MINISTRY OF INDUSTRIALISATION,
TRADE AND SME DEVELOPMENT

Growth Strategy for Namibia's Taxidermy Industry and Associated Value Chains

Taxidermy Products

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FOREWORD

The Industry Growth Programme is part of the ongoing efforts to reinforce Namibia's economic growth, to reduce income inequality and to increase employment for its citizens. This Industry Growth Strategy forms part of the support to selected manufacturing industries envisaged by the Growth at Home strategy, which promotes Namibia's competitive advantages and opportunities. This is envisaged through the Special Industrialisation Programme whose aim is to provide targeted support for value chain analyses and feasibility studies.

It is through the implementation of this and other strategies that the Ministry of Industrialisation, Trade and SME Development, in close cooperation with other line ministries, will support local value addition, upgrading and economic diversification. The efforts will help to structurally transform Namibia's economy favouring the most productive and efficient economic activities, and local industries will be provided with improved market access at home and abroad.

The Industry Growth Programme is an important element of the war against poverty and a further step on Namibia's path towards becoming a highly competitive, industrialised nation with sustainable economic growth as depicted in Vision 2030. As such, this strategy's implementation through 2020 is geared towards strengthening forward and backward linkages within the Namibian economy as envisaged in the Harambee Prosperity Plan.

Taxidermy is a strategic industry that has, in agreement with the fourth National Development Plan, been selected for a more specific focus on its economic development. Key stakeholders from the business community and public administration who have a vested interest in the Namibian industry's prosperity for the benefit of all have engaged in extensive consultations and substantially contributed to this programme. They are now eager to implement interventions along the value chain effectively.

Many of the suggestions and concerns raised by entrepreneurs and civil servants in extensive discussions have been distilled into this document. This interactive process has once more demonstrated that Namibians together can shape an enabling environment in which the manufacturing sector can thrive and the wellbeing of the Namibian people be advanced.

I am sure that the Industry Growth Strategies have the potential to remove challenges and accelerate economic development in the prioritised areas. The interventions planned for 2016 onwards will allow the targeted industries to prosper according to their inherent abilities. This strategy is a living document. As such, additional comments or remarks from stakeholders are welcome and can be addressed to the Ministry of Industrialisation, Trade and SME Development.

I am confident that, in the vein of the Harambee Prosperity Plan, all stakeholders involved will pull in the same direction in the upcoming implementation phase – as they have done in strategy building – for the advantage of a thriving Namibian economy that creates jobs, incomes and sustainable growth.

Hon. Immanuel Ngatjizeko
Minister of Industrialisation, Trade and SME Development

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TABLE OF CONTENTS

ACRONYMS AND ABBREVIATIONS

EU	European Union
FMD	Foot-and-Mouth Disease
GNP	Gross National Product
HS	Harmonized Commodity Description and Coding System
ISIC	International Standard Industrial Classification for All Economic Activities
ITC	International Trade Center
MET	Ministry of Environment and Tourism
MITSMED	Ministry of Industrialisation, Trade and SME Development
NAD	Namibia Dollar
NAPHA	Namibia Professional Hunting Association
NTA	Namibia Training Authority
OABS	Optimal Agricultural Business Systems
PH	Professional Hunters
PPD	Public Private Dialogue
SADC	Southern African Development Community
SME	Small Medium Enterprise
UNEP	United Nations Environment Programme
US	United States
USD	United States Dollar
VCF	Veterinary Cordon Fence
WBLU	Wildlife- Based Land Use
WTTC	World Travel and Tourism Council

1. NAMIBIA'S TAXIDERMY INDUSTRY AND ITS VALUE CHAIN

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1.1 Industry Definition

According to the United Nation's International Standard Industrial Classification of All Economic Activities (ISIC) Revision 4, taxidermy activities are part of Division 32 (Other Manufacturing) which encompasses the manufacture of a broad variety of goods not covered in other parts of the ISIC. Because it is "a residual division, production processes, input materials and use of the produced goods can vary widely, and usual criteria for grouping classes into divisions have not been applied here". Taxidermy activities are incorporated in class 3290 (Other manufacturing n.e.c.). This class includes, amongst other things, the manufacture of safety equipment and the manufacture of shoe and clothes brushes, to name but a few examples.

In the context of this growth strategy document for Namibia's taxidermy industry, the Harmonized Commodity Description and Coding System (HS) was used to classify traded products. Under the Harmonized System, taxidermy is classified under codes 9705 (4-digit) and 970500 (6-digit), which cover Collections and collectors' pieces of zoological, botanical, mineralogical, anatomical, historical, archaeological, palaeontological, ethnographic or numismatic interest. This has to be considered the main code for taxidermy products, as there is no further break down in the code covering taxidermy specifically. However, in certain cases, manufactured taxidermy products can also be derived from non-classic trophy activities. An example would be a game fur a customer buys for home décor purposes. With regards to the HS, this falls under code 43 – Furs and artificial furs, manufactures thereof. On the other hand, carved products made of horn would be classified under 960190 (Animal carving material other than ivory, and articles of these materials).

1.2 Global and regional industry performance

Although the preparation and conservation of dead animals has been practiced in many countries since the 16th and 17th centuries, it has always remained a niche industry. Along with providing services to hunters, nowadays taxidermists also work with museums and process deceased pets, amongst various other things. Most countries have a more or less developed local taxidermy industry, sometimes with associations which not only represent their members' interests but also organise national taxidermy competitions (e.g. in the US).

Because taxidermy has such a long tradition, it has been seen as old-fashioned and as a sector only servicing hunters. However, in recent years, some shifts have taken place which have given the industry new opportunities for growth. As one example, taxidermy benefits from a worldwide trend towards 'bringing nature back into homes', as this also includes the use of processed animals as upscale home décor items. The Washington Post even called this trend "taxidermy chic" (Washington Post, 2013). Due to these developments, taxidermy products are used in art, fashion and design in general. Because of this new interest from other sectors using taxidermy products in innovative and trendy ways, the industry is experiencing a kind of a renaissance, attracting more younger taxidermists as well as females in a traditionally male-dominated profession (Smithsonian Magazine 2015). This trend could also be an opportunity for Namibian taxidermists to broaden their product ranges and improve their businesses.

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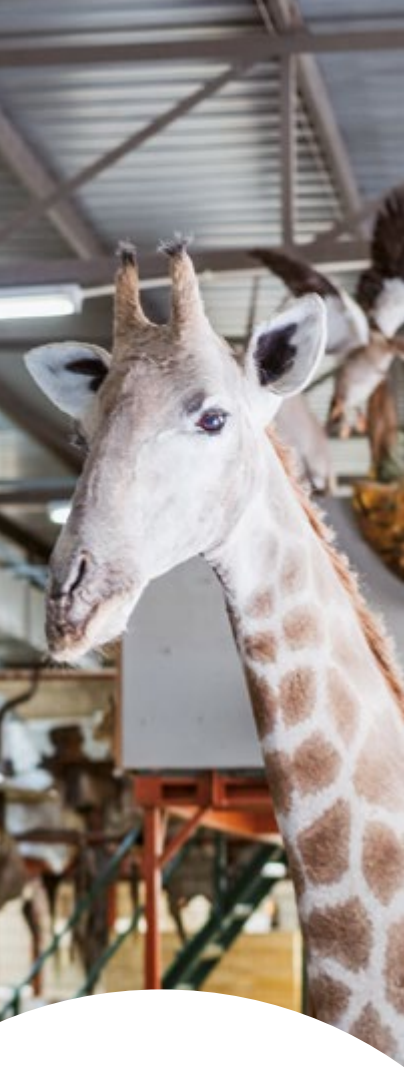

On a regional level, taxidermy is still mainly used for processing trophies for hunters[1]. However, trade data regarding exports by SADC countries show a general decline since 2012 (see Figure 1).

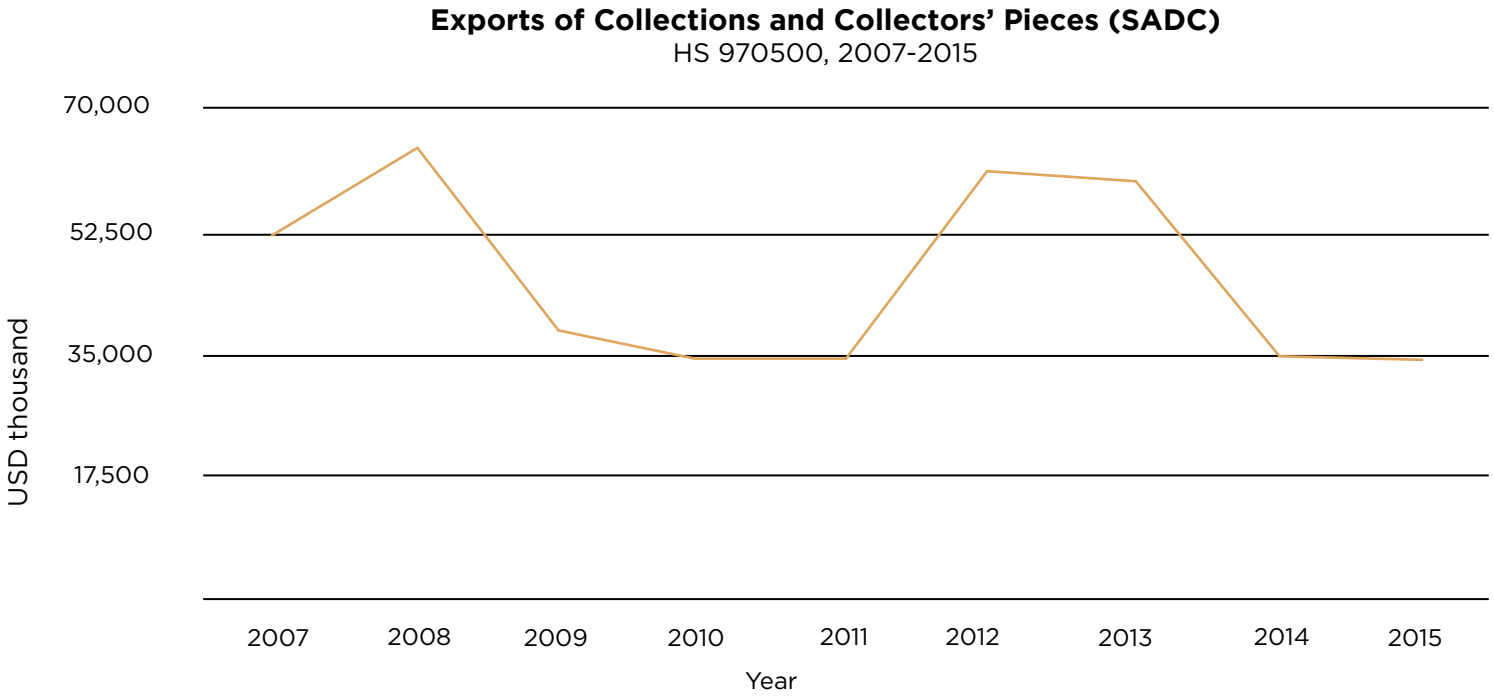

Figure 1: SADC's exports (in USD) of collections and collectors' pieces (code 970500)[2], 2007–2015
Source: ITC calculations based on UN Comtrade statistics

[1] Internationally, trophy hunting is a controversial issue; there are regular requests for bans on the practice, especially concerning game in Africa.

[2] Due to the lack of trade data available for taxidermy as a standalone code in the HS, the main code (970500) will be used throughout this document as a reference point.

1.3 Industry Background and Evolution in Namibia

When trophy hunting was first introduced in the late 1960s, game ranching and trophy hunting were completely unknown forms of land utilisation in Namibia. Instead, wild animals were seen to be in direct competition with domestic stock for grazing and water and therefore regarded as a liability for stock farmers. Farmers soon realised that game indeed had a value, and they came to regard their wildlife not as a liability but as an asset. As a result, the numbers of wild animals on private farmland have increased dramatically. Especially since 1994, trophy hunting has shown increasing growth in Namibia. The local government has anchored the lasting use of their natural riches in the constitution. Hence, it is possible to regulate trophy hunting through legal means.

Wildlife-based land use (WBLU) is increasingly common in Namibia. Approximately 288,000 km^2 of freehold land is used for WBLU, and 32,000 km^2 is used exclusively for wildlife production, e.g. without livestock (Lindsay, 2011). About 88% of Namibia's wildlife is found on freehold land or commercial farms, 8% in communal areas and just 4% in state-protected areas (Mendelsohn et al., 2006). There has been a noticeable shift towards wildlife-management practices on freehold farms in recent years, partly in response to bush encroachment and the reduced carrying capacity of the land for livestock as well as to the gainful returns from game products and tourism.

Hunting and taxidermy are interdependent, as taxidermy adds value to unprocessed hunting trophies through specialised skills and expertise, turning them into high-value, sought-after, custom-made products. Taxidermists also perform dip and ship (also called dip and pack) and make curios in some cases.

Many hunting visitors gladly return to Namibia because their first trophy-hunting safari completely met their expectations and wishes. These hunters are key influencers for others who also would like to go on hunting vacations to Namibia. The consumer segment serviced is mainly the USA and the European market. Many of these clients are affluent hunters who enjoy the thrill of the hunt and will return, together with their families, year after year. The second type of hunter is also from abroad but normally has to save up for an 'African hunting safari experience'.

1.4 Classification of Namibian Producers and Businesses

The exact number of taxidermists in Namibia is unknown, but the number of EU TRACES–registered companies with certificates for the year 2014/2015 is 22 (see Table 1).

Namibia offers a variety of hunting opportunities to meet most requirements and budgets at prices determined by quality. The primary product (live game suitable for trophy hunting) is usually supplied by farmers who either have mixed farming enterprises that combine sheep or cattle with game farming or specialise in game farming only. Farm hunting is a very popular form of trophy hunting in Namibia, especially amongst clients from Europe. Species offered depend on the area but are usually limited to common Namibian game species such as kudu, gemsbok, hartebeest, springbok, warthog, Hartmann's mountain zebra, duiker, steenbok, jackal and baboon. Cheetah, leopard and caracal are often hunted as well. Farm hunting has been developed by stock farmers who wished to diversify their income sources, so hunting usually takes place alongside normal farming activities amongst domestic livestock such as cattle, goats and/or sheep.

In recent years, conservancies have been developed into commercial farming areas so that farmers can cooperate on the conservation and sustainable utilisation of their combined wildlife resources; this has the added benefit of increasing the hunting area as well as the range of species offered on the farm hunt. The host is usually a hunting guide or master hunting guide, and this setup is mostly used by budget-conscience trophy hunters.

Many hunting visitors gladly return to Namibia because their first trophy-hunting safari completely met their expectations and wishes. These hunters are key influencers for others who also would like to go on hunting vacations to Namibia.

Table 1: Approved or registered taxidermists, tanneries and dipping plants issued certificates by EU TRACES (2014/2015)

Approval Number	Name	Town	Region	Date of Registration/Re-inspection	Expiry Date	Category
NAM 001	Agra Co-operative (Ltd)	Windhoek	Khomas	28-Jun-14	28-Jun-15	Collecting, storage and handling center for Karakul pelts
NAM 002	Nakara Tannery	Windhoek	Khomas	28-Jun-14	28-Jun-15	Tannery
NAM 003	Okapuka Tannery	Windhoek	Khomas	28-Jun-14	28-Jun-15	Tannery
NAM 004	Nyati Wildlife Art cc	Windhoek	Khomas	28-Jun-14	28-Jun-15	Taxidermy
NAM 006	African Wildlife Taxidermy	Gobabis	Omaheke	28-Jun-14	28-Jun-15	Taxidermy
NAM 007	Namib Taxidermy	Omaruru	Erongo	28-Jun-14	28-Jun-15	Taxidermy
NAM 008	King's Taxidermy	Otjiwarongo	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 009	Studio Taxidermy	Otjiwarongo	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 010	Marabu Trading cc	Otavi	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 011	Trophaendienste cc	Windhoek	Khomas	28-Jun-14	28-Jun-15	Taxidermy
NAM 012	Smart Dip Namibia	Windhoek	Khomas	28-Jun-14	28-Jun-15	Dip & Ship
NAM 14	Reiser Taxidermy	Windhoek	Khomas	28-Jun-14	28-Jun-15	Taxidermy
NAM 15	Otjandaue Hunting Safaris	Omaruru	Erongo	28-Jun-14	28-Jun-15	Taxidermy
NAM 4/13	Mooiplaas cc t/a Aftehunt Trophy Art Services	Gobabis	Omaheke	28-Jun-14	28-Jun-15	Taxidermy
NAM 17	Casper's Taxidermy	Grootfontein	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 19	Erongo Taxidermy cc	Otavi	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 20	Tau Taxidermy	Windhoek	Khomas	28-Jun-14	28-Jun-15	Taxidermy
NAM 21	Hunter's Pride Taxidermy cc	Gobabis	Omaheke	28-Jun-14	28-Jun-15	Taxidermy
NAM 22	Retoma Taxidermy	Outjo	Kunene	28-Jun-14	28-Jun-15	Taxidermy
NAM 23	Otjiwarongo Taxidermy cc	Otjiwarongo	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 23/12	J&E Kotze Omatako Hunting Safaris	Okahandja	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 2/13	Ingwe Wildlife art cc	Okahandja	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 24	R&L Farming	Omaruru	Erongo	28-Jun-14	28-Jun-15	Taxidermy
NAM 25	Jan Oelofse Hunting Safaris	Otjiwarongo	Otjozondjupa	28-Jun-14	28-Jun-15	Taxidermy
NAM 26	Seeheim Taxidermy cc	Keetmanshoop	//Kharas	28-Jun-14	28-Jun-15	Taxidermy
NAM 27	Western Trading Curio World cc	Mariental	Hardap	28-Jun-14	28-Jun-15	Taxidermy
NAM 27	Otjiwarong Crocodile Farm	Otjiwarongo	Otjozondjupa	28-Jun-14	28-Jun-15	Tannery

Source: EU TRACES

Private hunting on dedicated wildlife areas in the form of private game ranches, with no domestic stock or interior fences, is becoming increasingly popular in Namibia. The spectrum of trophies available is very diverse and includes species such as sable, blesbok, giraffe, Cape eland, Livingstone eland, black wildebeest, blue wildebeest, waterbuck, southern impala, Burchell's zebra, steenbok, duiker, tsessebe, white rhino, roan, cheetah, leopard, caracal and the endemic species including Damara dik-dik, black-faced impala and Hartmann's mountain zebra, as well as all the common species. Prices range from moderate to expensive based on quality. Namibia has 50 registered communal conservancies, covering approximately 120,000 square kilometres, or 14% of the country (Lamprecht, 2007). These hunting concessions are in tribal areas where, until recently, communities often found themselves in direct conflict with wildlife for the natural resources. Trophy hunting, both as a wildlife-management tool and as a commercial industry, holds great advantages for communal conservancies; it is now firmly established as the primary source of income for these often marginalised and remote communities, where Namibian professional hunters have entered into contracts with the tribal authorities. Most hunting for the big five takes place in these areas, which have produced some of the largest elephants taken on the African continent during the past decade. This setup is used by adventurous trophy hunters who want to experience 'old Africa' in rugged, remote, very scarcely populated areas.

The Namibian government adopted a policy to regulate the granting of tourism and trophy-hunting concessions on state-owned land, which includes game parks, protected areas and communal areas. This policy was developed to be the basis of new legal provisions concerning concessions that are to become part of the future Parks and Wildlife Management Bill. The new policy lays down clear objectives and principles for the granting of concessions, including empowerment objectives for the communities living in these areas (Lamprecht, 2007).

Taxidermy companies are widespread throughout Namibia, and interaction among different businesses is low because they are dealing with clients and suppliers individually and there is no industry body for the sector. However, taxidermists have attempted to meet once annually during the last three years, a new initiative started by some of the bigger taxidermy companies. This could indicate a need in the industry to cooperate more closely to promote their interests.

On the other hand, the interaction between taxidermy companies, outfitters and shipping agents is very high, as they are interdependent. At the moment, outfitters are the ultimate link between the hunter clients and their coming to Namibia for safaris. In this regard, outfitters act not only as promoters for Namibian hunting but also for the local taxidermy sector. They have a substantial influence on the decision whether value addition to a trophy will happen in Namibia or not. The outfitter normally has one taxidermist whom they promote and work with on a regular basis.

One can also find dip and ship outfitters who register as dip and ship stations compliant with EU TRACES. They do the preparation in the field after the animal has been shot and deliver an unprocessed product directly to the shipping agent. The exact number of dip and ship outfitters is unknown.

Outfitters make use of the services of professional hunters (PH), who can source the client or trophy hunter from overseas and join the hunter in the field during the hunt itself. The PH can also prepare the trophy after the animal has been shot in the field. The outfitters and the professional hunters play a very dominant role in this value chain, as they are the actors who source the hunters from abroad, and without their intervention there would be minimal or no products for the taxidermy companies to process.

There are almost 500 hunting providers registered with the Namibia Professional Hunting Association (NAPHA), which makes it possible for clients to hunt for trophy game species tailored to their wishes, whether on a hunting ranch, on a guest farm or in the form of a classic

All hunting resorts are under the strict supervision of the Directorate of Resource Management of the Ministry of Environment and Tourism (MET). The MET provides the overall legislative parameters and issues, amongst other things, registration certificates to hunting professionals and the permits needed for trophy hunting.

Table 2: Exported taxidermy products as perceived by industry stakeholders

Export Countries	Taxidermies		Shipping Agents	
	Dip and Pack	Mounts	Dip and Pack	Mounts
EU	60%	20%	60%	20%
USA	35%	70%	35%	40%
Rest of the world	5%	10%	5%	40%

Source: Optimal Agricultural Business Systems (OABS)

hunting safari in gigantic conservancies on a local level (concession areas). With the exception of the primary sector in the value chain (PHs, outfitters and game farmers), which is governed by the NAPHA, there is no formal governance in the rest of the value chain. For the international hunting clientele, one of the main attractions of hunting in Namibia is the high standard of ethics maintained by the NAPHA. Its fundamental purpose is to enhance and maintain an organisational infrastructure that can serve professional hunting members, clients and other interest groups. Their intent is to ensure and promote ethical conduct and sustainable utilisation of natural resources and to secure the industry for current and future generations (NAPHA website, 2015).

All hunting resorts are under the strict supervision of the Directorate of Resource Management of the Ministry of Environment and Tourism (MET). The MET provides the overall legislative parameters and issues, amongst other things, registration certificates to hunting professionals and the permits needed for trophy hunting. The MET also allows the NAPHA input on laws and regulations for trophy hunting in Namibia.

Along with their relationship with outfitters, taxidermy companies also work closely with shipping agents. The shipping agents receive processed and unprocessed trophies for shipping and in some cases provide the packing and all the export documentation, including veterinary clearance, and book the air or sea freight. All shipping agents (ca. 5–6) are situated around Windhoek. They are also allowed to register as dip and ship stations compliant with EU TRACES. They then collect the unprocessed product directly from an outfitter. There is currently one dip and ship shipping agent that is EU TRACES registered and issued with a certificate for the year 2014/2015.

For this study, interviews with industry stakeholders were conducted. This was necessary because available and reliable data are limited for this industry in Namibia; the findings of the interviews also contributed to possible interventions to uplift the sector, as described in Chapter 3. During interviews, taxidermists and shipping agents shared their perceptions concerning the exports of different taxidermy products (see Table 2).

Interestingly, both value-chain actors perceive the amounts of dip and pack products exported to the EU, the USA and other countries to be the same but differ a great deal with regards to mounted products.

Based on the information provided by industry stakeholders, a taxidermy value chain for Namibia has been drafted incorporating the relevant actors and their relationships.

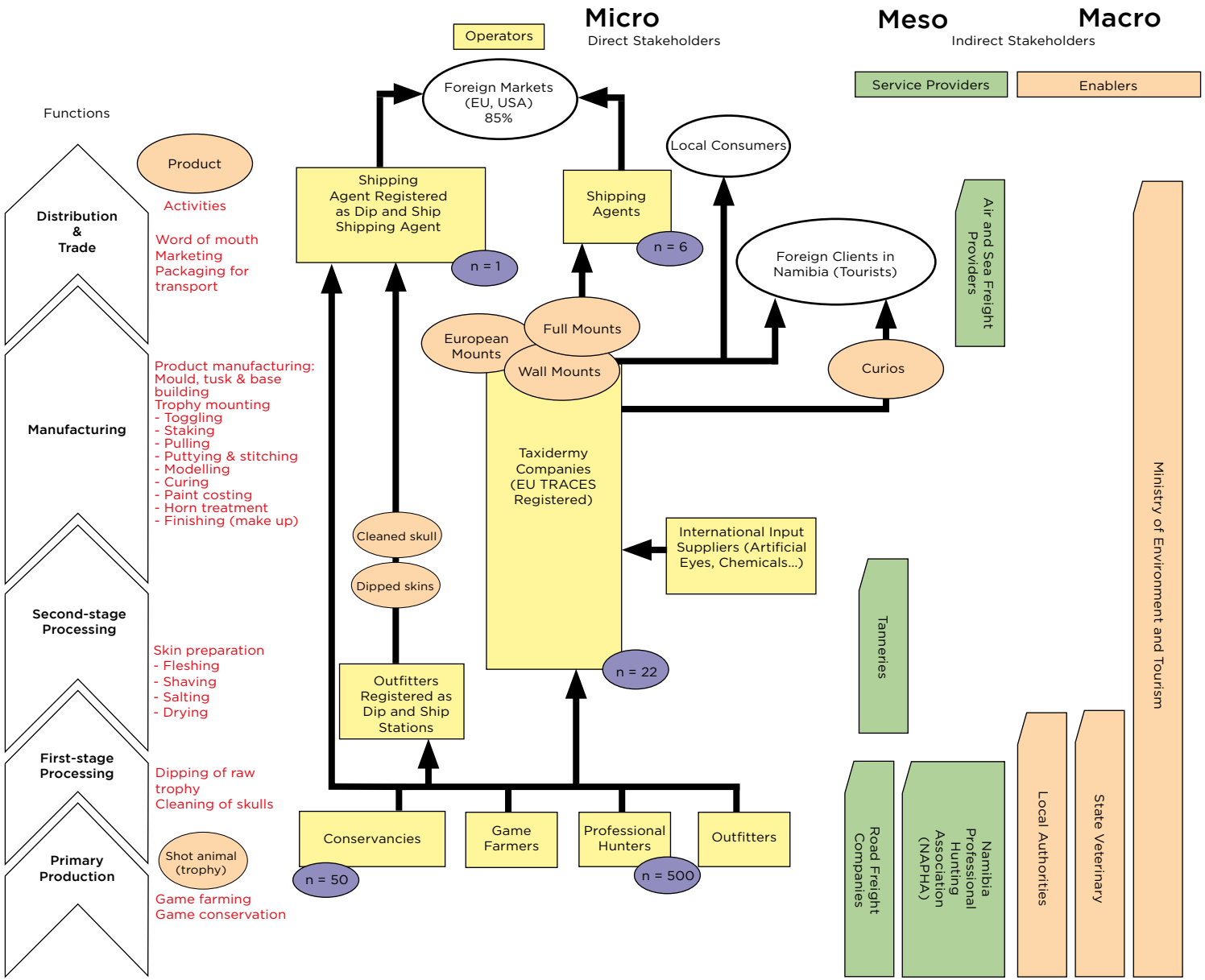

Figure 2: Value chain map taxidermy
Source: GIZ ProCOM, based on Optimal Agricultural Business Systems (OABS)

The longevity and perishability of Namibian taxidermy products are very good. They normally last a lifetime.

1.5 Classification of Namibian Products

The Namibian taxidermy industry generally produces either raw, unprocessed products:

- cleaned skull
- raw skins for dip and ship (to be processed by a foreign taxidermist)
- tanned skins

or finished, processed products:

- full mounts
- all kinds of wall mounts (shoulder, half and offset mounts)
- skull on shield mounts (European mounts)
- huntable bird mounts
- curios and other miscellaneous products.

About 95% of trophy hunting is for the export market and 5% of hunting is from local meat hunters. The most common species for trophy hunting are oryx, kudu, springbuck and warthog, and the most common mounts are shoulder mounts and skull on shield (European mounts). The Namibian trophy-hunting season runs from the 1st of February to the 30th of November. On average, there are four months with low frequency and April to September is the high frequency peak.

The dip and ship procedure, also called dip and pack or just dipping, is a veterinary-regulated process with the aim of killing all pathogens and diseases in order to render raw trophies safe for export. For export from Namibia to the EU, the USA and most other countries, raw material is required to undergo this process. Dipped trophies are still considered raw trophies; no tanning of the hides has taken place to preserve them. This means that the hides will still deteriorate if left for a long time or if they get wet after the process. The aim of dipping is simply to make sure that the trophies are safe for export with regards to disease control. For this reason, the facility doing the process can offer no guarantee on dipped trophies. No insurance will cover the trophies for damage due to hair loss or deterioration because of bacterial damage, so the client runs the risk of the hides arriving at their taxidermist in unusable condition without recourse for this damage.

On the other hand, a hunter client can choose to have his trophy processed by a Namibian taxidermist. To mount a trophy, the individual taxidermist applies his or her skills and expertise to process the raw product into a custom-made finished product. Taxidermists must adhere to very strict conditions in order to export trophies (EU TRACES system). The trophies must be completely dried, hygienic, bleached and professionally treated. Normally, a taxidermist will do the final cleaning and dressing of the trophy and deliver it to a shipping agent, who will pack it and ship it out to the hunter. In some instances, the packing takes place at the taxidermy premises. The total time for cleaning, drying, processing and transport of trophies, depending on the specific taxidermy product, is approximately three to 12 months. As an example, shoulder and full mounts require a nine- to 12-month time frame. Tannery time for animals like ostrich and elephant can take over a year. The longevity and perishability of Namibian taxidermy products are very good. They normally last a lifetime, depending on the way the client handles and takes care of the product, but trophy and skin quality play a very big role in the lifespan of the product.

1.6 Local Industry Performance

Wildlife in Namibia is typically marketed in different ways, each varying by land use and demonstrating high potential for sustainability. Trophy hunting is mainly practiced on freehold land and in selected communal conservancies, and it accounts for 19% of wildlife's direct contribution to the GNP (Barnes et al., 2009).

In 2004, national wildlife assets were estimated to be worth NAD 10.5 billion and to have contributed NAD 700 million to the country's GNP, amounting to an overall 2.5% of GNP (UNEP, 2012). This overall sum is derived

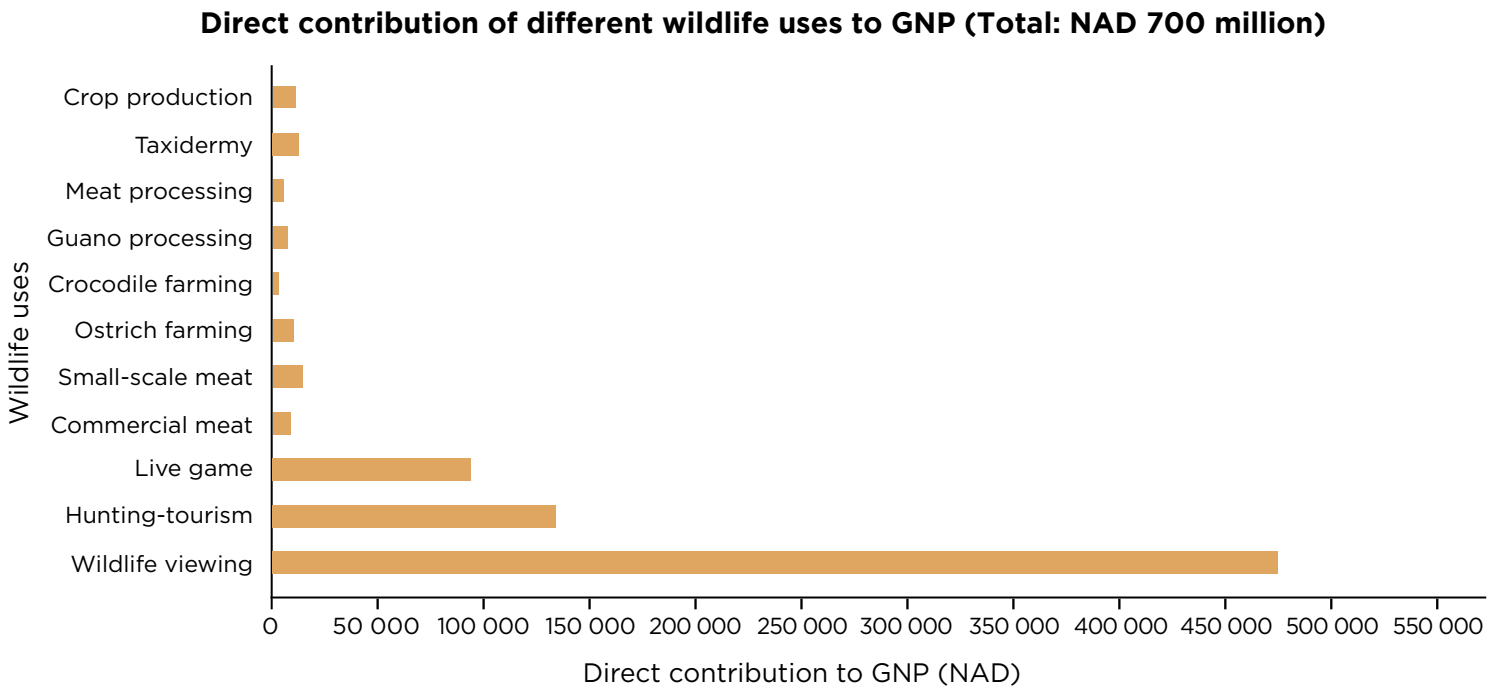

Figure 3: Direct contribution of different wildlife uses to GNP (2004, in NAD)
Source: Barnes et al., 2009

from non-consumptive viewing tourism, trophy hunting, farming and the sale of live game and meat (see Figure 3. The above figure indicates that the actual contribution of the taxidermy industry to the GNP is around NAD 12 million per year. In comparison, the primary economic activity related to it (hunting tourism) accounts for almost NAD 135 million. This indicates that primary production seems to be much more relevant economically than further processing and manufacturing activities.

Estimated figures for trophy animals hunted in Namibia derived from Ministry of Environment and Tourism statistics through the number of permits issued from 2011 to 2014 are shown in Table 3. However, it must be noted that these estimates are no indication of the real volumes and numbers of taxidermy products that have gone through taxidermy companies in Namibia, processed (mounted) or unprocessed (dip and ship). The reason for this is the unavailability of exact numbers of trophies processed formally every year.

On average, around 25,000 animals were shot with trophy-hunting permits between 2011 and 2014, and no real growing or declining trend can be identified. A look at Namibia's global export volume of taxidermy products confirms this consistent development (see Figure 4).

To add to the publicly available data, industry stakeholders were questioned about their impressions of the taxidermy sector. One finding regarding market share and market growth rates was a huge decline in trophy hunting in 2008 and another in 2014, but the general perceived

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Table 3: Number of animals shot with trophy-hunting permits (2011–2014)

Year	2011	2012	2013	2014
Number of animals shot	25 964	27 559	26 654	26 684

Source: MET

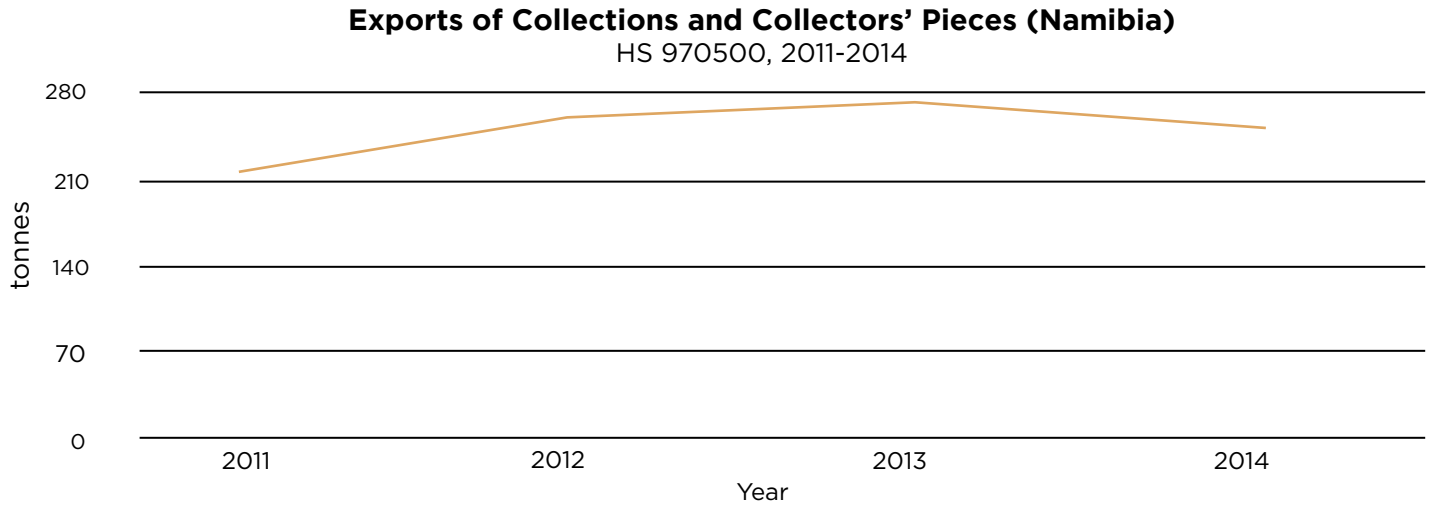


Figure 4: Global exports of Namibian collections and collectors' pieces, code 970500 (in tonnes, 2011–2014)
Source: ITC calculations based on UN Comtrade statistics

trend was of a steady climb since 2008, though current figures have not yet recovered to the pre-2008 level. Another finding was that industry stakeholders believe that 85% of all taxidermy products are sold to foreign hunters, about 8% to local farmers and South Africans, about 5% for home décor and a small number to museums.

Stakeholders estimated the number of staff permanently employed in the taxidermy industry to be around 280 at the end of 2015. On average, 25 job opportunities would be created for every 2,000 trophies going through a taxidermy production line. During personal stakeholder interviews, it was estimated that, on average, only 12% of the total taxidermy workforce are responsible for dip and ship products and 88% of the workforce are responsible for the processing of trophies and value addition into different mounts. Processing the primary product into a final mount is a very labour-intensive and hands-on procedure which can't be replaced by machinery. Hence, decreasing the use of the dip and ship method would lead to more employment.

In order to illustrate the impact of using primarily the dip and ship method in the industry, a comparison has been made between three possible products when processing small game like kudu or oryx (see Table 4). According to this calculation, 80% of possible revenue is lost due to processors dipping and packing a trophy and exporting it for further processing outside of Namibia instead of doing a shoulder mount and adding value locally.

Table 4: Average cost prices (NAD) of shoulder mounts, dip and pack, skull on shield of an oryx/kudu incl. a 30% profit margin

Average cost prices of Shoulder Mounts vs Dip & Pack vs Skull on Shield					
		Number of employees	Percentage of cost	Amount	Total Mark-up=30%
Shoulder mounts	Rotting Cleaning	1	8%	N$ 520	
	Fleshing, Tanning, Molding	3	39%	N$ 2535	
	Mounting Finishing	2	38%	N$ 2470	
	Packing Office	2	15%	N$ 975	N$8450
Dip & Pack	Rotting Cleaning	1	35%	N$446	
	Packing Office	2	65%	N$ 750	N$1625
Skull on shield	Rotting Cleaning	1	20%	N$ 440	
	Skull Mounting	1	45%	N$ 990	
	Packing Office	2	35%	N$ 770	N$ 2860

Source: Own calculations of Optimal Agricultural Business Systems (OABS)

1.7 Global and Regional Demand for Products of the Industry

Globally, the value of imports of products classified under code 970500 has been increasing from 2010. As can be seen from the following figure, the value more than doubled within one year (2014–2015), although no conclusive reason could be identified for this growth. There is no indication of how much the taxidermy industry benefited from this upsurge.

During the last decade, the two most important countries for Namibia concerning imports of products covered by code 970500 were Germany and the USA (see Figure 6). This is consistent with feedback from industry stakeholders, who mentioned these countries during interviews as the countries of origin of their main clientele. Between 2006 and 2014, exports to these countries showed some volatility. The relatively long decrease in export values between 2009 and 2013 could be attributable to the global financial crisis of 2008. Hunters could have decided to delay expensive overseas trips due to the challenging economic situations in their home countries. However, there seems to be a recovery in export values evident from 2013. Three other European countries (Austria, France, Denmark) make up the remainder of the five biggest trading partners, and their imports stayed relatively stable throughout the time period under consideration.

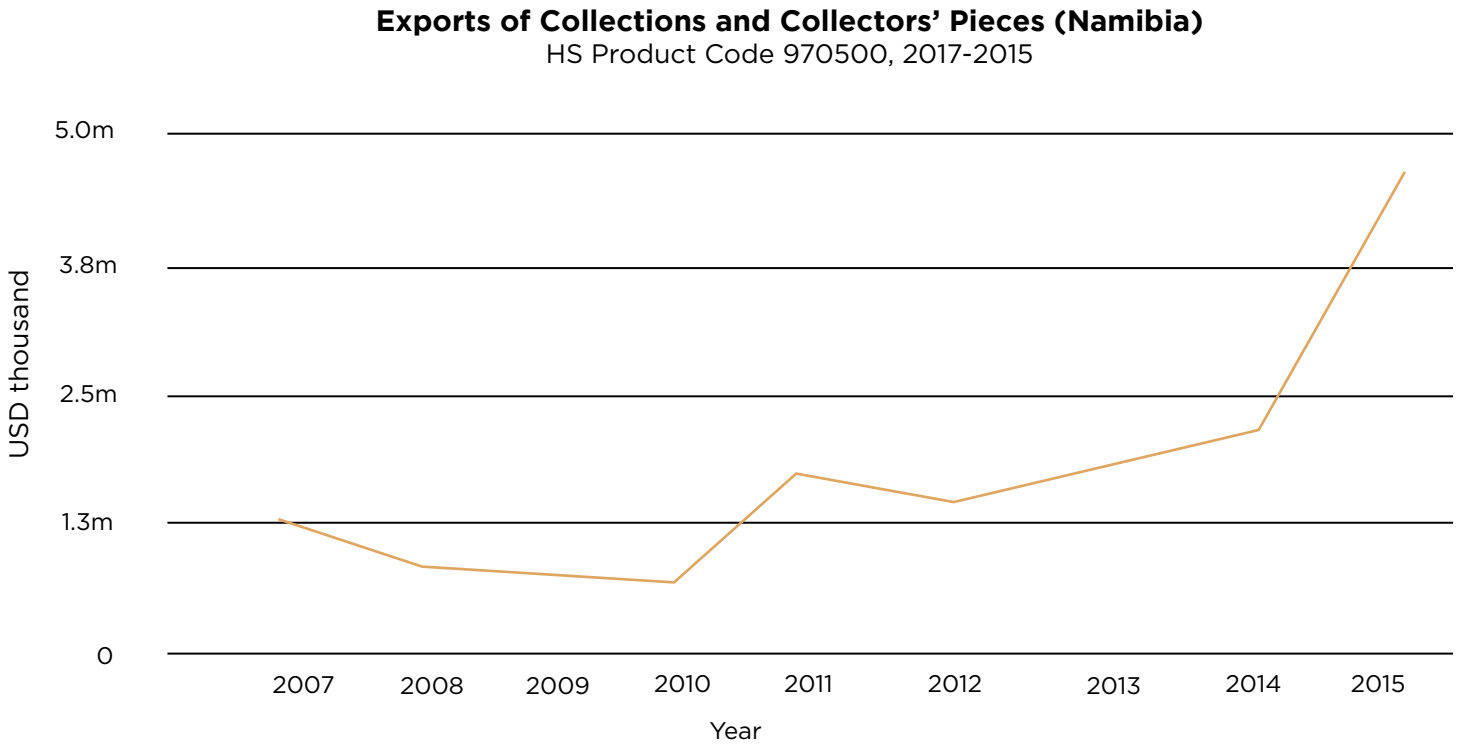


Figure 5: Global value of code 970500 imports (in USD, 2007–2015)
Source: ITC calculations based on UN Comtrade data

On a global scale, Namibia exports about 50% of its products covered by code 970500 to only two countries, which poses a dependency challenge. On the other hand, export values could be improved considerably simply by implementing interventions to reduce the use of the dip and ship method by German and North American hunters.

Demand on a regional level for Namibian taxidermy products is dominated by South Africa (see Figure 7). Although its imports are fairly small compared to those of European trading-partner countries, South Africa remains Namibia's most important regional partner. This can be attributed to the overall close cooperation between the countries for most trade activities, as well as to the general fact that South Africans regularly visit Namibia as tourists and some of these are hunters.

Interviews with industry stakeholders also confirmed that about 95% of trophy hunters originate from overseas and 5% are Namibian or South African.

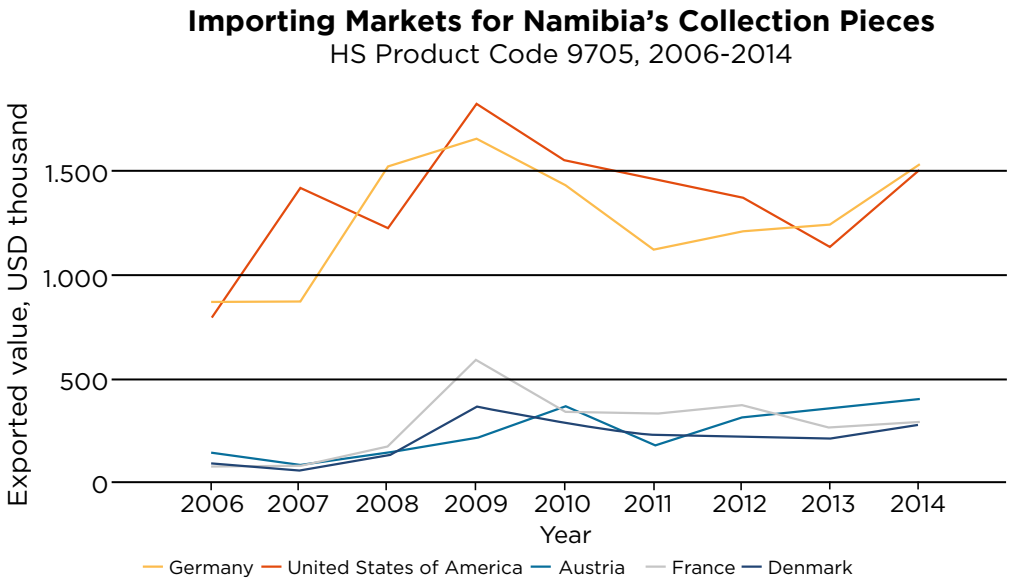


Figure 6: Import markets for Namibian product code 9705 (in USD, 2006–2014)
Source: ITC calculations based on UN Comtrade data

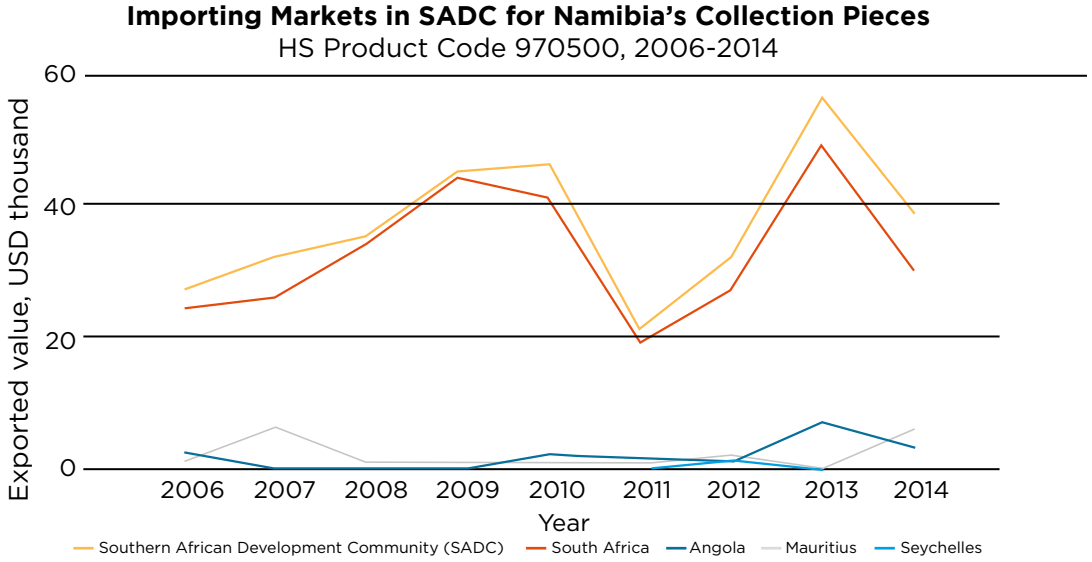


Figure 7: Import markets in SADC for Namibian product code 970500 (in USD, 2006–2014)
Source: ITC calculations based on UN Comtrade data

2. IDENTIFIED OPPORTUNITIES FOR AND CONSTRAINTS TO INDUSTRY GROWTH

2. IDENTIFIED OPPORTUNITIES FOR AND CONSTRAINTS TO INDUSTRY GROWTH

The following chapter elaborates the opportunities for and constraints to the Namibian taxidermy industry as determined during stakeholder consultations. Based on these findings, an industry growth strategy will be defined in the last chapter.

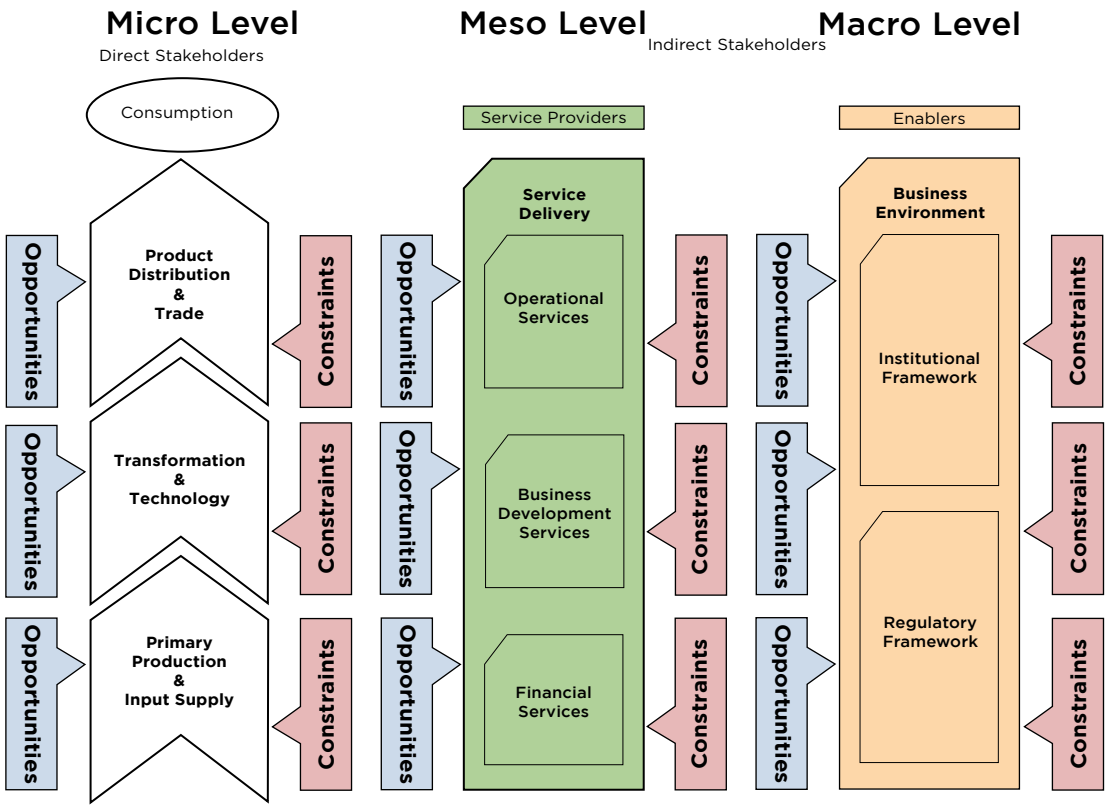


Figure 8: Analytical framework developed for detecting opportunities and constraints
Source: GIZ ProCOM

Namibia is one of the leading African countries when it comes to nature conservation efforts. Since the 1960s, the number of animals in Namibia as well as their diversity has doubled.

2.1 Primary Production and Input Supply

The taxidermy industry relies heavily on hunting for their primary produce. However, only limited information on the industry and their primary activities (trophy hunting), including their contribution to the Namibian economy, is available.

According to the NAPHA, Namibia is one of the leading African countries when it comes to nature conservation efforts. Since the 1960s, the number of animals in Namibia as well as their diversity has doubled. Nowadays, 70–80% of the country's wild animals are found on private land, and this can be largely credited to the trophy-hunting industry (NAPHA, 2016). Statistics show that the introduction of trophy hunting was one of the most successful wildlife-conservation initiatives in Namibia. Trophy hunting has since developed into an extremely lucrative form of land utilisation as well as a most effective wildlife-management tool.

Because of the expansion of trophy hunting and ecotourism, the economic output of wildlife on freehold land is approaching that of livestock, despite veterinary policies that favour livestock and that markedly reduce potential returns from wildlife-based land use (WBLU). WBLU is likely to be less affected by climate change than livestock farming, meaning that the expected continued future growth in tourist and hunter numbers can be accommodated without jeopardising the sustainability of the industry (Lindsay, 2011). In general, the industry is also more popular among younger farmers, who make it more innovative and dynamic.

However, trophy hunting's direct contribution to the GNP is considered low compared to that of non-consumptive wildlife-viewing tourism (19% vs. 62.5% of wildlife's direct contribution to GNP; see Figure 3) and is regarded to have lower direct employment and multiplier effects for other economic sectors (e.g. arts, crafts and other goods; sale of live game; sale and processing of game meat) than non-consumptive wildlife viewing. Although the contribution of wildlife-related economic activities is expected to triple in the next 30 years, if the established trends continue, tourism, which is mostly nature based, represents the most significant proportion of these estimates[3]. Nonetheless, because of the expected growth in overall tourism numbers as well as potential further increase in wildlife figures over the coming years, it can be assumed that this will positively affect the taxidermy industry too.

Concerning input supplies, Namibian taxidermists rely on imports from South Africa, the USA and the EU. The only locally sourced product is the salt used for unprocessed skins. In some cases, this dependency can pose a challenge for taxidermy companies, for example if they need to stock additional products to ensure timely delivery of final products to their customers.

2.2 Transformation and Technology

The local trophy-hunting season is regulated to run from 1st February to 30th November each year. Transactions happen seasonally, with an average of four months of low frequency and a high-frequency period between April and September.

Namibia has no official regulations for hunters regarding processing a shot trophy. Instead, a hunter can choose to have his basic processed trophy and skins exported to his preferred taxidermist through the dip and ship method. In this case, the foreign taxidermist, usually located in the hunter's country of origin, will add value by processing the trophy into the final end product. There are no official numbers available concerning the total number of animals per annum going through basic processing (dip and ship) compared to advanced processing and manufacturing of final products (mounts). It is estimated that 90% of hunted animals (approx. 22,500) enter the value

[3] The overall number of tourists has increased from approximately 200,000 in 1990 to close to 1 million in 2009. The Tourism Satellite Accounts of 2010 estimate the contribution of the tourism industry to be as high as 13% of Namibia's GDP (WTTC, 2010). Its relevance for the Namibian economy is further illustrated by its contribution to total employment (about 17%) and to foreign exchange earnings (12%) (UNEP, 2012).

chain each year. However, the perception of the taxidermists who were interviewed is that the use of the dip and ship method has significantly increased in recent years, to up to 60% of all trophies exported. The growth of dip and ship in Namibia is considered the major bottleneck to the expansion of the taxidermy industry. Hence, the main opportunity identified by industry stakeholders is a raise of the percentage of hunted animals receiving final processing locally. According to interview findings, this is also perceived as one of the best ways to save transport costs for the hunters. In addition, local taxidermists possess the necessary skills and experience to produce a high-quality African-game end product, which is not always the case with foreign taxidermists due to a lack of practice.

Because there are no reliable statistics with data for taxidermy products and their value, the following assumptions were made:

- 25,000 animals are shot with trophy permits per year
- 90% of these animals reach a local taxidermist (22,500)
- 22,500 animals are assumed to be kudu or oryx (for calculation purposes)
- 25 job opportunities exist for every 2,000 tro phies passing through a taxidermy production line
- The value of a kudu or oryx shoulder mount is NAD 8,450
- The value of a kudu or oryx dip and ship product is NAD 1,625

The following table gives a brief overview of the estimated expected growth in value (in NAD) of taxidermy product sales and the increase in number of workers employed in the industry. This will be applicable if selected interventions are successful, with a special focus on decreasing the dip and ship method to 20% of total taxidermy products exported.

Table 5: Estimated value in NAD and number of jobs potentially created from implementing certain interventions (2016–2020)

	Year				
Indicator	**2016**	**2017**	**2018**	**2019**	**2020**
Estimated value of taxidermy product sales from processing trophies (N$)	39 195 000	56 671 875	77 220 000	100 839 375	127 530 000
Estimated value of taxidermy product sales from dip and ship (N$)	58 792 500	56 671 875	51 480 000	43 216 875	31 882 500
Total estimated value of taxidermy product sales (N$)	**97 987 500**	**113 343 750**	**128 700 000**	**144 056 250**	**159 412 500**
Amount of trophies for dip and ship	13 500	11 250	9 000	6 750	4 500
Amount of trophies for processing	9 000	11 250	13 500	15 750	18 000
Percentage of all taxidermy products processed in Namibia before export	40%	50%	60%	70%	80%
Percentage of all taxidermy products exported via dip and ship method	60%	50%	40%	30%	20%
Total estimated number of jobs from taxidermy	**281**	**338**	**394**	**450**	**506**

Source: Own calculations of Optimal Agricultural Business Systems (OABS)

IDENTIFIED OPPRTUNITIES FOR AND CONSTRAINTS TO INDUSTRY GROWTH

The growth target for 2020 is to process at least 80% of all taxidermy trophies within Namibia. It is estimated that the total value of Namibian taxidermy products could reach about NAD 160 million by 2020 (in 2015 NAD value). It is also estimated that if certain interventions are implemented, at least 506 jobs will be created through local trophy processing by 2020.

2.3 Marketing and Trade

In general, there is a trust relationship between taxidermists, outfitters, professional hunters and the hunters of the trophy animals, as they are dealing with a biological product with which a variety of issues can arise, especially during the early stages after the animal has been shot. The usual means of communication is by telephone, as e-mail facilities are often unavailable in remote areas. Frequency of personal contact is minimal due to the great distances between buyer and supplier. Therefore, relationships of trust are key to enabling the business transactions.

Marketing in this value chain is mainly done by the professional hunters and the outfitters. Taxidermy companies normally do not travel abroad to promote their businesses at trade shows or in international competitions. Instead, they make use of magazines, websites and word of mouth via previous hunters who employed their services. Taxidermists see their final products as their key method of marketing to showcase what they can do. This creates a challenge for taxidermy companies, as they are dependent on other value-chain actors and this limits their growth potential, amongst other considerations.

As a first step, an overall marketing and branding strategy for the industry could be designed and implemented on an international level. There should be a strong focus on the quality and skill levels of Namibian taxidermists, which must be to the same standard as foreign taxidermists in order to compete with them. Second, local taxidermists should participate at international trade fairs and competitions to actively promote their services. If required, suitable training by experts on how to market a business successfully at a trade fair or ways to take part in a competition could be provided.

The stakeholder perception during interviews was that the dip and ship method has significantly increased over time to between 50% and 60% of all taxidermy products leaving Namibia. Because of the taxidermy industry's strong dependency on trophy hunting, demand for processed goods and services is volatile. There is also a high concentration of products, clients and distribution channels. A stronger focus on marketing the services of local taxidermists and enabling them to participate successfully at trade fairs and competitions could contribute significantly to a decrease in the use of dip and ship. The increased visibility of Namibian taxidermists on an international level will also help the companies become more independent from other stakeholders in the value chain.

Local taxidermists have mainly focused so far on certain 'standard' products, like shoulder mounts or European mounts, thus limiting their growth potential and contributing to competition between themselves and international taxidermists. Instead, new opportunities should be explored in the curio and handicraft areas focusing on 'non-hunting' tourists who visit Namibia. Another option could be high-value home décor products for overseas markets like the United States focusing on customers not interested in traditional trophies but in stylish, modern decorative objects made of natural resources. These would require completely new marketing efforts by local taxidermists to position themselves with different audiences.

2.4 Service Delivery

One of the major bottlenecks in the taxidermy value chain is the retrieving of unprocessed raw trophies from north of the Red Line (veterinary cordon fence – VCF) and the insufficient infrastructure to handle the unprocessed trophies. Currently, the quarantine infrastructure

is not in close proximity to the state veterinarians who need to inspect and seal consignments before they can be transported south of the Red Line to be processed at different taxidermy premises. When there is a foot-and-mouth disease (FMD) outbreak, no unprocessed trophies can be transported, even if they have been sealed in the quarantine facilities by a state veterinarian. This is a considerable problem for taxidermists and eventually their hunter clients, due to the extension of delivery times. To overcome this challenge, one possible solution could be the construction of sufficient quarantine facilities. Ideally, these should be located closer to the product supply, thus easing input sourcing. Improved planning of the logistics infrastructure usage will reduce bottlenecks and delays and allow a faster flow of products through the value chain. In addition, better infrastructure utilisation will result in lower transaction costs and therefore in increased competitiveness for the taxidermy industry. Any improvement in the competitiveness of the industry will play an important role in economic growth and job creation on a regional and national level through positive multiplier effects.

Taxidermy in general is a knowledge-, skill- and labour-intensive industry. Most of the expertise in the local sector is experience and know-how that has been passed from one generation to another. In Namibia, not many employees in the taxidermy industry have tertiary education, making these skills rare within the sector. In order to fill knowledge gaps, taxidermists use magazines and the Internet to educate themselves about techniques and technologies used in other countries. A good taxidermist needs to develop awareness for this specialist craft art, and a certain degree of skill and precision will be achieved only over time and through practice. The industry stakeholders recommended support for basic vocational training in Namibia for newcomers to the field to obtain the technical and creative skill set required to become a taxidermist. Students who pass certification for this training could afterwards be placed with taxidermy companies to receive additional practical in-house training. Certain marginalised groups of society could be empowered to participate in and benefit from this industry. This would elevate the skill-related competitive advantage of the Namibian taxidermy industry, which in turn is crucial to encouraging foreign hunting clients to process their trophies locally.

Another initiative that was strongly recommended by taxidermy companies was to design and conduct a skill development program for on-farm trophy preparation. The reason for this is the high dependency of the final processed product on the quality of on-farm trophy preparation. If mistakes are made during the skinning and caring process for the hide of an animal immediately after the hunt, this will strongly affect the condition of the end product. Through short courses on best-practice trophy preparation, the condition of the raw unprocessed product handed over to the taxidermist could be improved, allowing him in turn to deliver a high-quality finished processed product.

Overall, these skill development efforts will also reduce usage of the dip and ship method, as they will reassure foreign hunters as well as local outfitters and PHs that high-quality processed taxidermy can be done locally.

The industry faces specific research needs that are currently not addressed. More knowledge of how to deal with effluent water and chemical waste and better methods of recycling is needed, potentially along with support and implementation of state-of-the-art recommendations. Furthermore, there is a need to conduct research on the 31-day period which is standard for raw unprocessed primary products in quarantine facilities. It was suggested to take samples of raw primary products to identify the amount of time that they are susceptible to foot-and-mouth disease, as time delays are a significant challenge to growth in the industry. In addition, alternative ways of transporting unprocessed products through FMD outbreak areas could be investigated.

Within the industry, the costs of introducing new technology and being compliant with all aspects of the EU TRACES system are high. It is extremely difficult to obtain funds for equipment and any capital investments in

The objective is to improve capacity for value-added processed taxidermy product exports through better access to capital funds and the efficient coordination of all current and future logistic and infrastructure interventions.

IDENTIFIED OPPRTUNITIES FOR AND CONSTRAINTS TO INDUSTRY GROWTH

the Namibian taxidermy value chain, as banks are reluctant to provide these funds. Hence, the objective is to improve capacity for value-added processed taxidermy product exports through better access to capital funds and the efficient coordination of all current and future logistic and infrastructure interventions.

2.5 Business environment

Regarding the taxidermy value chain, there are rules, regulations and standards for all stakeholders to comply with the EU TRACES system. These compliance regulations are monitored by the Ministry of Environment and Tourism, state veterinary services and local municipalities. However, due to lack of capacity, compliance regulations are not applied uniformly across the taxidermy value chain.

In comparison to many other countries with established taxidermy industries, in Namibia there is no independent industry body to represent the sector. This lack of effective communication between government and the private sector also hampers growth in the value chain.

Taxidermy companies work mainly in isolation from each other, which hinders their capacity to lobby jointly regarding challenges affecting all stakeholders. Therefore, setting up a taxidermy association to provide up-to-date information, promote the industry on a national and international level, enhance exchange between industry players and lobby on behalf of its members could provide a lasting solution to a variety of challenges the sector is facing. Through the association, the taxidermy industry could also become an effective partner in implementing government policy with an emphasis on the ethical hunting and marketing of Namibian wildlife products.

In general, there is very limited information available on the taxidermy industry and primary production (trophy hunting) and especially their contribution to the Namibian economy. As shown before, there is only one applicable database containing figures on game shot with trophy-hunting permits. At the moment, these permits are issued through a manual filing system by the MET, and there is little indication of how many of these animals were processed or dipped and shipped by taxidermists. Therefore, a central information system capturing industry statistics about value-adding transformation activities in Namibia could support growth in the taxidermy sector and justify public support programmes. This database could be developed and maintained by the taxidermy association.

Current policy and legislation allow dip and ship stations to send unprocessed trophies directly to foreign taxidermists for final mounting if hunter clients request this. This approach results increasingly in hunters circumventing the processing of trophies at Namibian taxidermy companies. To increase local manufacturing, the reasons for this development and ways to minimise the dip and ship method must both be determined.

In addition, rules and regulations regarding the Red Line quarantine procedures for primary products are unclear and implemented inconsistently. There is no policy with specific time frames, which poses a challenge for taxidermists, as this influences the quality of their input resources and as a result the final processed trophies. It also lengthens the overall delivery time for the final taxidermy product.

As an initial step, clear policies need to be developed, and it must be ensured that current policies are implemented uniformly by all veterinarians. Industry stakeholders who were interviewed expressed the need for veterinarians exclusive to their industry as a way to secure consistent application and interpretation of rules and regulations. The discontent between the different role players was mentioned as a considerable frustration point.

Another bottleneck for the industry is the Nature Conservation Ordinance of 1975. The document is considered outdated and in need of a revision with regards to taxidermy. Stakeholders are of the opinion that a consensus should be found to propose amendments to the ordinance to ease operations within the sector.

3. INDUSTRY GROWTH STRATEGY

3. INDUSTRY GROWTH STRATEGY

3.1 Vision of Industry Stakeholders

"By 2020, at least 80% (approximately 20,000 animals per annum) of all trophies will be processed in Namibia."

3.2 Industry Growth Indicators and Targets

- Increase taxidermy industry's total product sales by 2020
  (Base 2016: NAD 98 million; Target 2020: NAD 160 million; Data source: Export statistics)
- Increase permanent employment in the industry by 2020
  (Base 2016: 281; Target 2020: 506; Data source: TBD)

3.3 Strategic Objectives, Indicators and Proposed Interventions

The stakeholders identified 3 core intervention areas as follows:

Intervention Area 1: Product Distribution and Trade	**Intervention Area 2:** Service Delivery	**Intervention Area 3:** Business Environment

Intervention Area 1: Product Distribution and Trade

Strategic Objective 1:

"Position the Namibian taxidermy industry as the preferred service provider for processing hunting trophies, and minimise dip and ship exports through successful marketing initiatives."

Indicators and Targets:

- Decrease dip and ship exports from 60% to 20% between 2016 and 2020 (Base 2016: 60%; Target 2020: 20%; Data source: TBD)
- Increase share of high-value home décor products exported by X% by 2020 (Base 2016: 0; Target 2020: TBD; Data source: TBD)
- Increase overall value of sales of exported processed taxidermy products (Base 2016: TBD; Target 2020: TBD; Data source: Export statistics)

Proposed Interventions:

Support to developing an international marketing and branding strategy

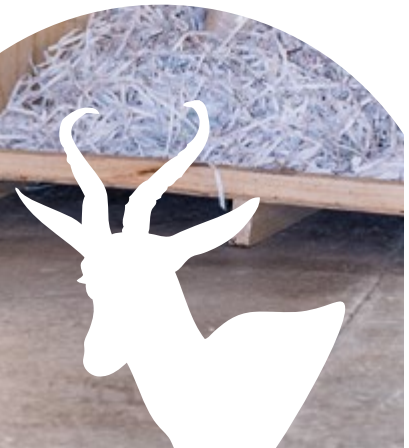
Key activities:

- Identify the unique selling proposition of the Namibian taxidermy industry and develop a relevant overall strategy (focus on quality and skill level)
- Facilitate the launch of the marketing and branding strategy in collaboration with industry stakeholders
- Present the industry in a cohesive way on an international level (e.g. via a website) showcasing the high quality and skills of Namibian taxidermists

Support to participation at international trade fairs and competitions

Key activities:

- Identify suitable companies for participation
- Enable companies as needed to successfully present themselves at international events (e.g. training on ways to market at a trade fair)
- Contract a taxidermy expert on a short-term basis (ideally a former judge) who can guide and train the industry on ways to successfully participate in international competitions
- Provide financial support if needed (e.g. via MITSMED's International Trade Programme)



Investigate opportunities for accessing new markets for high-value home décor products

Key activities:

- Identify possible new markets for high-value home décor products (market research)
- Disseminate the market research findings to taxidermy companies
- Support the companies entering new markets as needed (e.g. finding overseas wholesalers)

Intervention Area 2: Service Delivery

Strategic Objective 2:

"Improve access to funding, enhance skills development and reduce current lead times with improved logistical systems and infrastructure."

Indicators and Targets:

- Increase number of companies benefiting from improved access to funding by X
  (Base 2016: TBD; Target 2020: TBD; Data source: Survey)
- Grow percentage of employees who have received formal vocational training by X% by 2020
  (Base 2016: 0; Target 2020: TBD; Data source: NTA)
- Increase number of people trained in high-quality on-farm trophy preparation skills to X by 2020
  (Base 2016: 0; Target 2020: TBD; Data source: TBD)
- Grow number of stakeholders who are implementing research findings by X% in 2020
  (Base 2016: 0; Target 2020: TBD; Data source: Survey)
- Erect X additional quarantine facilities north of the veterinary cordon fence by 2020
  (Base 2016: 0; Target 2020: TBD; Data Source: MET)

Proposed Interventions:

Support to design and implementation of an NTA-accredited vocational training course

Key Activities:

- Design, develop and implement a vocational training course
- Ensure close cooperation between taxidermy companies and the vocational training institution to develop training that meets the specific needs of the sector
- Provide support as needed to implement the training and seek ways to market the new offer to potential employees

Support to develop a specialised short course on on-farm trophy preparation skills

Key Activities:

- Design, develop and implement a short course focusing on on-farm trophy preparation skills
- Cooperate closely with relevant industry stakeholders about best practices
- Provide support to implement the course at training institutions and ways to incentivise employees to participate

Review existing investment support opportunities and support companies as needed

Key Activities:

- Map existing investment support opportunities and incentives
- Cooperate with taxidermy companies to determine their unique funding needs and ways to tailor existing investment tools to their specific requirements
- Disseminate existing investment offerings and support industry stakeholders in accessing funding as needed

Support to research into industry-specific topics and techniques

Key Activities:

- Conduct research into:
  - alternative solutions to effluent water and chemical waste
  - quarantine period of 31 days

- different ways to transport unprocessed taxidermy products through foot-and-mouth disease outbreak areas
- Benchmark effluent water and chemical waste techniques with existing solutions (e.g. in other sectors) to determine best practices, possible gains and cost-saving techniques
- Disseminate relevant findings throughout the industry and support measures to mitigate any constraints

Feasibility study, design and building of additional quarantine facilities

Key Activities:

- Identify a professional service provider to design and conduct a feasibility study for additional quarantine facilities in the north
- Assure close cooperation with the MET at all times
- Implement recommendations and erect facilities as needed

Identify needs of SMEs in the value chain and assist if required

Key Activities:

- Determine specific needs of SMEs within the value chain by conducting a survey
- Carry out interventions and arrange ongoing mentorship according to their requirements

Intervention Area 3: Business Environment

Strategic Objective 3:

"Organise and formalise the taxidermy industry by implementing applicable standards and practices."

Indicators and Targets:

- Establish an independent, functioning taxidermy industry association serving the needs of its members
  (Base 2016: 0; Target 2020: 1; Data source: Survey)
- Achieve a number of interventions completed successfully by the industry association addressing regulatory and policy-related constraints via PPDs by 2020
  (Base 2016: 0; Target 2020: TBD; Data source: Survey)
- Achieve a number of taxidermy companies which have considerably benefitted from being members of the association by 2020
  (Base 2016: 0; Target 2020: TBD; Data source: MITSMED/MET/Taxidermy industry association)

Proposed Interventions:

Establish a taxidermy association to organise stakeholders effectively

Key Activities:

- Conduct desk research to identify best practices for a taxidermy association
- Support setup of a working association which continuously supports members' needs and promotes the industry
- Introduce a central information system capturing necessary industry data to negotiate more effectively with stakeholders outside the industry

Facilitation of periodic PPDs to resolve regulatory and policy-related constraints

Key Activities:

- Identify industry-specific crucial regulatory and policy-related issues in cooperation with stakeholders
- Set up PPDs and encourage participation and communication
- Encourage stakeholders to use these structures as effective tools to solve urgent challenges

Revise the Nature Conservation Ordinance of 1975 – focus on taxidermy

Key Activities:

- Lobby with the Ministry of Environment and Tourism to revise the outdated Nature Conservation Ordinance of 1975
- Cooperate closely with industry stakeholders regarding their challenges and communicate findings to the MET regarding taxidermy
- Support research into best practices regarding international procedures and regulations if required

Develop criteria for dip and ship method applied in the value chain

Key Activities:

- Facilitate dialogue between value-chain stakeholders to identify reasons for increased use of dip and ship instead of processing trophies in the country
- Get buy-in from all affected stakeholders to define new criteria
- Support the development of suitable criteria, assist with implementation and enable the taxidermy association to monitor continuously

Establish clearer policies regarding quarantine procedures

Key Activities:

- Facilitate between the MET and stakeholders to develop clear policies regarding quarantine procedures for primary taxidermy products (e.g. time frames)
- Provide support if necessary to regulate and implement current legislation uniformly, for example through training of veterinarians

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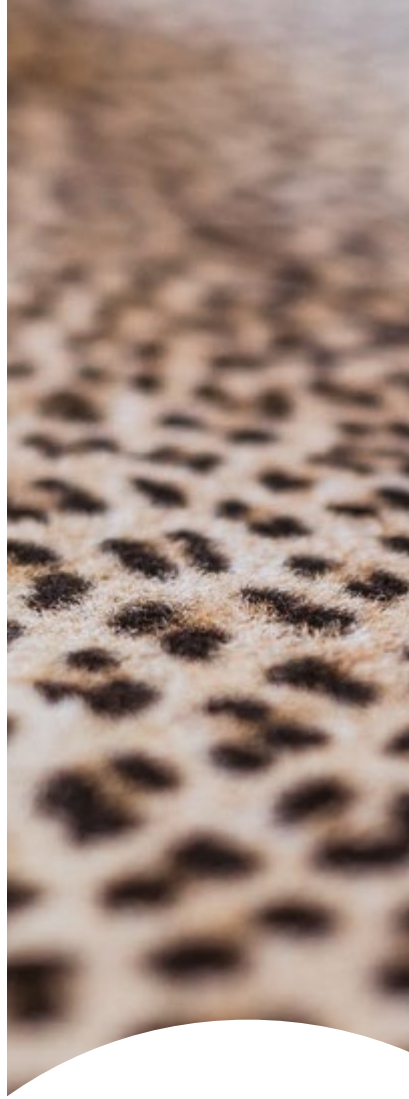

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