



Government of Botswana



European Union

PUBLIC-PRIVATE DIALOGUE MEETING GABORONE 17 – 19TH NOVEMBER, 2014

BOTSWANA'S BEEF VALUE CHAIN FROM ASSETS TO INVESTMENT

1. OUTLINE OF THE BOTSWANA'S BEEF VALUE CHAIN

Botswana's beef sector is at a critical juncture. The sector is important for Botswana's rural population, and is an important source of export earnings. It has been highlighted as a strategic sector to be promoted to support the country's Economic Diversification Drive (EDD).

At the same time, it is hampered by structural problems, including an export monopoly and lack of scale, which reduce its commercial potential.



Recent years have seen a large reduction in the cattle population and the exit of significant numbers of commercial farmers from the sector. Weaknesses in the country's cattle traceability system prevented exports to the important EU market for 19 months in 2011-2012, and caused large disruptions in the domestic market as surplus meat was channelled into it. The sector's production, processing and export performance lags behind those of its competitors.

Botswana is currently in the process of implementing, at the national level, a number of policies and strategies.

These include the National Development Plan (NDP) 10 for the period 2009-2016; the Private Sector Development Strategy; the Agricultural Sector Marketing Strategy; and, in particular, Michael Porter's recommendations on implementing a clustering development approach to selected sectors where Botswana has a natural advantage, of which beef was identified as one.

Given the beef sector's strategic importance for Botswana's economy, a Value Chain Analysis and Development (VCAD) was undertaken by CDE and the International Trade Centre (ITC) in the framework of the Private Sector Development Programme (PSDP).

The objective of the VCAD was to identify bottlenecks and constraints in the sector's value chain, especially related to exports and Small, Micro and Medium-Enterprises (SMME), and propose an Action Plan to alleviate such constraints.

PSDP Botswana

Under the framework of the Private Sector Development Strategy (PSDS), the Ministry of Trade and Industry (MTI) and Botswana Confederation of Commerce, Industry and Manpower (BOCCIM), in partnership with the Centre for the Development of Enterprise (CDE), designed the Private Sector Development Programme (PSDP) which was launched on May 2013 in Gaborone.

The PSDP is meant to address some key areas of the PSDS. The PSDP which has been running since March 2013 for duration of 3 years has a budget of €2.3 million and aims to stimulate and sustain growth through diversification of the economy while building the capacities of institutions and human resources that support the private sector.

Other funding partners promoting specifically Women Entrepreneurship provide additional complementary support. The European Union (EU) is the contracting authority for the PSDP, the MTI is the supervising agency, CDE is the executing agency, and BOCCIM is responsible for monitoring and evaluation of PSDP.

2. WHY HOLD PUBLIC-PRIVATE DIALOGUE MEETING

Botswana's beef industry is complex, involving a range of actors and channels with diverse objectives and needs but dominated by the traditional beef cattle production systems. However, the potentials offered by this sector are enormous but only if entrepreneurial dynamism, use of modern technologies of production and processing, and linkages to premium markets are established. The beef VCAD offers opportunities for modernizing and integrating domestic, regional and international beef trade and access to markets.

The objectives of the beef stakeholders meeting are to present the outcome of the beef value chain analysis including the Action plan, and to facilitate the dialogue between the public and private sector entities involved in the beef industry as well as to benefit on the best practices from Southern Africa and European Union on the beef sector development. The meeting will also sensitize donors and financing institutions on supporting some components of the Action Plan in partnership with PSDP.

The outcome of this important meeting will be for participants to map a way forward for the sector to pursue and/or implement.

3. VENUE

The beef stakeholders meeting will be held in the framework of Global Expo from 17 to 19 November 2014 in Gaborone, Botswana. Global Expo is a platform for developing partnerships in Botswana.

4. PARTICIPANTS

- Ministry of Agriculture (MoA)
- National Strategy Office (NSO)
- Ministry of Trade and Industry (MTI)
- Botswana National Beef Producers Union
- SMMEs of the beef sector
- SADC beef associations
- EU beef associations
- Financing institutions and donors
- Intermediary Organisations (e.g. BEMA, BITC, BIH, BOCCIM, BOBS, BNPC, LEA, etc)
- Service providers of beef industry.

5. TENTATIVE PROGRAMME

17 NOVEMBER 2014: Plenary Sessions

Welcome remarks

- Representative of the MoA
- Representative of the EU Delegation for Botswana and SADC
- Southern Africa Regional Office, CDE

Session 1: Beef export market trends and Botswana performance

- Chairperson: Mr Lesego Selotane, Deputy CEO, CEDA
- Speakers: Mr Subhrendu Chatterji and Mr Agapitos Hatzipetros, International Trade Centre, Geneva.

Session 2: Restructuring the beef value chain for competitiveness

- Chairperson: Mr L. Sejoie, CEO, BITC
- Panellists: Agric-Hub, DABP, DVS, BMC, BVI, Farmers Associations.

Session 3: Market Intelligence Information System for the beef sector, a key tools for marketing

- Chairperson: Ms Maria Machailo Ellis, CEO BOCCIM
- Panellists: BITC, ITC, LEA, AgriSuite Online, Farmers Associations.

18 November 2014: Site visits

- Visit Lobatse farm
- Visit BMC processing plant at Lobatse

19 November 2014: Plenary Sessions

Session 4: Best practices on farming and beef processing: regional and international experiences

- Chairperson: Dr S. Ghanie, BMC
- Panellists: Southern African and EU Farmers and Beef producers associations
- **Closing Remarks - Way forward**
 - Mr Edmond Moabi, Coordinator, Agricultural Hub
- **Business to Business Meetings**

Abbreviations

BMC:	Botswana Meat Commission
BVI:	Botswana Vaccine Institute
BOBS:	Botswana Bureau of Standards
BOCCIM:	Botswana Confederation of Commerce, Industry and Manpower
BITC:	Botswana Investment and Trade Centre
CDE:	Center for the Development of Enterprise
CEDA:	Citizen Entrepreneurial Development Agency
DABP:	Department of Agri Business Promotion, MOA
DAP:	Department of Animal Production, MOA
DVS:	Department of Veterinary Services, MOA
EU:	European Union
ITC:	International Trade Center
MOA:	Ministry of Agriculture
MTI:	Ministry of Trade and Industry
NDB:	National Development Bank
NSO:	National Strategy Office
PSDP:	Private Sector Development Programme
SMME:	Small, Micro and Medium-Enterprises
VCAD:	Value Chain Analysis and Development

Centre for the Development of Enterprise

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