME IN NGAMILAND?



CURRENT MARKETING OF NGAMILAND BEEF

- Local trade
- Export of mixed grade frozen product to Mozambique, Vietnam & Kuwait
- Export of Live Cattle to Zimbabwe
- Issuing private abattoir with export license to DRC

Despite these efforts we have not been able to offer significantly better returns to Ngamiland farmers when compared to the rest of the country.

We have not been able to sustain the efforts due to disease outbreaks and the suspension of movement and slaughter.



Are we just selling beef?

WHAT ABOUT QUALITY???

- No active feedlot infrastructure for finishing cattle for export
- Current frozen finished product not separated by grade
- PERCEPTION – We have branded the Product as Red Zone Meat

**WE NEED A FUNDAMENTAL SHIFT IN HOW WE SELL OUR BEEF FROM
NGAMILAND**



A NEW APPROACH: “QUALITY, WILDLIFE-FRIENDLY BEEF”

POTENTIAL BENEFITS OF NICHE MARKETING FOR NGAMILAND FARMERS:

- NICHE MARKETING ALLOWS FOR HIGHER CDM / LIVE PRICES – **HIGHER RETURNS**
- WEANER PRODUCTION AS OPPOSED TO OXEN PRODUCTION = **RANGE PRESERVATION & POTENTIAL TO LESSEN CONFLICT WITH WILDLIFE**



HOW CAN CBT HELP??

- BASIS FOR AGREEMENT OF TRADE PROTOCOLS WITH TRADE PARTNERS.
- DEFINED POLICIES THAT DETERMINE REACTION TO DISEASE OUTBREAKS THAT WILL CREATE A CONDUCIVE ENVIRONMENT FOR INVESTMENT IN FEEDLOTS THEREBY **ALLOWING FOR PRODUCTION OF QUALITY PRODUCT.**
- VACCINATION TRESHOLDS CAN BE GUARANTEED THROUGH QUARANTINE AND FEEDLOT SYSTEMS TO FACILITATE EXPORT AND TRANSIT THROUGH NEIGHBOURING COUNTRIES



BOTSBEEF

THANK YOU

