



Province of the
EASTERN CAPE
ECONOMIC DEVELOPMENT,
ENVIRONMENTAL AFFAIRS AND TOURISM

Livestock Value Chain Profile



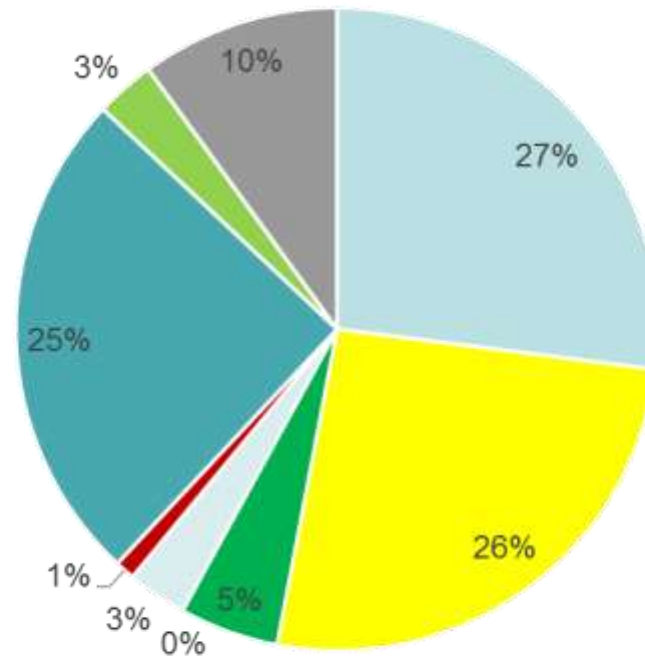
Leadership • Integrity • Flexibility • Teamwork

Sector Profile

- ❑ Wide variety of Climate types allows for wide range of products .
- ❑ Main cattle and sheep breeding region in South Africa
 - 21% of South Africa's cattle,
 - 29% of its sheep
 - 34% of South Africa's wool, 75% of its mohair
 - 27% of South Africa's milk production

Dairy sector

Milk Production



■ EC ■ WC ■ NW ■ NC ■ MP ■ LIMP ■ KZN ■ GP ■ FS

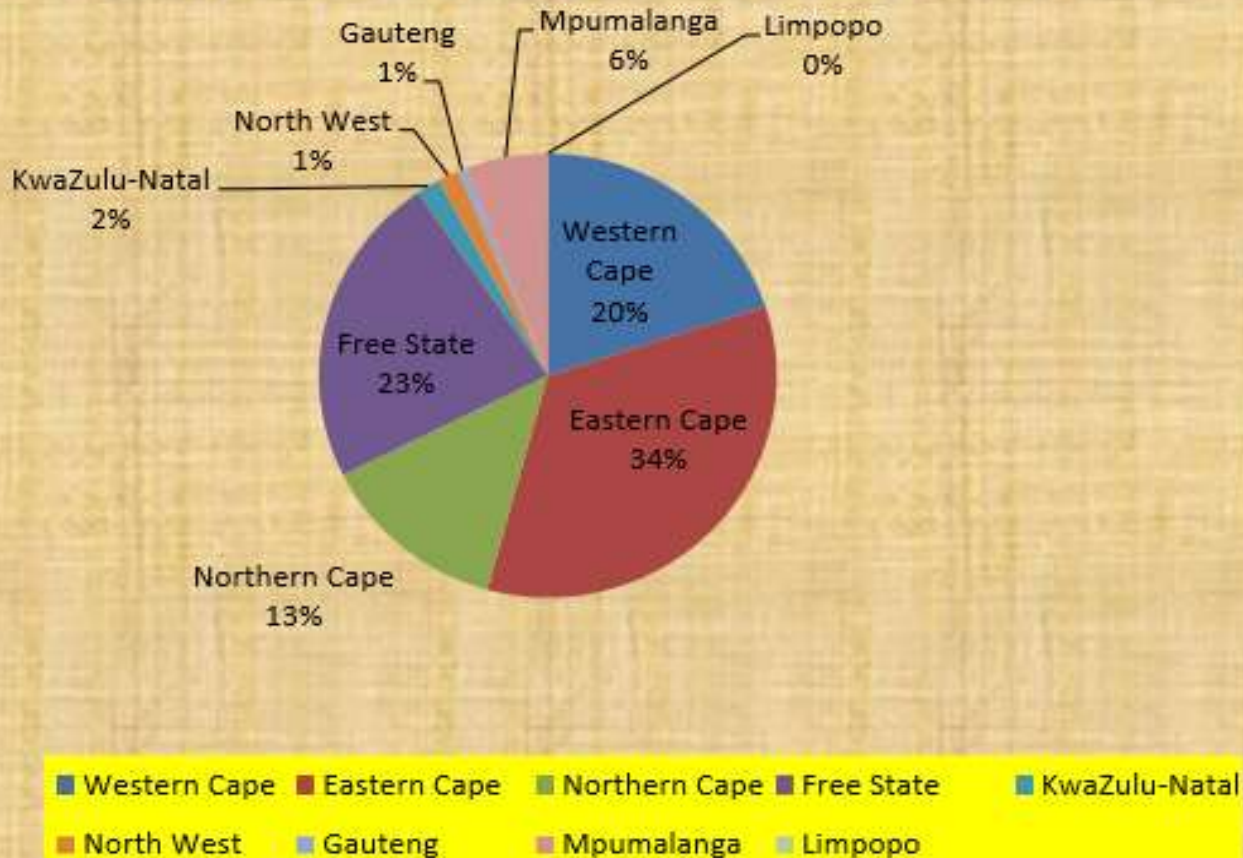


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Wool sector

Figure 2 : Wool production by provinces (2013/2014)



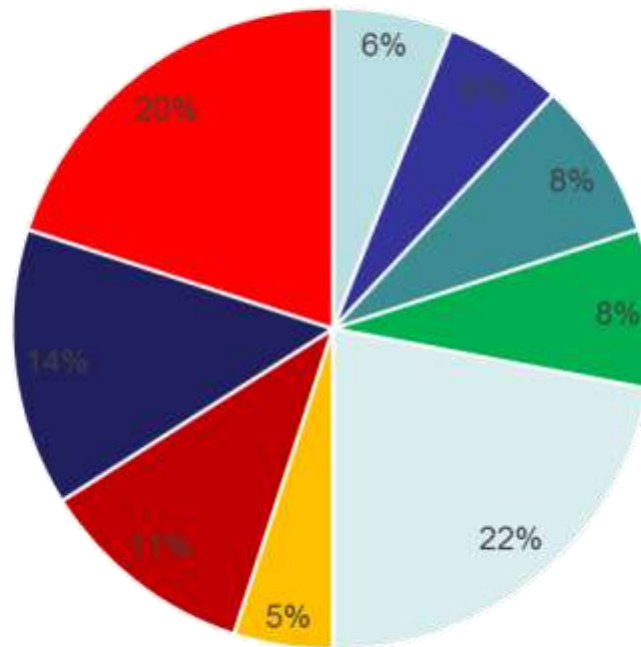
Source: Economic Analysis & Statistics, DAFF & Cape Wools

Red Meat Industry

- Beef is produced throughout South Africa.
- The amount of beef produced depends on the infrastructure such as feedlots and abattoirs, not necessarily by the number of cattle available in those areas.
- The EC is leading in terms of animal numbers
- However, the same cannot be said for the output

Sector performance

Slaughtering Beef



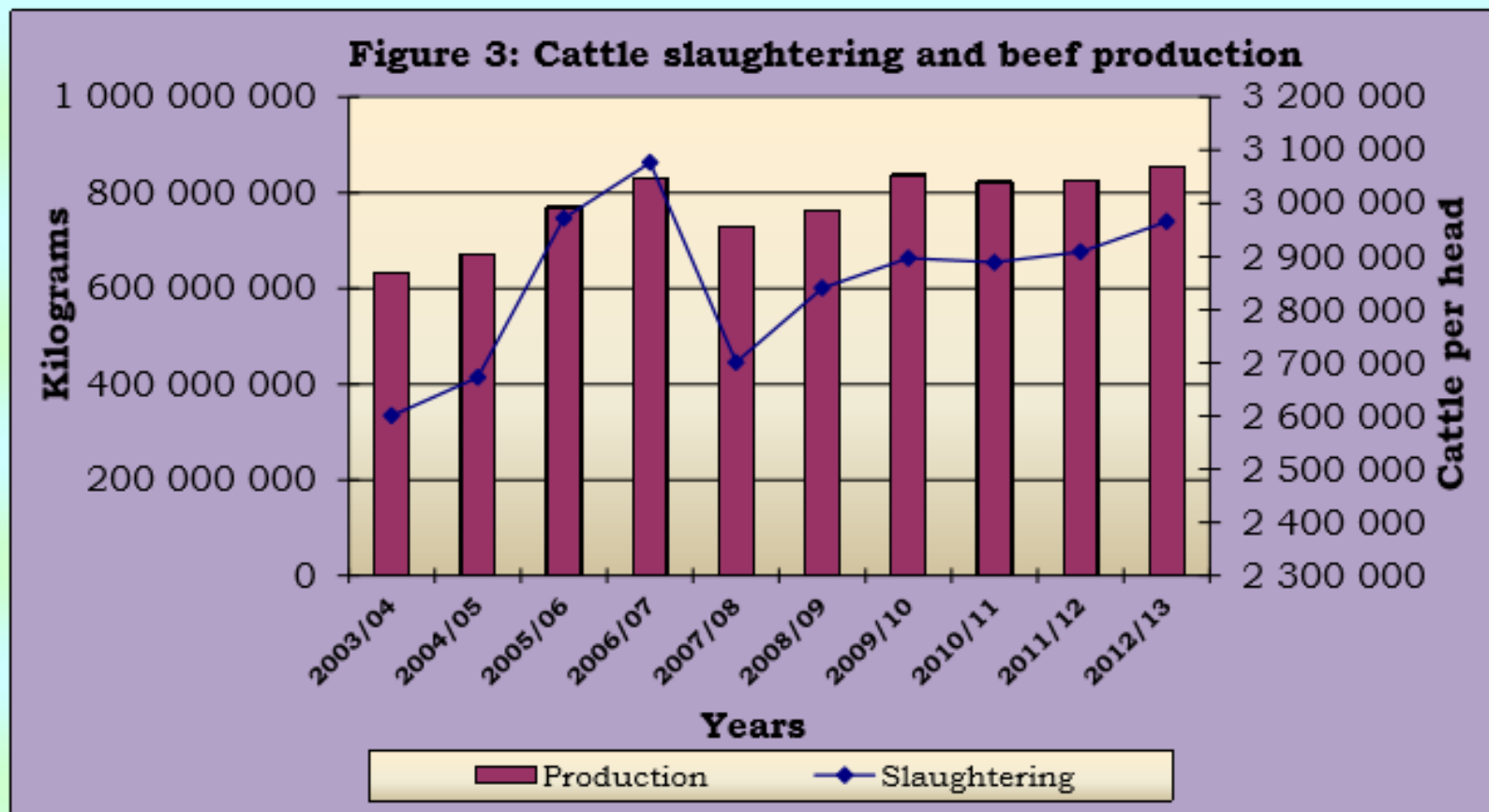
■ EC ■ WC ■ NW ■ NC ■ MP ■ LMP ■ KZN ■ GP ■ FS



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Sector performance



Source: Statistics and Economic Analysis, DAFF



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Sector performance

Table 1: Total cattle slaughtering, production and consumption of beef

Year	Cattle Slaughtering	Production	Consumption
	Head	Kilograms	Kilograms
2002/03	2,510,000	574,000,000	602,000,000
2003/04	2,535,000	610,000,000	643,000,000
2004/05	2,599,000	632,000,000	675,000,000
2005/06	2,671,000	672,000,000	723,000,000
2006/07	2,972,000	769,500,000	810,000,000
2007/08	3,077,000	830,700,000	849,000,000
2008/09	2,701,000	727,500,000	744,000,000
2009/10	2,841,000	763,600,000	767,000,000
2010/11	2 889 000	822 100 000	866 000 000
2011/12	2 909 000	823 300 000	859 000 000
2012/13	2 966 000	855 000 000	892 000 000

Source: Statistics and Economic Analysis, DAFF

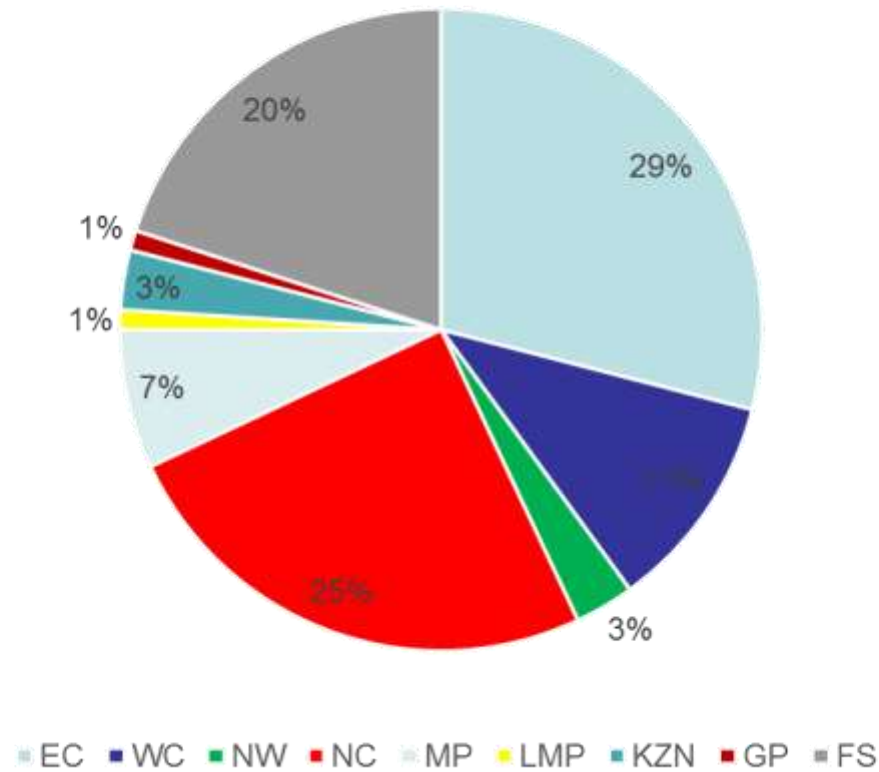
Sector performance

- EC – Abattoirs

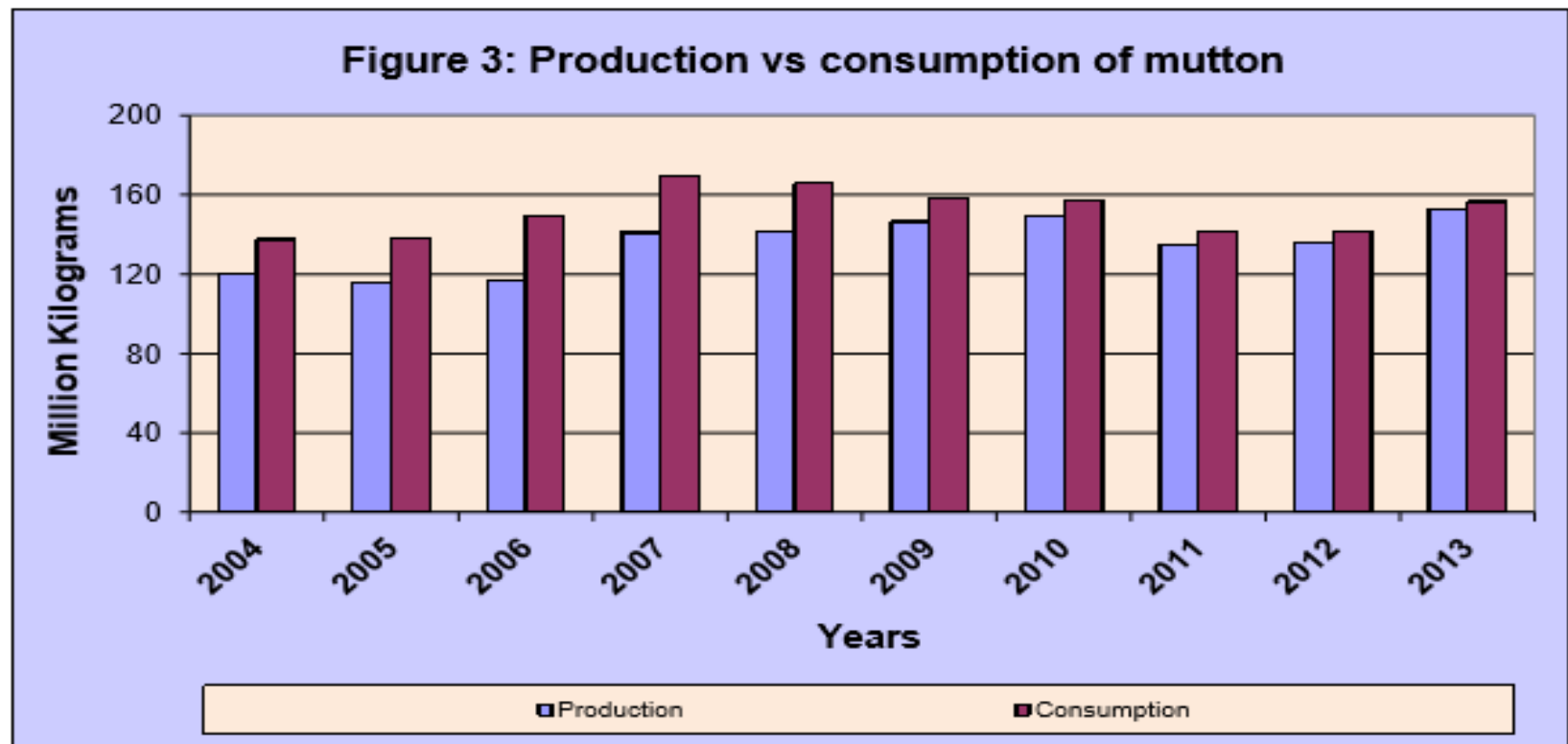
DISTRICT	RED MEAT ABATTOIRS				GAME ABATTOIRS				RED MEAT AND GAME ABATTOIRS (MIXED)				TOTAL PER GRADING			
	HT	LT	RT	TOTALS	HT	LT	RT	TOTAL	HT	LT	RT	TOTAL	HT	LT	RT	TOTAL
ALFRED NZO DISTRICT	-	1	-	1	-	-	-	-	-	-	-	-	-	1	-	1
AMATHOLE DISTRICT	3	2	3	8	1	-	-	1	1	1	1	3	5	3	4	12
CHRIS HANI DISTRICT	4	3	4	11	1	-	-	1	-	3	3	6	5	6	7	18
JOE GQABI DISTRICT	-	4	10	14	-	-	-	-	-	-	-	-	-	4	10	14
O.R. TAMBO DISTRICT	1	-	-	1	-	-	-	-	-	-	-	-	1	-	-	1
WESTERN DISTRICT	4	6	17	27	2	2	-	4	-	-	2	2	6	8	19	33
TOTALS	11	16	34	62	4	2	-	6	1	4	6	11	17*	22	40	79

Sector performance

Sheep numbers



Sector performance



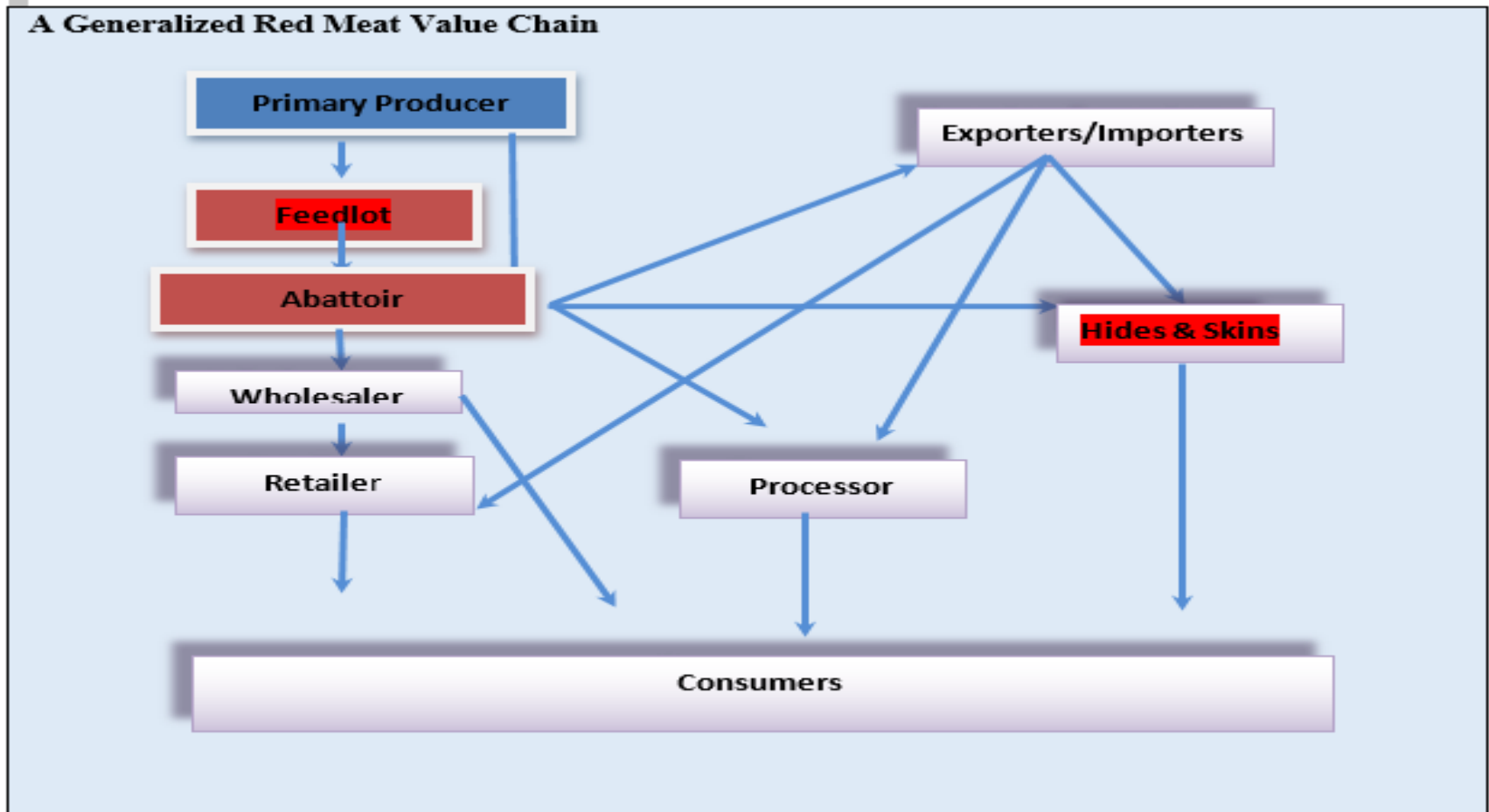
Source: Statistics and Economic Analysis and Quantec Easydata



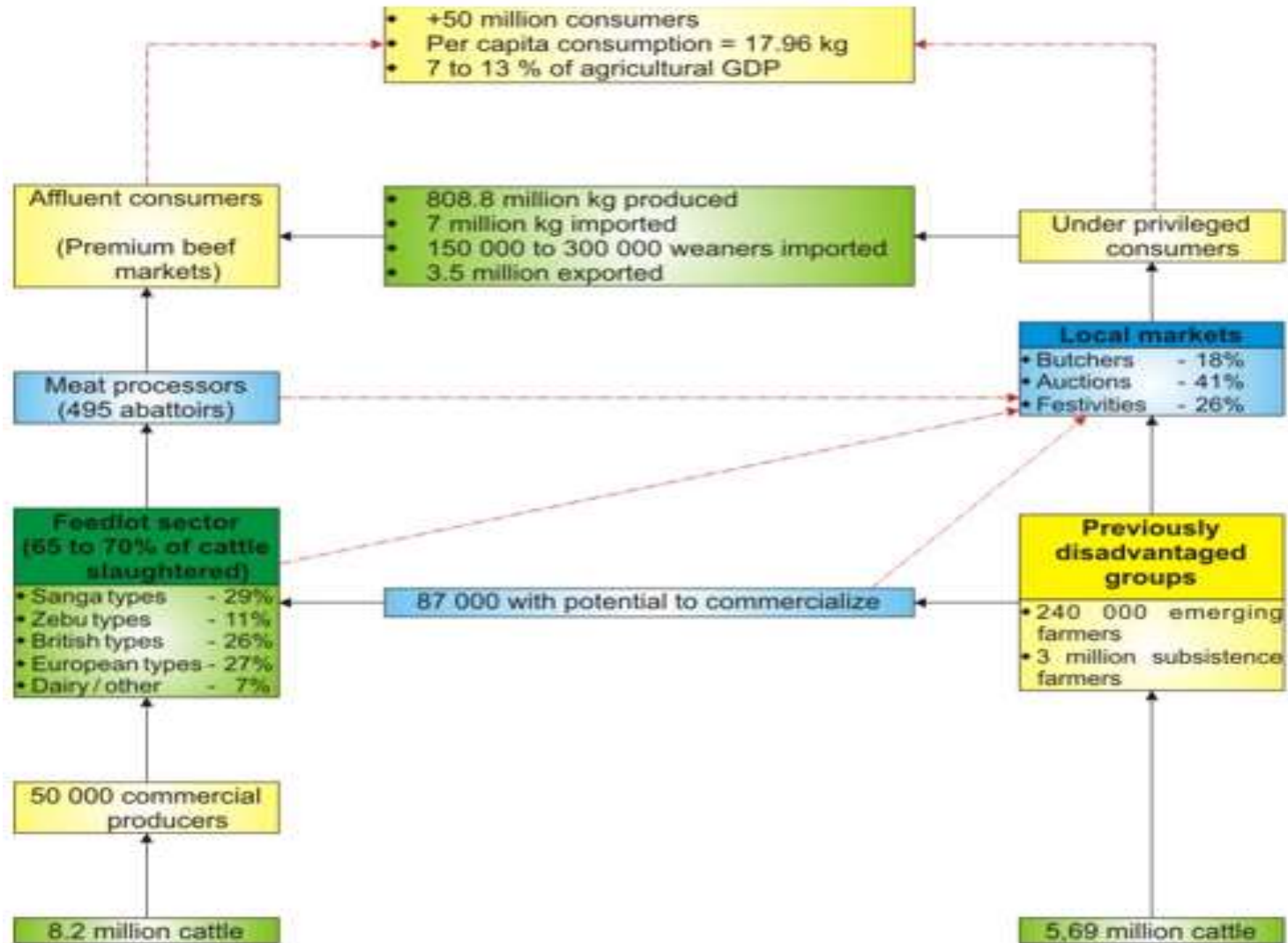
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Red Meat Value Chain



South Africa Specific Beef Value Chain



Source: ARC (modified)



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Conclusion

- Eastern Cape and South Africa are net importers of red meat
- The market outlook for red meat locally and globally is positive
 - local deficit -10% and global deficit - 20%.
- Development of the feedlot industry in the province
 - Complimentary industry – feed industry (grain and Lucerne)
 - Supply the high density, developed regions with meat (high value product) and not animals
- Development of the grass-fed beef industry
- Abattoirs operating below capacity
- With the wool and dairy industry leading – what happens with the mature sheep
- The opportunity is at our door step

Thank You



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VISION: *DEDEAT's vision is of a Province where economic growth and sound environmental management underpin sustainable development*

MISSION: *To lead economic development and environmental management in the Eastern Cape*