

Meat Board of Namibia

External Stakeholder Perception Survey

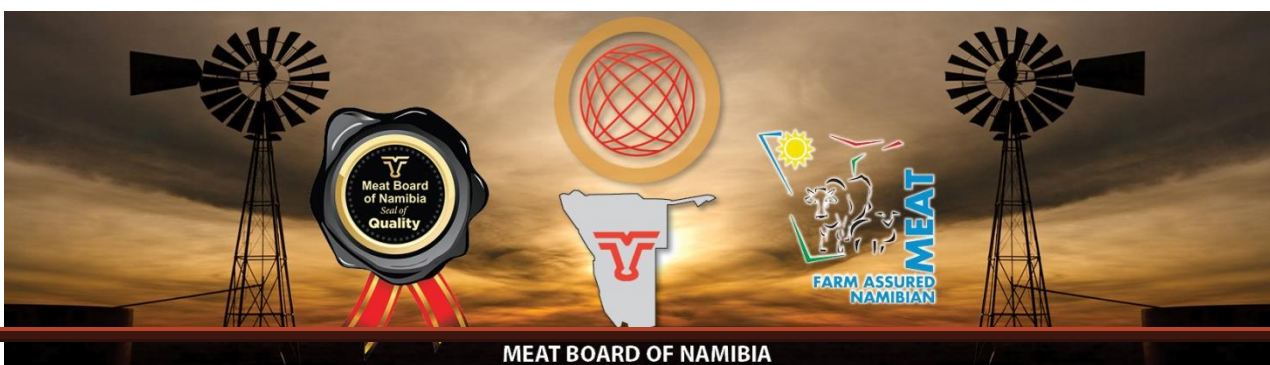
Survey Report

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Submitted by



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MEAT BOARD OF NAMIBIA

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1. INTRODUCTION AND BACKGROUND

The Meat Board of Namibia (MBN), founded in 1935, facilitates the export of livestock, meat and processed meat products to importing countries. All major stakeholders of the Namibian meat industry are represented on the Board. It is adequately equipped to assist the meat and livestock trade with relevant information and technical and administrative support.

The Meat Board expressed the need to embark on a stakeholder perception and corporate reputation study to understand the perceptions and opinions of its board members, producers and other industry stakeholders and what affect the more recent activities and implementations had on the corporate reputation of the Board.

Business Intelligence Africa was contracted to conduct the survey on behalf of the Meat Board.

The MBN realises that the level of satisfaction of its stakeholders will greatly contribute towards achieving its goals and measuring the effectiveness of its recent programmes and included a customer satisfaction component into the study to assess what the stakeholders thought of the service they are receiving from the Meat Board.

Corporate reputation can be defined as a long-term combination of various outsiders' assessments about what the organisation is, how well it meets its commitments and conforms to stakeholders' expectations, and how effectively its overall performance fits with its socio political environment.

2. EXECUTIVE SUMMARY

This report contains the findings of MBN's external stakeholder perception survey and describes the survey methodology, presents its results and recommends actions identified by survey respondents.

Definition and objectives

A stakeholder perception and corporate reputation survey is a questionnaire-based quantitative tool, most often used by organisations to increase their understanding of the knowledge, attitudes, perceptions, interests and experiences of their stakeholders.

Findings are used to make improvements in the delivery of programmes and/or services. Stakeholder surveys can be very helpful in generating critical information required for performance management and for creating and sustaining organisational change.

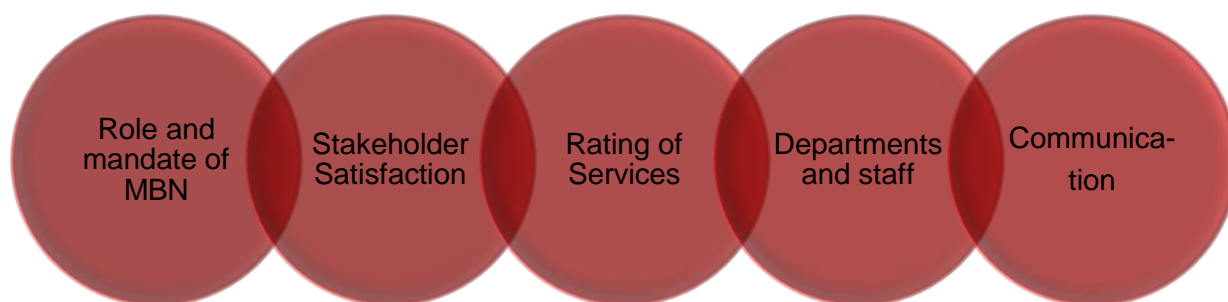
The survey was commissioned to meet the following objectives:

To **measure, clarify** and **identify** the awareness of the functions of MBN, the level of satisfaction of the various stakeholders with the activities and programmes of MBN and to establish reasons for any areas which can contribute to a lower level of satisfaction about MBN.

The study has placed emphasis on major components as follows:

- ♦ To determine level of awareness of MBN's role and functions amongst stakeholders;
- ♦ To gauge the level of understanding by various stakeholder groups about the operations of MBN;
- ♦ To determine the perception on MBN's ability to meet its mandate;
- ♦ To assess stakeholders' level of satisfaction with MBN;
- ♦ To determine expectations of stakeholders of what MBN should focus on;
- ♦ To attain a better understanding of the perceptions MBN is fostering amongst stakeholders;
- ♦ To assess the sufficiency of engagement and communication with the MBN; and
- ♦ To obtain comments from stakeholders on areas where possible improvement is needed.

In order to cover the above aspects, the results are split into the following categories:



♦ **Result analysis**

Most questions were posed as ratings on a scale from 1 to 5. Results are presented either as percentage ratings in frequency tables or as mean index scores.

Scores have the advantage of being weighted where “very good” responses weigh more heavily than “good” or “average” and “very poor” responses weigh the least.

On a rating scale of 1 to 5 points the midpoint is 3 (60%). Generally, we follow the guideline that results with scores of 60% and lower are an indication of customer dissatisfaction, and vice versa. However, it is the prerogative of each company to set their own targets and we would suggest that scores of 70% and above are positive results, between 60% and 69% are average and results below 60% are on the negative side.

The survey probed for a fairly high number of qualitative comments and views and these are provided mostly as verbatim and some are analysed using the concept analysis procedure. This procedure involves categorizing similar responses and identifying similarities and patterns among the responses.

For some of the results, the respondents have been split into 2 categories as follows:

1. Stakeholder type:

	No. of interviews
Board Members	7
General Stakeholders	19
Commercial Farmers	77
Communal Farmers	35
Total	138

2. Main type of farming:

	No. of interviews
Cattle farming	89
Sheep farming	33
Goat farming	5
Crop farming	2
Pig farming	2
No farming activity/consulting	6
Cattle farming - Zero income - herd sold due to drought	1
Total	138

Furthermore, the responses were collected from the following regions:

	Board Member	General Stakeholders	Commercial Farmers	Communal Farmers	Total
Khomas	1	11	15	1	28
Otjozondjupa		1	14	8	23
Hardap	3	1	15	1	20
Karas			17		17
Omaheke	1	3	6	5	15
Ohangwena				10	10
Oshikoto	1		2	3	6
Kunene		1	3	1	5
Kavango East				4	4
Kavango		1		1	2
Omusati				1	1
Erongo			1		1
Not answered	1	1	4		6
Total	7	19	77	35	138

Summarised Findings

It is important to mention that throughout the survey perceptions of respondents were tested and the report is based on the perceptions and views of the respondents which might not in all cases be based on absolute facts.

The most important findings are summarised below; more detailed replies can be seen in the detailed section of this report.

- ♦ The most profound finding throughout the survey is the fact that especially commercial producers tend to be fairly negative about the meat industry as a whole – new markets and a higher demand are needed, prices are too low to cover the operational costs, etc. Farmers/producers are frustrated mainly about the prices of their meat that do not cover operational input costs and limited markets for their livestock.
- ♦ The sheep marketing scheme was criticized as being unproductive for the industry. Too many regulations are in place, which do not contribute towards a free market system.
- ♦ It was found that there is a continuous need for information sharing by the Meat Board. The Meat Board should be more visible and producers are looking for more engagement and support from the Board's management and employees.
- ♦ Generally, producers would want more support from the Meat Board. Communal producers often mentioned that they need some kind of mentoring and assistance. Maintaining animal health is a critical area where communal farmers seem to be lacking knowledge.
- ♦ Some respondents interviewed are of the opinion that the interaction with government might hinder MBN to achieve its vision. The hands of the Board are often tied and they are bound to act according to the decisions and policies of Government. This may result in hindrance to enhance the industry.
- ♦ In terms of the belief whether MBN is achieving its vision, an overall mean score of 62% was achieved. Commercial farmers/producers seem to be most skeptical with a score of 57% compare to the rating from communal farmers which resulted in a score of 67%. The sheep farmers are least convinced that MBN will achieve its vision with a score of 53%.
- ♦ Three indicators were used to assess the level of satisfaction with MBN's service delivery: namely how satisfied customers are with the overall service from MBN; how easy it is to engage with MBN; and how satisfied the stakeholders are with the support that the Meat Board is providing with regard to promoting the meat industry in Namibia.

- ♦ In terms of the overall service delivery, a mean score 77% was received and 74% was achieved when measuring the ease of engaging with MBN.
- ♦ A somewhat lower score (65%) was achieved in terms of the support that respondents are receiving from MBN.
- ♦ In terms of service delivery the commercial farmers and general stakeholders appear to be most skeptical however the communal farmers find it mostly difficult to engage with the MBN resulting in a score of 61%. As a main concern, it was mentioned that the Meat Board is seemingly serving the producers too little but rather focuses on processors and government.
- ♦ Stakeholders rated the following functions within MBN's résumé the lowest: "To assist the industry in the Northern Communal Area (NCA) to increase cattle & beef exports from the NCA" (56%) followed by "to identify opportunities for value addition / business opportunities in the meat industry" (60%).
- ♦ The best rated services which are indicative that respondents are most satisfied with, are: "MBN issuing of import/export permits" (82%) followed by "to assist the Directorate Veterinary Services (DVS) in maintaining Namibia's animal disease status" (80%).
- ♦ "The Meat Board should maintain NamLITS helpdesk" is an important function and should remain, according to 96% of the respondents.
- ♦ 65% of the respondents shared the view that "The Meat Board should be engaged in the selling of bush eradication herbicides ("arboricides")".
- ♦ 50% (55% in the 2017 survey) of the respondents feel that FAN Meat (Farm Assured Namibian meat) sufficiently and efficiently demonstrates the advantages of buying Namibian.
- ♦ Generally, respondents find the staff of MBN friendly, willing to assist and competent resulting in scores of 70% and above for the various departments.
- ♦ 8% (11% in the 2017 survey) of the respondents never feel sufficiently informed by the MBN about the meat industry and future trends etc., 35% sometimes and 36% agreed that they always feel sufficiently informed.
- ♦ 49% of the respondents indicated that they are always satisfied with the level of interaction and commitment of the management team of MBN.
- ♦ 75% (59% in the 2017 survey) of the respondents prefer to have information from MBN communicated to them via email followed by 51% who prefer to receive announcements and information via SMS/WhatsApp. 30% of the respondents would like see an MBN representative on farmers' days.

- ♦ Generally most marketing activities and initiatives have achieved very good scores with the overall average scores ranging between 78% and 88%.
- ♦ Respondents seem to value the SMSes sent on announcements / information sharing the most, which resulted in a score of 88%.

3. COMPARATIVE TRENDS WITH PREVIOUS SURVEYS

BIA conducted similar surveys for the Meat Board in 2015 and 2017 and although some areas questioned differed in each survey, some of the major trends from the surveys can be summarised below as follows:

- ♦ In the current survey, board members were included in the sample which may have contributed to slightly more positive results.
- ♦ Producers are still sharing the view that the demand for meat is not sufficient. More emphasis should be placed on local development and exploring new markets for livestock and meat. It was felt that a free market system is the most appropriate vehicle to lead the meat industry to optimisation.
- ♦ The market for small stock urgently needs to be developed. Farmers are experiencing a lack of marketing opportunities.
- ♦ Government intervention into the mandate of MBN, taking the focus out of their mission is seen as a threat. It is believed that an open market system is the only way to stimulate growth in the meat industry.
- ♦ Generally, the functions of MBN were rated fairly positive by those respondents who are familiar with them.
- ♦ The changing climate is seen as a further threat in the meat industry.
- ♦ Apart from that, it was mentioned that prices are too controlled, too low and do not cover the increasing costs of running a farming operation. Producers expressed a need to review the marketing system in order to increase the demand of meat and meat products.
- ♦ Stakeholders believing in MBN's ability to achieve its vision resulted in a total score of 62% revealing some doubts in whether MBN is currently achieving its mission. The score in the survey conducted in 2017 for the same question was 57%.
- ♦ In the current survey, a score of 77% was achieved when rating the level of satisfaction with the overall service delivery of MBN compared to 59% and 61% in the surveys of 2015 and 2017 respectively.

- ◆ Similar as in the previous survey, email was again chosen as the preferred medium to share information. However, in the current survey the SMSes and WhatsApps that MBN use to share some announcements and information were appreciated much more.
- ◆ Throughout the survey it can be interpreted that some communication interventions have taken place since the previous survey, as a substantially higher number of stakeholders were able to provide answers or ratings to various questions compared to the previous surveys. However on some issues, there still seems to be a lack of clarity to what the mandate and functions of the Meat Board is and therefore it is possible that the Meat Board is blamed on issues which do not fall within their mandate. Especially amongst the communal producers there still seems to be some confusion between the mandate of the Meat Board and Meatco.
- ◆ Due to the above, it is still important that continuous interaction and engagement is required, and the Meat Board still becomes more visible to producers. Increased information sharing would instil trust in MBN.

4. METHODOLOGY

As survey tool a questionnaire was designed to suit the different stakeholder groups.

In the questionnaire a mix of quantitative and qualitative approach was used to ensure that the reasons behind the closed-ended questions (quantitative) were fully explored. The qualitative approach was especially appropriate in cases where more in-depth exploration of “*why*” questions was required. It set the context for more elaboration and description of answers from the respondents on quantitative answers given.

Special care was taken to firstly include all necessary and vital information and secondly to keep the questionnaire as short as possible as our experience shows that unnecessary lengthy interviews have a negative impact on the results as well as future surveys. Since similar surveys were conducted in 2013, 2015 and 2017, it was attempted to keep some questions unchanged while some questions/sections were adapted to the current situation of the industry.

The draft questionnaire was submitted to MBN for their input, changes were made and the final questionnaire was approved by MBN.

The questionnaire was set up via a web-based tool and a link was emailed to all prospective respondents, who could complete the questionnaire online and submit it directly to the consultants. This electronic methodology has the advantage that, since many farmers are out during the day, the survey can be completed at a time most suitable to them.

However, especially the communal farmers do not all have access to the internet and are better reachable via telephone. Therefore, interviews with them were mostly conducted telephonically.

Sample:

The final sample size was as follows:

	Completed interviews
Board Member	7
General stakeholder	19
Commercial Farmer	77
Communal farmer	35
Total	138

Stakeholders interviewed consisted of important industry players from the following categories:

- ♦ Namibian Agricultural Union, Line Ministry and directorate, Producer/agricultural unions, Meat processors and Producer support industries.

The survey started with a screener question with the objective of only interviewing knowledgeable and legitimate respondents and the interview was only carried out when the question was replied in the positive:

SCREENER: Do you know or have you dealt with the Meat Board of Namibia in the past?

At the end of the survey, all respondents were asked whether they would like to remain anonymous or whether their replies can be linked to their name. The results in the table below show that 54% of the respondents indicated that their company name and comments may be provided to MBN. The respondents who indicated their willingness to be identified is a sign of confidence and trust in MBN and gives the organisation the opportunity to take actions directly linked to specific customer needs.

	Board Members	General Stakeholders	Commercial Farmers	Communal Farmer	Total
Keep anonymous	86%	42%	62%	36%	54%
You may provide my name and details to MBN	14%	58%	38%	64%	46%

Timelines

The data collection and interviews were conducted over a period between 10th August and 2nd September 2020.

Data and Quality Control

After detailed quality checks were performed on all questionnaires, all data was captured electronically and analyse. The results of the analysis have been summarized into a report.

5. DETAILED FINDINGS

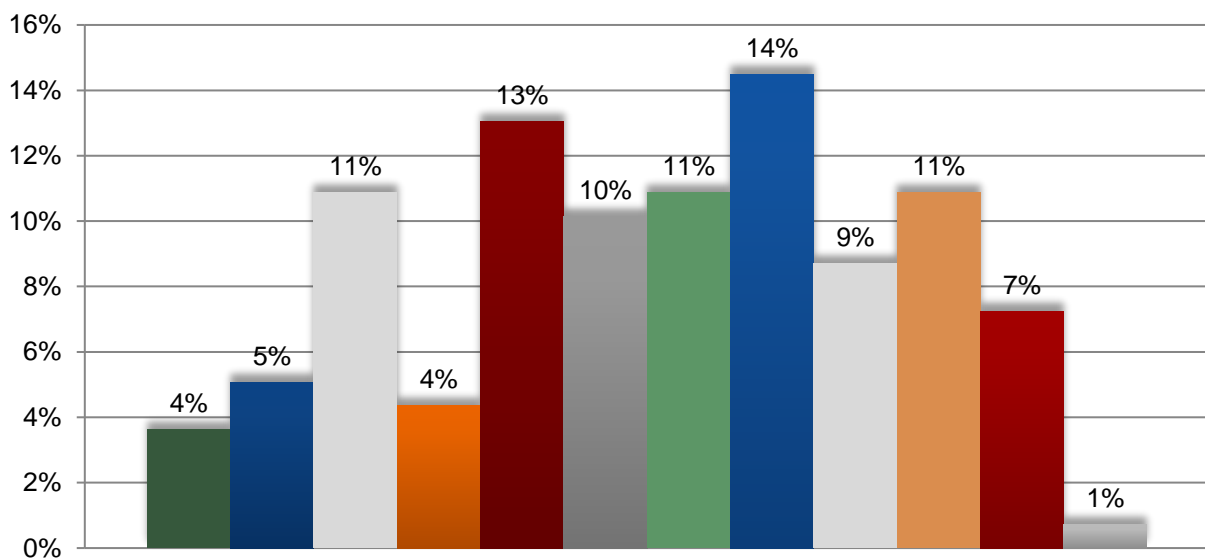
5.1 Role and Mandate

Role and Mandate of the Meat Board

The vision of the Meat Board of Namibia is to be an internationally recognised organisation that promotes a profitable, vibrant, quality-driven Namibian meat industry in local and international markets.

Respondents were asked to what extent they believe the Meat Board is living up to this role and achieving its vision and they gave a rating on a scale of one to ten, where one is not at all and 10 is completely.

MBN achieving its vision

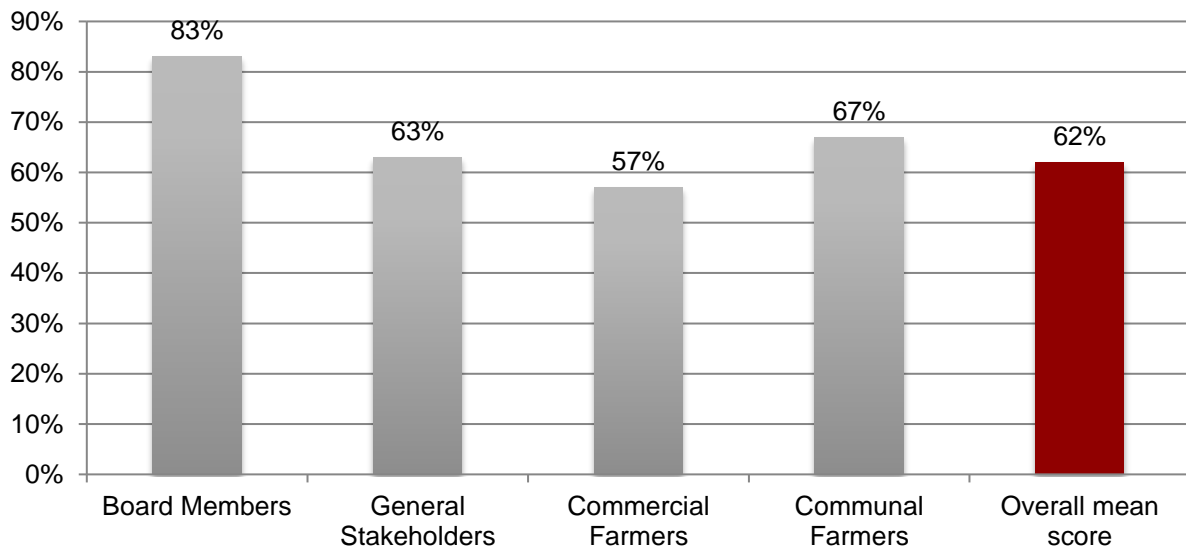


■ 1 - not at all ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 - completely ■ Don't know ■ Not their responsibility

34% (24% in the 2017 survey) of the respondents indicated their strong belief that MBN is achieving their vision (rating 8, 9 and 10); compared to 24% (28% in the 2017 survey) indicated that they are very doubtful and gave a rating between 1 and 4. The remaining 34% of the respondents gave a rating between 5 and 7, indicating that their perception on MBN achieving its vision is average.

7% (10% in the 2017 survey) of respondents indicated that they do not have sufficient knowledge about MBN to be able to rate its ability to achieve its mission.

In the chart below the perception of each of the stakeholder groups interviewed in terms of MBN achieving its vision has been converted into weighted mean scores as follows:

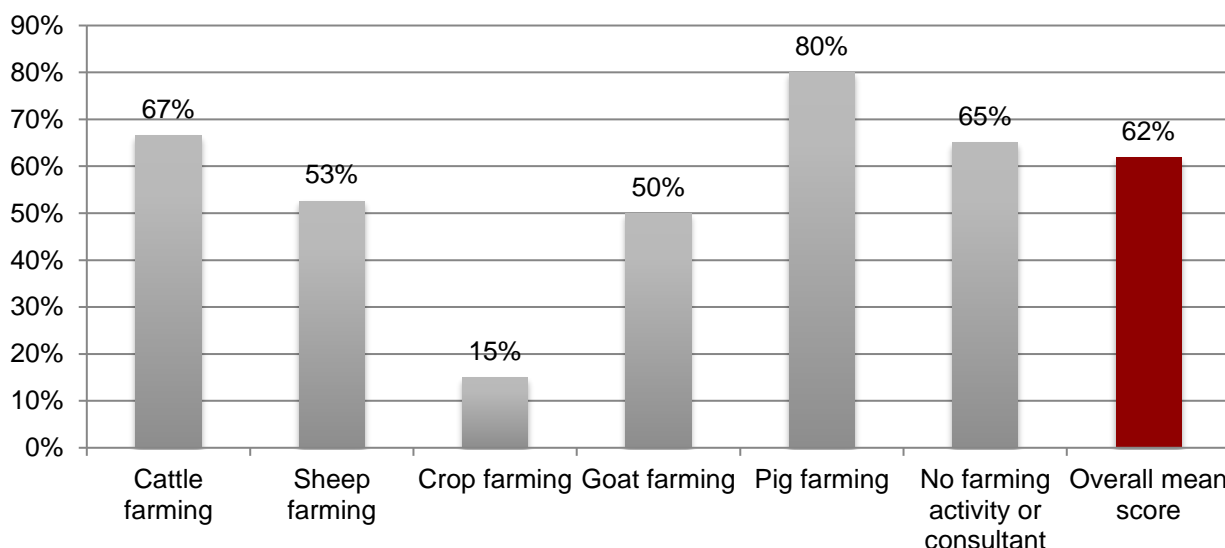


The overall mean score of 62% is better than in the previous survey (57%), however it reveals that some stakeholders still seem to be uncertain of whether MBN is able to achieve its vision.

Similar as in the previous survey, commercial farmers/producers seem to be most skeptical resulting in a score of 57% (51% in the 2017 survey). This is also reflected in the comments provided in the next section.

Ratings from board members and communal producers interviewed have resulted in scores of 83% and 67% respectively, depicting stronger confidence that MBN is achieving its mission compared to the commercial producers and industry stakeholders.

Segmenting the results into the stakeholder groups interviewed according to their type of farming activities shows results as follows:



When looking at the results is need to be kept in mind that the sample for goat, pig and crop are very small and therefore not necessarily representative of the industry, however it can give us a rough indication. Important are mainly the cattle and sheep farmers who contribute mostly to the survey sample and the meat industry in general.

Challenges

Respondets were asked to name the major challenges the Meat Board is facing in achieving its vision or living up to its mandate/role; those are shown below.

In some of the comments it is obvious that the respondents confuse Meatco and the Meat Board and that the comments they make relate to Meatco. However it shows that respondents do not always know what the exact functions of the Meat Board entail, which supports the fact that enhancing information sharing is needed.

Furthermore, it needs to be mentioned that the comments are given as provided by the respondents (verbatim) and therefore some repetitions are possible.

Board Members
<ul style="list-style-type: none"> • They only focus on export at the expense of Namibians and SADC because we don't see goat meat in any shelves in Namibia, why? It's due to them failing to promote all sectors of the meat industry. • We regulate the market and the other stakeholders are not doing things the way it should be done and as Meat Board, we feel it is a great challenge. • No one knows the role of the MBN and the mandate. • There are some existing systems put in place by the Ministry of Directorate of Planning, which the Meat Board cannot do anything about unless the systems are changed to allow the Meat
General Stakeholders
Meat Board mandate, services and general
<ul style="list-style-type: none"> • Too many regulations working against farmers on trade and border controls. There is no freedom due to monopoly on those regulations.

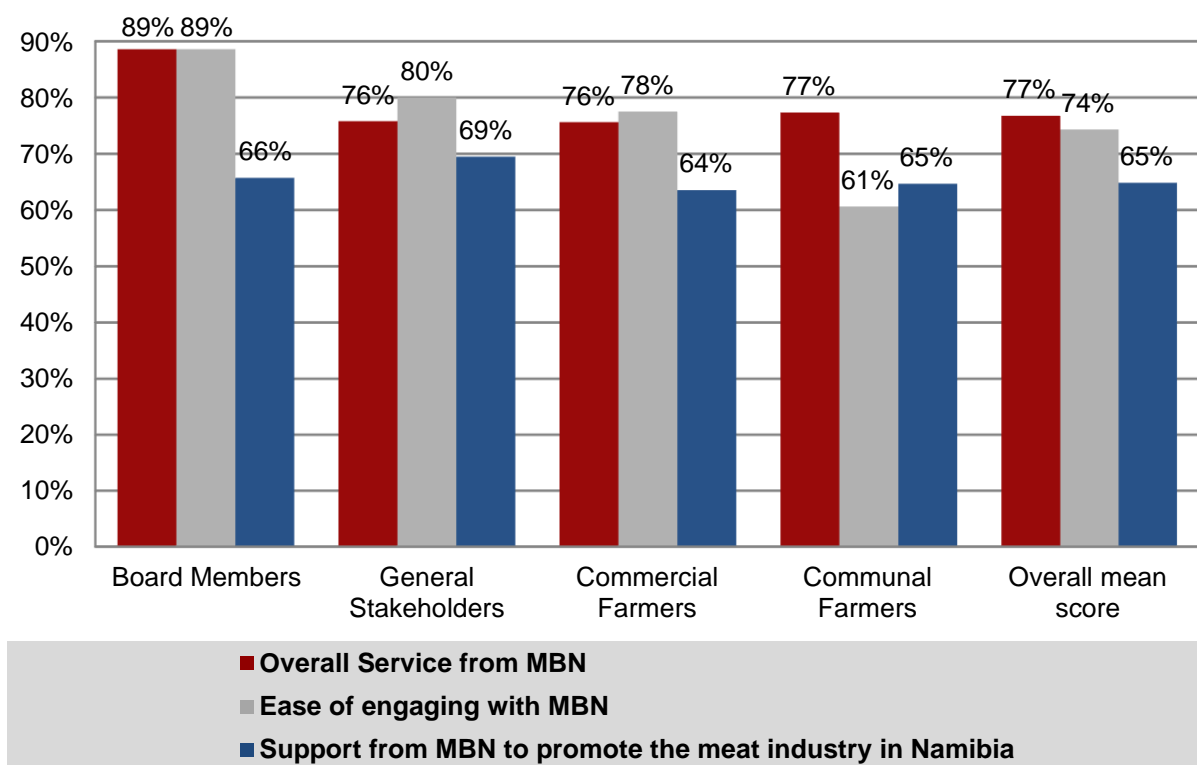
<ul style="list-style-type: none"> • Too little out-of-the-box, innovative thinking, incl. too much reliance on traditional markets No interest in developing beef trade north of VCF • Government is imposing the wrong things, such as export reforms and it is forcing Meat Board to go in their direction. Due to that, Meat Board is not fulfilling its roles.
Markets, Prices, Abattoirs, Selling of stock
<ul style="list-style-type: none"> • Lack of markets internationally. • Lack of coordinated efforts. They must engage or contact independent persons to assist them in achieving their goals • Lack of enough market research being done.
NamLITS
<ul style="list-style-type: none"> • Keeping NamLITS up-to-date and getting new (communal) cattle to register. We need a similar register for donkeys to start donkey trade with China.
Other industry challenges
<ul style="list-style-type: none"> • Economic challenges in the country.
Commercial Farmers
Meat Board mandate, services and general
<ul style="list-style-type: none"> • They are doing a great job, no challenges I can talk of. • Failure to stimulate change across the meat industry. They are failing to implement policies being discussed, even finding of new markets. • Due to government involvement and Meat Board listening more to government than to us farmers, it has resulted in small livestock falling apart due to poor decisions being made and Meat Board allowing too much government interference into their system. • Get right policies into action. Stop this nonsense of regulations and allow the private sector to run. Open up the free market system. Stop unproductive government policies because their duty is to see a user-friendly environment, not policy making. • To supply the farmer with better ear tags. Quality is very bad. Lots of losses and replacements – it gets expensive • Incompetence, failure to implement their strategies and government not supporting on international relations in trying to find markets for our local produce. • Balancing the needs of various role players (Producers, Manufacturers, Government, customers etc.) concerned with the agricultural industry and managing conflicting agenda's resulting from these diverse agenda's and ideologies • The problem is they don't execute what they get from the research they do. They don't have the ability to utilize research data they get. If they can use that information then they will be able to achieve greater things.
Markets, Prices, Abattoirs, Selling of stock
<ul style="list-style-type: none"> • No new market and drought. • Lack of better prices • No markets for small livestock, South Africa not enough. • Failure to open/free market
Promotion of meat
<ul style="list-style-type: none"> • There is a lack of promotion on our local products especially on small livestock. We need to see advertisements on TV, asking consumers to purchase our products.
NamLITS
<ul style="list-style-type: none"> • NamLITS is a sign of incompetence. They now ask us to do their job so what are we paying them for? • Lack of figures of how many cattle we have in Namibia as it will help a lot on marketing the meat and for us farmers to know if there is a need to increase supply.

Other industry challenges
<ul style="list-style-type: none"> • <i>Classification at abattoirs as only exporting to European countries and leaving SADC out is very wrong. If Meatco can focus on Europe then we need one or two abattoirs to focus on SADC markets.</i>
Communal farmers
Meat Board mandate, services and general
<ul style="list-style-type: none"> • <i>They must also think about communal farmers, they are only dealing for themselves. I don't see any vision.</i> • <i>Political interference.</i>
Markets, Prices, Abattoirs, Selling of stock
<ul style="list-style-type: none"> • <i>Exporting of sheep to SA is bad because of the rules and regulations.</i>
Support, engagement and information sharing
<ul style="list-style-type: none"> • <i>MBN is not reaching out to people in Rundu. We are not selling our cattle and not making a profit.</i> • <i>Reaching out to communal farmers seems to be a challenge for them.</i> • <i>Lack of resources, such as not having enough staff to reach out to communal farmers</i>
Other industry challenges
<ul style="list-style-type: none"> • <i>Drought and Covid-19</i> • <i>Bush encroachment</i> • <i>Animal diseases</i> • <i>Due to the redline some of the communal farmers in the Mukwe Constituency are cut off.</i> • <i>Market price</i>

5.2 Stakeholder Satisfaction

In this section the survey probed to assess the level of satisfaction with the service delivery of the Meat Board in terms of three indicators:

1. How satisfied are the stakeholders with the **overall service** from MBN?
2. How satisfied are the stakeholders with the **ease of engaging and doing business** with MBN?
3. How satisfied are the stakeholders with the **support** that the Meat Board is providing with regard to promoting the meat industry in Namibia?



In terms of assessing the stakeholder satisfaction with MBN's service delivery and ease of doing business or interacting with MBN, it appears that the stakeholders interviewed are generally content. In terms of the support that MBN is providing with regard to promoting the meat industry in Namibia, respondents seem to be more doubtful resulting in an overall mean score of 65%.

- ♦ When measuring the level of satisfaction with the overall service received from MBN an overall mean score of 77% was achieved with the higher score (89%) being received from the Board members, followed by communal farmers with a score of 77% compared to the commercial farmers and general stakeholders whose rating resulted in a score of 76%.
- ♦ In terms of how easy it is to engage or do business with MBN, an overall mean score of 74% was achieved, implying that it is relatively easy to do engage with MBN. This is also reflected in the section about the staff of MBN. Similar as above, it appears that the Board members

find it the easiest to engage with MBN whereas the communal farmers seem to have the greatest difficulties, which leads to a result of 61%.

- ♦ Regarding the support MBN provides to promote the meat industry in Namibia, an overall average of 65% was achieved, indicating that respondents seem to lack support. The commercial farmers are most pertinent around promotion the meat industry and developing additional markets resulting in a score of 64% followed by the communal farmers with a score of 65%. This result is worrying, as commercial farmers are the major producers, both in terms of numbers and contribution to agricultural income. The comments further down in this section shed more light on the expectations of the respondents.

5.3 Rating of Services

Rating of Functions of the Meat Board in Namibia

In this section respondents were given a list of **functions that fall within the mandate of the Meat Board** and were asked to rate how well the Meat Board fulfills it. The results are shown as mean scores out of a possible of 5.0 points, converted into percentages and are split by the various stakeholder groups:

	% <i>Don't know</i>	Board Members	General Stakeholder	Commercial Farmers	Communa l Farmers	Overall mean score
To assist in the creation and promotion of a strong quality brand in the export markets, i.e. FAN Meat	12%	100%	69%	70%	79%	73%
To facilitate access to export markets and development of new markets for meat	15%	77%	59%	59%	73%	63%
Import and export control to protect the meat industry	22%	93%	70%	72%	75%	74%
Issuing of import/export permits	27%	83%	86%	81%	83%	82%
To identify opportunities for value addition / business opportunities in the meat industry	8%	80%	53%	56%	67%	60%
To manage cattle, sheep, goat and pig sectors to achieve economic growth	7%	71%	69%	53%	77%	63%
Advising on the market-related production, processing and marketing of livestock	8%	74%	79%	59%	70%	65%
To assist the industry in the Northern Communal Area (NCA) to increase cattle & beef exports from the NCA	33%	70%	54%	61%	47%	56%
To perform classification services – classification of cattle & sheep at export abattoirs	16%	80%	81%	64%	71%	69%
To distribute strategic market information both nationally and internationally	9%	74%	68%	59%	76%	65%
To assist the Directorate Veterinary Services (DVS) in maintaining Namibia's animal disease status	18%	91%	91%	78%	75%	80%

To improve the quality of meat through the promotion of standards (FAN Meat)	15%	91%	87%	74%	76%	78%
To promote locally produced meat e.g. Seal of Quality in Namibia	9%	77%	80%	68%	76%	73%
To administer projects on behalf of the Government and industry on a cost recovery basis	33%	80%	84%	68%	79%	74%
To assist Government in trade negotiations and policy formulation	30%	83%	80%	67%	75%	72%
The pork market scheme: to promote the pig industry and protect against cheap imports	56%	66%	69%	63%	56%	64%

The table is intended to guide the management and board of MBN towards better service delivery, through knowing at a glance which stakeholder group requires more attention and in which aspects. The highest and lowest scoring functions are highlighted for each stakeholder group.

The services which were rated the lowest overall are: “to assist the industry in the Northern Communal Area (NCA) to increase cattle & beef exports from the NCA” (56%) followed by “to identify opportunities for value addition / business opportunities in the meat industry” (60%). The best rated services which are indicative that respondents are most satisfied with, are “MBN issuing of import/export permits” (82%) followed by “to assist the Directorate Veterinary Services (DVS) in maintaining Namibia’s animal disease status” (80%).

A further aspects which should be taken note of, is the percentage of “don’t know” replies as shown in the first column of the table; on some services a relatively high percentage of respondents do not seem to have sufficient knowledge about MBN to be able to rate them.

Low ratings in terms of the services and functions of the MBN were substantiated with the following comments:

Board Member
<ul style="list-style-type: none"> <i>In the Northern Communal Area they have a lot of cattle but they are not available for the market. They don't meet the requirements needed. Meat Board is trying to assist but again, the system in place from government prevents it.</i> <i>There is no effort being put towards getting markets for goats. There's no market at all and they are doing nothing about it. They have neglected small livestock, they are not promoting it enough.</i>
General Stakeholders
<ul style="list-style-type: none"> <i>1 - Northern Communal Area have more cattle than Southern Area but farmers in NCA suffer due to lack of markets. There's nowhere for them to sell especially with this redline issue. 2 -</i>

<p><i>Value chain should be beyond primary level, we must move to secondary level. Lack of diversified markets.</i></p> <ul style="list-style-type: none"> <i>The Meat Board is merely a facilitator for the import and export of livestock and meat - it should play a larger role in protecting the local industry and local job creation. The Meat Board does not have the capacity to advise on meat processing / value-addition in a practical manner - their advise is only based on theory.</i> <i>The Meat Board should appoint people with expertise in Market Development and improve its market intelligence strategy</i> <i>There's no meat market industry, we only have a livestock industry. NCA cattle and beef are below standard and its not Meat Board's duty to improve the NCA.</i>
Commercial Farmers
Meat Board mandate, services and general
<ul style="list-style-type: none"> <i>Some of these duties are not for Meat Board. It's hard to comment or rate on functions which doesn't belong to them and they have little influence on, especially now in changing them.??</i> <i>The classification process is too difficult</i> <i>Meat Board must promote all meat products regardless of Red Line issues. We need a fair market and promotions. They must not regard Red Line as an issue to sideline other producers</i> <i>My perception is that the MBN does not have the internal capacity to effectively advice on production and marketing of livestock beyond providing statistics and trends thereon. When it comes to the NCA and increasing cattle and beef exports my view is that there is very little to be done in this regard due to socio-economic challenges experiences in the region. In addition, the MB lacks the required legislated authority to implement actionable solutions that contradict views, policies and agendas of some of stakeholders.</i> <i>No markets</i>
Markets, Prices, Abattoirs, Selling of stock
<ul style="list-style-type: none"> <i>1 - No markets are being found. 2 - Poor prices are being offered to producers. Monitor of prices motion of small livestock.</i> <i>Tell us the reason why abattoirs are closing down. Can they close when there's enough meat to slaughter? There's no market in Namibia due to lack of open markets. On export only Meatco benefits, us farmers are getting nothing.</i>
NamLITS
<ul style="list-style-type: none"> <i>The online NamLITS system sometimes works and sometimes does not. This is a huge problem for farmers in distant areas, when permits are used and time is running out.</i> <i>The distance in the country really affects us when it comes to the issuing of import and export permits. Especially us in the south, it is difficult.</i>
Promotion of meat
<ul style="list-style-type: none"> <i>Currently we don't see Meatco products on Namibian shelves. We need to see more of our products in every shop across Namibia.</i> <i>On promoting local meat, more can be done as I feel we still have our meat products, especially for small livestock not in Supermarkets or on shelves. There's lack of promoting it to be on the shelves.</i>
Classification system
<ul style="list-style-type: none"> <i>Classification system that costs the producer money. Prices stay lower than South Africa.</i> <i>Classification/price structure of slaughtered cattle is outdated and serves the interest of SA feedlot industry. We need our own classification system which complies with international markets</i> <i>Currently the system favours the third party and not the producer. Unless we address that, the meat industry in Namibia will not grow</i>
Other industry challenges

<ul style="list-style-type: none"> • Veterinary services is failing to provide vaccines. They are not coming anymore which now risks our animals to diseases. • Abattoirs are closing down. No market available in spite of Namibia having quality meat.
Support, engagement and information sharing
<ul style="list-style-type: none"> • You hardly hear about the Meat Board and them engaging government on difficult issues like the past drought.
Communal Farmers
<ul style="list-style-type: none"> • FAN meat is hardly recognised as it hardly does advertisements or makes it's role known to farmers.
Support, engagement and information sharing
<ul style="list-style-type: none"> • I have never been advised by anyone on market related production. I am not aware if and where they distribute strategic market information. • Information to communal farmers in other regions except northern regions, is very poor. We need information through radio, • MBN hardly assists Northern Communal Area farmers • They should provide more information on how to handle medication, i.e. injections.
Markets, Prices, Abattoirs, Selling of stock
<ul style="list-style-type: none"> • In communal farms, we don't have access to the international or national markets. In the Kavango East region, we are limited to only below the red line, thus affecting cattle prices. • There is no market to sell our meat
Promotion of meat
<ul style="list-style-type: none"> • MBN would support the communal farmers if it promoted local meat. ??? • Not a lot of people are aware of FAN meat or what it does, so FAN Meat should perhaps do more marketing. Hardly any support for Northern Communal farmers now.

What do the respondents see as the **biggest challenges the meat industry** is facing in Namibia?

	Board Members	General Stakeholders	Commercial Farmers	Communal Farmers	Overall mean score
Low meat prices	14%	26%	34%	26%	30%
Changing weather conditions	43%	26%	16%	91%	38%
Limited demand of meat / meat products	14%	16%	3%	14%	8%
Controlled market	0%	16%	12%	46%	20%

Apart from the above challenges, further comments were identified and are summarised below: (a full list of comments can be seen of the raw data set, which is supplied to MBN):

- Lack of markets primarily for small livestock.
- Government intervention which leads to ineffective and poor managed meat industry; nce; incompetent government officials in key policy and regulatory positions; badly formulated government policies; crowding out of the private sector; "state-capture like" operations of certain officials in government and parastatals; high costs associated with inputs, such as feed, medicine, fuel, electricity, water, etc; lack of competition in the export abattoir sectors; terrible land reform

programmes and government policies such as NEEF/NEEEB, which totally discourage investments in the sector.

- Lack of support to primary producers which is by far the biggest employer. If the primary producer is supported and looked after, they can be more effective. The more effective they become the more on-farm jobs will be created, more wealth will be created which will lift the whole economy in smaller towns and smaller settlements. Economic turnaround ALWAYS starts with the PRIMARY PRODUCER! The challenge will be to support and nursing primary producers back on to their feet to be profitable again and small business owners in smaller towns will also have a livelihood.
- Price advantage of selling in wealthy markets not passed on to Nam producer, who gets paid on SA price plus a few N\$.
- Disparity between the rate of rising costs and the rate of changing the meat price. Political interference. Inefficient value chain (e.g. Abattoir).
- Animal health status: Failing veterinary service, lack of sufficient vaccines. The VCF should protect the country against FMD, but DVS are not serious about their job!

Importance of the Meat Board's engagement

Do respondents feel the Meat Board's engagement is important in terms of the following four aspects:

	Board Members	General Stakeholders	Commercial Farmers	Communal Farmers	Total
The Meat Board should continue with the engagement in the management of import or export restrictive schemes, e.g. sheep and pork					
Yes	100%	74%	70%	80%	75%
No	0%	5%	13%	0%	8%
Not sure	0%	21%	17%	20%	17%
The Meat Board should assist the Directorate of Agriculture Production, Extension and Engineering Services (DAPEES) (MAWLR Extension Services) in presenting extension information to producers (not on-farm)					
Yes	100%	89%	70%	86%	78%
No	0%	5%	8%	3%	6%
Not sure	0%	5%	22%	11%	16%
The Meat Board should be engaged in the selling of bush eradication herbicides ("arboricides")					
Yes	100%	37%	75%	51%	65%
No	0%	16%	6%	23%	12%
Not sure	0%	47%	18%	26%	23%
The Meat Board should maintain NamLITS helpdesk					
Yes	100%	100%	94%	97%	96%
No	0%	0%	4%	0%	2%
Not sure	0%	0%	3%	3%	2%

"The Meat Board should maintain NamLITS helpdesk" is an important function and should remain according to 96% of the respondents.

“The Meat Board should be engaged in the selling of bush eradication herbicides (“arboricides”)” is not seen as important and only 65% of the respondents shared the view of the MBN taking it up. However, there seems to be a relatively high level of uncertainty with 23% of the stakeholders interviewed not having a distinct opinion.

FAN Meat (Farm Assured Namibian Meat)

Does **FAN Meat (Farm Assured Namibian meat)** sufficiently and efficiently demonstrate the advantages of buying Namibian?

	Board Members	General stakeholders	Commercial Farmers	Communal Farmers	Total
Yes	100%	79%	42%	41%	50%
No	0%	16%	39%	9%	26%
Don't know	0%	5%	18%	50%	24%

50% (55% in the 2017 survey) of the respondents feel that FAN Meat (Farm Assured Namibian meat) sufficiently and efficiently demonstrates the advantages of buying Namibian.

The table also shows that there is still a fair deal of uncertainty regarding FAN Meat promotion resulting in 24% (10% in the 2017 survey) of the respondents not being able to express their opinion on this issue. This is primarily seen amongst the communal producers with 50% having answered with “don’t know”.

5.4 Rating of Service from Staff

Respondents were asked to rate the service that they receive from the staff members of the MBN. Only the departments that respondents have touch points with, were rated.

		Board Members	General Stakeholders	Commercial Farmers	Communal Farmers	Overall mean scores
Management/Admin/ Finance	The staff is easy to reach and willing to assist	97%	82%	81%	83%	83%
	The staff is competent and knowledgeable	94%	86%	82%	83%	84%
	The staff is friendly and provides a good service	97%	85%	81%	85%	84%
Trade / Marketing (Advisory, Statistics)	The staff is easy to reach and willing to assist	90%	73%	71%	87%	77%
	The staff is competent and knowledgeable	87%	73%	70%	82%	75%
	The staff is friendly and provides a good service	80%	73%	71%	78%	74%
FanMeat / NAMLITS ear tags / Stock brand	The staff is easy to reach and willing to assist	97%	77%	73%	95%	80%
	The staff is competent and knowledgeable	94%	75%	75%	93%	81%
	The staff is friendly and provides a good service	94%	74%	72%	92%	78%
Classification (Abattoirs)	The staff is easy to reach and willing to assist	87%	71%	73%	84%	76%
	The staff is competent and knowledgeable	87%	69%	76%	84%	78%
	The staff is friendly and provides a good service	80%	71%	71%	84%	74%
Law Enforcement / Border Control (Exporters)	The staff is easy to reach and willing to assist	92%	74%	71%	72%	75%
	The staff is competent and knowledgeable	88%	72%	70%	72%	73%
	The staff is friendly and provides a good service	80%	70%	71%	76%	73%

The table provides an indication on how the respondents rate the service and engagement with the staff members of the various departments of MBN. The fact that all scores resulted in 70% and above reveal that generally respondents perceive the staff of MBN willing to assist, competent and providing a good service.

Management/Admin/Finance department has received the highest scores versus the Law Enforcement / Border Control (Exporters) having received slightly lower scores.

Similar to most of the findings in the survey, the commercial farmers appear to be most skeptical having resulted in slightly lower scores overall.

5.5 Communication with the Meat Board

Are respondents satisfied with the **level of interaction and engagement with** the management team of MBN?

	Board Members	General stakeholders	Commercial Farmers	Communal Farmers	Total
Always	100%	74%	44%	36%	49%
Sometimes	0%	21%	37%	42%	34%
Don't know	0%	5%	11%	18%	11%
I do not require any engagement or interaction with MBN	0%	0%	8%	3%	5%

Do respondents feel **sufficiently informed** by the MBN about the meat industry and future trends etc.?

	Board Members	General stakeholders	Commercial Farmers	Communal Farmers	Total
Always	86%	47%	29%	33%	36%
Sometimes	14%	42%	33%	39%	35%
Never	0%	5%	7%	15%	8%
Don't know	0%	5%	25%	12%	18%
I do not require any engagement or interaction with MBN	0%	0%	7%	0%	4%

The two tables above reveal that respondents generally feel well informed and are satisfied with the level of interaction with the Meat Board.

In total, 49% (21% in the 2017 survey) of the respondents agreed that they are always satisfied with the level of engagement with MBN and 36% (27% in the 2017 survey) always feel sufficiently informed.

A further positive trend is that in the 2017 survey 11% of the respondents mentioned that they never feel sufficiently informed about the meat industry in Namibia compared to only 8% in the current survey. It seems that particularly the communal farmers do not always feel informed and information sharing should be targeted towards them.

Preferred Communication Medium

How would respondents **prefer any relevant information** from MBN to be communicated to them?

	Board Members	General stakeholder s	Commercial Farmers	Communal Farmers	Total
Email	100%	89%	83%	43%	75%
SMS/WhatsApp	57%	32%	45%	74%	51%
Presence on Farmers' days	57%	53%	29%	43%	37%
Radio	57%	21%	25%	43%	30%
Meat Board Newsletter	57%	47%	34%	9%	30%
Annual Report	71%	53%	18%	11%	24%
Newspapers	43%	21%	13%	20%	17%
Via website	43%	37%	12%	9%	16%
Social Media (Facebook)	14%	21%	4%	26%	12%

(The total per column adds up to more than 100% as most respondents have chosen more than one medium)

The majority of respondents (75%) prefer to have information from MBN communicated to them via email followed by SMS/WhatsApp

Presence on Farmers days also appears to be popular and provides for opportunities for personal engagement and discussions. Especially communal farmers commented in various sections in the survey that MBN has not visited them for a long time. The current situation with the COVID-19 measures may have contributed to a lack of visits to farmers' days. Amongst the commercial farmers only 29% have mentioned visits of MBN as preferred.

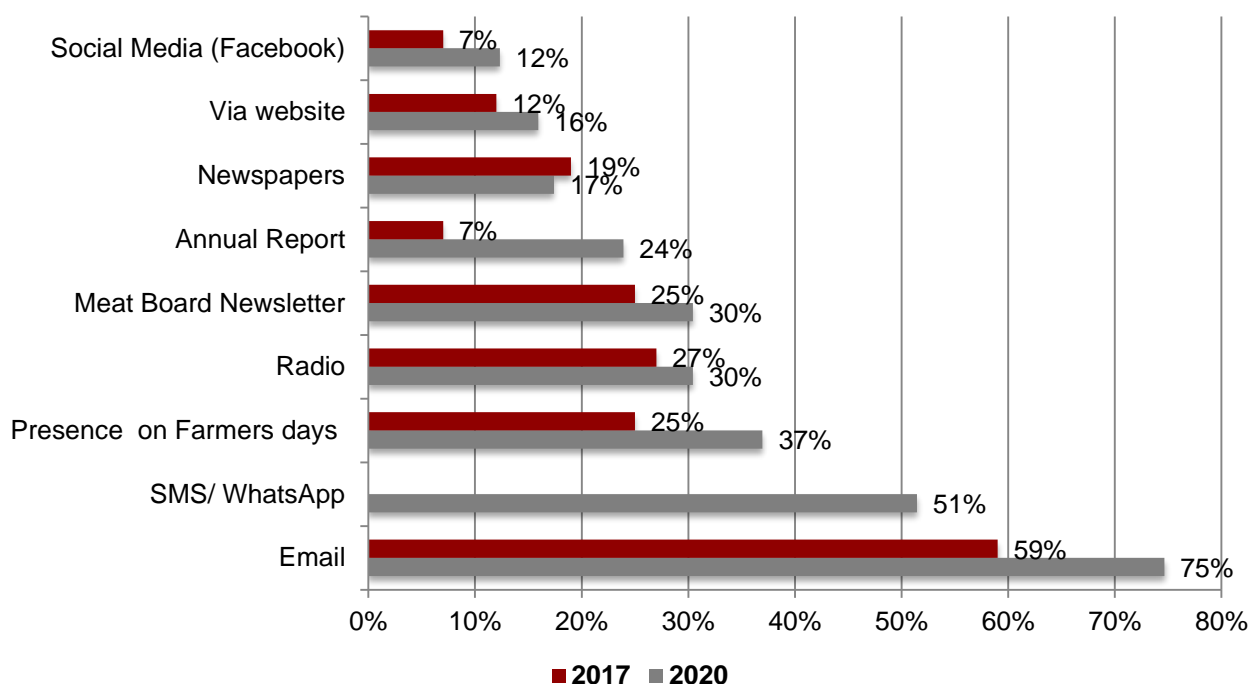
For the communal farmers it seems that SMS/WhatsApps work best; and the board members seem to favour getting information from the annual report.

It appears Facebook is not featuring strongly as a preferred medium, however with more than 3500 followers, the Facebook page of MBN draws quite a lot of interest. It is therefore essential that the page is updated regularly with important and relevant information.

In terms of radio usage, the use of different channels and languages should be explored.

Comparing the preference between the surveys conducted in 2017 and the current survey show as most pertinent finding that newspaper is the only medium that has lost preference, and all other mediums have gained preference.

Preferred communication medium



Respondents pointed out that they would like to have more information on the following topics:

General stakeholder	
<ul style="list-style-type: none"> A database that is easily accessible which shows year on year (at least 10 years) monthly weaner and slaughter prices - to aid in decision-making on when the best marketing season is. Better statistics (long-term and aggregated annual statistics). The Meat Board should ensure that all stakeholders comply with fair market practices and no farmer should be exploited through low prices paid at the expenses of other stakeholders along the value chain. Therefore, the Meat Board should initiate an investigation of traces of collusion in close collaboration with the Competition Commission of Namibia. What happens with all the money collected from commercial farmers? Who approves the budgets/expenditure and strategic plans/actions of this organisation? Are there annual audited financial reports made available? 	
Commercial Farmers	
<ul style="list-style-type: none"> New markets available. New markets for small livestock. Would like to see what the prices are in the countries we export to in US dollar or Pound NamLITS change of ownership - the system is failing me. I wrote to them and no change has been made Role of Meat Board. 	
Communal Farmers	
<ul style="list-style-type: none"> Are they able to provide a market for farmers? Provide information / advice and perhaps medication to maintain animal diseases When will they remove the Redline in Kavango East region? Updated information must reach us on time Weekly prices on slaughtered cattle MBN should provide information in Oshiwambo as wekkm for example when sending an SMS or via newspaper or pamphlets 	

It is suggested to scrutinise the information and include some of the topics in the communication strategy.

Communication and Marketing Activities

This section focuses on the marketing activities of the Meat Board and respondents were asked to rate the various initiatives that MBN is making use to share information.

	<i>Don't know</i>	Board Members	General stakeholders	Commercial Farmers	Communal Farmers	Overall mean score
The Meat Board's brochures & pamphlets	16%	93%	83%	80%	76%	80%
Meat Board's website (being informative and well structured)	28%	97%	76%	78%	79%	80%
MBN's weekly radio talk shows (Talk-shows on NBC)	26%	94%	72%	84%	80%	82%
Meat Chronicle (Quarterly via email)	11%	100%	88%	86%	78%	86%
Meat Flash (Weekly via email)	11%	100%	87%	88%	80%	87%
Weekly prices (via email)	13%	100%	83%	84%	75%	83%
Interaction on Facebook	46%	97%	63%	73%	82%	78%
SMSes sent on announcements/ information sharing	17%	94%	76%	87%	93%	88%

The table reveals that generally most marketing activities and initiatives have achieved very good scores with the overall average scores ranging between 78% and 88%.

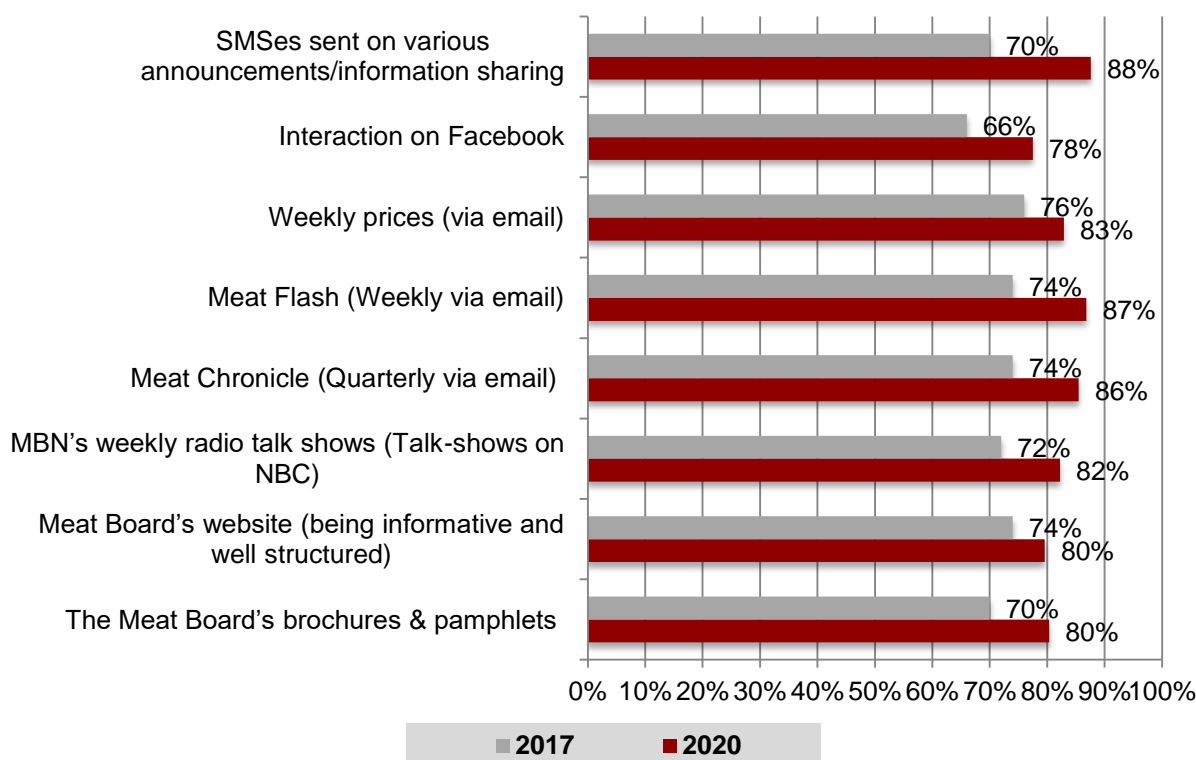
Respondents seem to value the SMSes sent on announcements/information sharing the most which resulted in a score of 88%.

Interaction on Facebook has received the lowest score, however the findings also showed that 46% of the respondents do not seem to have interacted on the page and have replied with “don't know”.

The results also reveal that still a relatively high percentage of respondents replied on the various activities with “don't know” indicating that they are not aware or familiar with the various marketing services of the Meat Board and can thus not rate the efficiency thereof.

When looking at the chart below it shows that all initiatives have resulted in a higher score compared to the previous survey which is an indication that respondents appreciate and value them more and that MBN has made an effort to improve communication.

Communication and marketing activities of the MBN



Comparing the “don’t know” replies with the 2017 survey, reveals that there are no significant differences between the two surveys.

	% don't know in the 2017 survey	% don't know in the 2020 survey
The Meat Board's brochures and pamphlets	14%	16%
Meat Board's website (informative & well structured)	21%	28%
MBN's weekly radio talk shows (Saturday – landbou radio)	25%	26%
Meat Chronicle (Quarterly via email)	13%	11%
Meat Flash (Weekly via email)	13%	11%
Weekly prices (via email)	9%	13%
Interaction on Facebook	42%	46%

Overall, it can be surmised from this section that even though MBN seems to be doing a lot with regard to promoting themselves and information sharing, often stakeholders are not aware of it and the information often does not reach the stakeholders. This has also been supported in some of their comments throughout the report.

Low ratings in terms of communication and information sharing were substantiated with the following comments:

Board Members
<ul style="list-style-type: none"> On media, we are doing well but I have a feeling that language must be shared. The books must be printed in all languages due to the level of illiteracy in Namibia.
General stakeholders
<ul style="list-style-type: none"> Didn't receive any SMS or Facebook notifications.
Commercial Farmers
<ul style="list-style-type: none"> I don't receive anything from Meat Board, not on email or Facebook, nothing. The webpage is too complex and the information too difficult to find. Remember we have bad data service, it is almost impossible to use the website
Communal Farmers
<ul style="list-style-type: none"> It is draining to read a lot of information. Short explanations and pictures are good or listening to short talks. MBN's weekly radio talk shows must have a specific time and day which must be informed to the farmer through SMS, so that we make time for it and not miss out. Most are not provided in the NCA. Must make sure the farmers are reached and not left out, especially on important matters. Network is poor in the area and we don't receive all information from Facebook, etc. and we hardly listen to the radio as we are out farming most of the day. Pamphlets are not easy to get, sometimes you might miss it when it is being given out.

5.6 Qualitative Comments

The questionnaire made provision for an open ended question in terms of whether respondents have any further suggestions for the Meat Board and/or comments about the organisation.

Replies are provided as verbatim in order to ensure that the meaning and context of the answers are fully captured.

It is important to mention that the comments and suggestions included here are as provided by the respondents on the questionnaire. Further, the comments and suggestions reported herein are the opinion of respondents and some may need to be clarified through facts.

Furthermore, it is also important to note that many comments do not fall within the mandate of the Meat Board and it appears that mainly producers see this section as an opportunity to vent any frustrations that they have even if they do not relate to the functions and interactions with the Meat Board.

Board Member

- 1 - As Meat Board, we don't have enough employees to cover us in every region. There's need to have more Meat Board representatives on the ground in each region. 2 - Let's get rid of the red line, it is undermining other producers. There is a need to promote all producers regardless of the red line issues on boundaries.
- The biggest challenge is not MB but other parties like Meatco. We are exporting what we can't kill. There is a need for better cohesion between the role players to address such issues. Abattoirs demand a bigger share of income at the expense of the producers and I feel it should be a 50/50 or win-win environment. 2 – There is a lack of restocking strategy, especially after a drought. When drought comes, it seems year after year we don't have a plan or solution, we are always caught unprepared. 3 - Lack of promotions. There is no flexibility in terms of marketing. More promotions must be carried out. Look for markets in Zimbabwe, Zambia, Angola and Africa at large.
- Meat Board is doing their best but the organisations around them are difficult to work with. Meat Board must continue to push for small livestock to be put into Namibian shelves. If we market the products well, we can attract more local customers / markets for small livestock producers.
- We need more markets for small livestock and we need to achieve it throughout SADC as a whole. If we expand our search for markets in SADC, then we can achieve our goals.
- What is affecting our small livestock producers is that it is cheaper to import the meat than it is to produce. We don't have the feed for animals in Namibia; we first need to produce the feed, especially in the Kavango Region near the Kavango River. We must start to produce our own feed, enough to feed the nation in and out of drought seasons. At the moment we import the feed and it is hard for the small livestock producers to get into the market at prices the producers ask.

General stakeholder

Meat Board mandate, service and general

- It is a great organisation.

- *The Meat Board should establish a market intelligence and market development unit that will be responsible for global monitoring of the meat sector and implementation of consultants' proposals in various studies. The Meat Board should be fully supported by all stakeholders especially the Namibian Government to implement and manage its mandate.*

Markets, Prices, Abattoirs, Selling of stock

- *We need a free market system. If we export our small livestock, we must be given freedom to sell the meat or livestock at the highest selling price available, without controls. If allowed, we will see job creation rising. Currently we only contribute 40% to the GDP which I feel we can do better if regulations / border controls can be flexible in allowing farmers to sell at the best price they get when exporting. The system must be the same as beef regulations.*
- *Prices being offered to communal farmers are very low. We should enrich our local markets with good quality meat before exporting like being done currently because it is undermining communal market growth.*
- *A weekly price doesn't help if you can't measure it against previous months/years statistics. Please also aid in the comparisons with earlier months and years.*
- *We are not benefitting from other international markets as we only depend on South Africa. It is high time that we have independent abattoirs.*
- *Let's do things differently. Apart from beef, let's focus on leather selling, horn selling because there is a lack in the value chain*

NamLITS

- *Due to high stock theft in Kavango on ear tags, we personally introduced a new system: if one applies for a permit, they must bring along the ear tag number of the stock and that way it allows us to track the original owner of the cattle or stock. If the ear tag number fails to match with the owner's reference, we then consult the owner reflected by the tag number for verification purposes.*

Commercial Farmers

Meat Board mandate, service and general

- *Meat Board itself is doing a very good job, keep up the good work.*
- *Meat Board is doing well, only now with Covid-19 and the economic downturn they must consider free export and free market options. That is the only way to keep the producers alive.*
- *They are doing well. I don't have anything bad to comment about Meat Board*
- *Meat Board's helpdesk is not helpful at all. If you call them, they don't answer and they fail to respond to problems on time.*
- *Meat Board itself is good, the fight for producers but they are becoming voiceless. Stakeholders like DVS, Meatco and government have helped each other in destroying the meat industry.*
- *It seems that MBN is nowadays an extension of MAWL and their independence in resolutions are thus questionable. This might be just an impression and not factual.*

Support, engagement and information sharing

- *Meat Board officials are not motivated and we see by their lack to execute the information they get from farmers.*
- *Meat Board is meeting its mandate but there is a challenge that most producers don't understand the role of the Meat Board. There is a need for the Meat Board to outline its roles more and more until every producer understands.*
- *MBN should focus on marketing issues. Get pro-actively involved in communicating new relevant information and get market access to most lucrative markets.*
- *Meat Board's information must be available everywhere, like Agras, Kaap Agri and any other farm related shop.*

Markets, Prices, Abattoirs, Selling of stock

- *Improve the local price of sheep, it is very cheap and as farmers we don't benefit anything compared to South Africa. In Namibia we are getting 5 times less.*
- *To identify new markets, the only way is to have new abattoirs focusing on Africa because the one we have now only focuses on European countries and it's not helping us anymore as we are struggling with growth.*
- *There are no sheep left in Namibia due to the controlled market. We need a free market system which will allow competition amongst abattoirs and prices will be better. There is a need for the revival of the meat industry.*
- *We are happy with the opening of small livestock borders for trade and the prices being offered. We are happy, we are getting good prices.*
- *We need the free market to be re-introduced. Let's go back to open market system, which is the only way to stimulate growth in the meat industry.*
- *We should have more cattle slaughtered locally because now what is happening is, in South Africa, they have better prices on offer for livestock and now more cattle are being exported to SA and farmers slaughter there for better money. We should increase the cattle numbers in Namibia and our markets should offer better prices.*

Promotion of meat

- *FAN Meat is a waste of time. It doesn't help us in getting better prices.*
- *The classification system is too complicated, there are too many grades and we do not want it. I don't know what the Meat Board is doing to protect and promote our products*

NAMLITS

- *On NamLITS you now ask us producers to do your job by entering our own information, so what is your duty and role now? The Meat Board is full of incompetence.*
- *We have a problem with NamLITS. Even with the new online system, we still encounter problems because their information is never correct. I normally visit them but still no corrections are being made.*
- *NamLITS is a disaster. The data process is not accurate and it is full of mistakes. Cattle are on wrong premises of farmers, wrong names of ownership. There is a need to change the system.*
- *It is only the NamLITS system and transport permit system that should be running more smoothly. Animal numbers do not correspond with the numbers handed in at the local state vet offices. The Meat Board levy that is subtracted per animal slaughtered is far too high, compared to the service one is getting out of this organisation.*
- *I am not happy with NamLITS helpdesk, especially their online service. They don't respond.*
- *On NamLITS - we can't get through the system to get permits. They must relook and restructure their system, it is causing problems.*
- *There are loopholes in the NamLITS Meat system, the system is not smooth. I would prefer Meat Board itself to run the system for it to have stability.*
- *We are happy with NamLITS because now we can do all via online at the farm*

Other industry challenges

- *We are not happy with the quarter system because the quarter per year is not fair. I might have weaned 90% and another farmer 40% and we are told to use the same quota which is not reasonable. The quarter should be according to the amount of percentage a producer is having. That system must be revised.*
- *We are not happy with the grading system because with the same cattle I sold to Meatco, whilst there, I got a good grading but when I was not there, the difference was huge. We feel we are being cheated.*
- *Arboricides should be provided to farmers like before. We don't know why it has stopped. The program must come back as it is expensive for a farmer to buy arboricides*

Communal Farmers
Support, engagement and information sharing
<ul style="list-style-type: none"> • <i>Keep us updated on new information.</i> • <i>Please visit communal farmers at auctions and farmers events</i> • <i>Revise mentorship programmes so that many communal farmers can be included and not left out.</i> • <i>Some farmers don't have animal brands so MBN should be as informative as possible.</i> • <i>We as stakeholders should take hands and assist each other. MBN should also keep us informed as to what they are up to in terms of us communal farmers, especially in these difficult times</i>
Markets, Prices, Abattoirs, Selling of stock
<ul style="list-style-type: none"> • <i>I am trying to sell my cattle but there is no market. I am earnestly asking for MBN to assist in creating a market for communal farmers to sell their cattle.</i>
Ear tags and brands
<ul style="list-style-type: none"> • <i>They must assist with ear tags since some of my cattle do not have ear tags.</i> • <i>They should have smaller branches in communal areas so that farmers can buy ear tags from there.</i> • <i>They should sell ear tags to communal farmers or at least assist with that. I have a lot of cattle without ear tags and the government has been quiet on that.</i>
Promotion of meat
<ul style="list-style-type: none"> • <i>They should promote locally produced meat by also buying from communal farmers.</i>

6. RECOMMENDATIONS AND REMARKS

The consultants are not entirely familiar with the functions and services of the Meat Board and the actual business processes and strategies. It needs to be mentioned that the survey probed for general perceptions and therefore it is not possible to make in-depth technical and operational recommendations referring to the actual business processes and strategies based solely on the survey results or for example suggestions on finding new export markets etc.. We may therefore make recommendations which have already been implemented to a certain degree or which the board is already planning to implement.

Furthermore, there might be some recommendations and highlights mentioned in this section which have been made in some of the previous survey reports, but due to many challenges being the same for the stakeholder groups these recommendations are still applicable.

When looking at the survey results, it is very important to mention that stagnating meat prices, more cumbersome documentation, an increase in animal poaching and theft, and the current COVID19 situation often leave farmers frustrated and might have an effect on some of the ratings. Respondents might see the survey as an opportunity to vent some of these frustrations.

It is not the mandate of the Meat Board to control these frustrations, but throughout the report it is clear that producers/farmers seem to be expecting some form of support and assistance from MBN as well as a closer engagement with MBN. The challenge to consider is therefore, what needs to be done to instil trust into the Meat Board and what does MBN do to raise the profile of farming for the future?

Challenges

- ♦ In summarising the major challenges which emerged from the survey are as follows:
 - Some stakeholders are not entirely informed about what the Meat Board is doing and which functions are falling within the mandate of the Meat Board. In this survey, it showed that respondents seem to be more informed which resulted in a slight increase in positive ratings in many aspects however there is still confusion about roles, mandate and responsibilities of the Government, the Meat Board and Meatco. For example the Meat Board does not control prices, the Meat Board does not purchased cattle etc.

- The meat industry is not growing and this is often blamed on a lack of finding new markets. The internal market in Namibia is limited and it is believed that the industry can only grow if new international markets are found.
- The meat industry is being overly regulated with reforms and policies which do not contribute to fair and effective marketing possibilities. Stakeholders interviewed suggested to have a free market system as they believe that it have a positive effect on the prices and demand. The sheep market system was primarily criticised in this context.
- Namibia only having one abattoir which focuses on mostly on export markets was mentioned as contributing to an overregulation, and a lack of a free market system in terms of pricing structures. Namibia would need additional abattoirs to counteract monopoly. Again, the small stock producers were primarily concerned.
- The communal producers/farmers need more assistance and engagement with the MBN. The red line is seen as a hindrance is trading and selling cattle. It was felt that MBN to not always assisting the industry in the Northern Communal Area (NCA) to increase cattle & beef exports from the NCA.
- The new online NamLITS system is still challenging for some farmers and it was mentioned that the figures often do not balance or correspond.
- Changing weather conditions make farming more difficult.

Communication of survey results

- ◆ We recommend that the results of the survey are communicated to the Meat Board management. It is also vital that the key findings are communicated to staff to ensure that they know how stakeholders feel about the board and which areas need improvement.
- ◆ Comments should also be given to employees - especially if they are directly involved. The positive comments could motivate them and show that they have done something right.
- ◆ We recommend that MBN sends a form of communication (by e-mail or SMS/WhatsApp) to all clients, thanking those who responded to the survey for their time and effort and their valuable contributions.

Communication with stakeholders

- ◆ Communicating regularly with stakeholders and creating a positive understanding can help you build effective long-term relationships with key groups. Different stakeholders have different interests, attitudes and priorities. Effective communication ensures that they receive information that is relevant to their needs and builds positive attitudes to an organisation or project.

- ♦ By keeping people informed about different business activities, you can limit misunderstandings, clarify objectives and improve productivity. When communicating with stakeholders, be sure to tailor your communication based on your audience's needs and current knowledge.
- ♦ It was found that there is still confusion and/or ignorance about the exact functions of MBN, and MBN gets blamed for things/actions or functions which do not fall within their mandate for example some communal farmers mentioned that MBN does not buy their cattle. This underlines the importance for intensive information sharing. In the light of this, it is recommended that Meat Board continuously shares information. Stakeholders have unrealistic expectations of issues which do not fall within the mandate of MBN.
- ♦ Therefore, it is vital how the information is shared. MBN needs to find the right channels which will reach various stakeholders and even the public at large.
- ♦ It is suggested to engaged more with the media to provide a better understanding of the meat industry, its challenges and the role the Meat Board plays within this complex industry.
- ♦ Comments were also made relating to the language in which the brochures and information is printed. It was felt that the relevant information should be translated into the various local languages to be read and understood by the diverse cultures of farmers in Namibia.
- ♦ Communal producers commented that small regional MBN offices would assist in more engagement and pratical and operational benefits for example the possibility of buying ear tags within their region.
- ♦ Some respondents mentioned that they do not receive any communication from MBN. It is suggested to review and update the current database of stakeholder contacts.
- ♦ Some specific communication needs were mentioned and MBN should share information on it if possible. Examples for these are amongst others what is the role of MBN, which kind of support can producers expect from MBN, statistics (long-term and aggregated annual statistics), how to obtain export permits etc.

Overall performance

- ♦ Comments often referred to MBN “doing a good job” and is shown in the overall service delivery of MBN being rated fairly positive with an overall mean score of 77%, and has shown an increase from the previous two surveys. However, it became clear that some stakeholders share the view that the MBN does not provide sufficient support to them; and primarily the communal farmers sometimes find it difficult to engage with MBN – it is important to nurture your relationships.

- ♦ It is seen throughout the survey, that the commercial producers are most critical which is quite concerning because they are the highest in numbers and contribute the most towards the GDP.
- ♦ As mentioned already comments were often made in particular from the commercial producers that the MBN should rather be operating on sound business principles and that the interference of the Government is hindering the MBN in achieving its vision.

Marketing

- ♦ Despite the fact that the MBN does not need to promote itself in the classic term, it is still important to create awareness about its services, strategies and future amongst its stakeholders.
- ♦ Generally, most initiatives being done to share information from MBN have been rated positively by the different stakeholder groups.
- ♦ Most stakeholders indicated that they prefer to receive information from MBN via email. This method of communication is easy, quick and cost effective. MBN could, as a quick win following the survey, send an email to their stakeholders thanking them for participating. Apart from that the SMS/WhatsApp are being appreciated by the stakeholders and especially the communal farmers find this an effective way to be notified of announcements or relevant information. However, some mentioned, that they do not receive any notifications; it is therefore important that contact details are updated continuously.
- ♦ MBN's website was rated as informative and appealing resulting in a mean score of 80%, however 28% of the respondents were not able to provide a rating which leads to the assumption that they have not seen or visited the website. MBN's website has been updated and redesigned and portrays a modern and clear image, and it contains all the important information. It is therefore recommended that MBN promotes the use of its website more profoundly; the website is an important medium whereby a wide scope of information can be made available.

Promotion of meat

- ♦ The survey results have revealed that respondents are of the opinion that the general demand for meat and meat products needs to be increased in Namibia which will result in better prices for their livestock. Especially the sheep farmers have expressed dissatisfaction and want additional markets to be developed.

- ♦ MBN can be involved more actively in promoting meat and meat products in terms of running awareness campaigns encouraging people to eat more meat and meat products. It was mentioned that too little branding on Namibian meat is seen on supermarket shelves (meat is only sold without highlighting its origin or any brand) and hardly any goat meat is seen on the shelves, etc. It was felt that more opportunities for value addition / business opportunities in the meat industry need to be identified and this function has resulted in a mean score of only 60%.
- ♦ Most people in Namibia are not aware about the health benefits of buying Namibian meat – MBN can get involved in educating the public (seal of quality). It is believed that more education is needed in terms of the various grades of meat – the public is often not aware of the various grades and ideal usage thereof.
- ♦ It is believed that MBN does quite a lot in terms of promoting meat, but it could be that the campaigns are not always consistent, thus not becoming engrained in people's minds and ultimately in their behaviour. It is very important that all marketing and advertising material (brochures, pamphlets but also electronic newsletters) and elements of the corporate identity have to enforce the developed marketing strategy with a very clear message and consistency towards stakeholders.

People

- ♦ Generally, stakeholders interviewed experience the staff of MBN to be friendly and willing to assist. However, a few comments related to the staff being unproductive, difficult to get hold of and a lack of decision making amongst them.
- ♦ In the current survey, the service was rated in the different departments which give the management of MBN the opportunity to intervene more specifically where necessary. It is recommended to involve the staff of the different departments and regions of various levels to give their input and suggestions for possible improvements of service levels, better workflows and service innovation.
- ♦ Furthermore, it is suggested to develop action plans for areas of concern, assigning persons accountable as well as specific measurable deadlines. The progress made on the corrective actions should be monitored regularly (weekly, bi-monthly or monthly) as part of the management controls. One area where some actions might be valuable is to offer assistance or develop user guidelines with the NamLITS online system.
- ♦ It is important to create a positive experience for stakeholders and customers when engaging or visiting the MBN. Putting thought and effort into ensuring a great experience for your customers will boost your business reputation more than just ensuring a great product. This is most applicable for farmers visiting the NamLITS offices.

Future surveys

- ♦ In order for MBN to draw some comparative conclusions and develop trends it is suggested to conduct a similar survey every two to three years. Surveys need to be uniform as far as possible to be able to compare results with each other effectively. Improvement can only be seen if the proverbial “apples are compared with apples”. It is thus recommended that the focus areas in the questionnaires remain the same.

7. CONCLUSION

“Perceptions are what people believe to be true. Actively managing stakeholders’ perceptions is fundamental to a strong and creative organisation.”

By embarking on this stakeholder survey, MBN has taken an important step into the right direction to take informed decisions and to strengthen their knowledge about the feelings and opinions of their stakeholders.

Please be aware that the areas of concern raised by the respondents should by no means discredit any party, but should at this stage merely provide the opportunity to understand the perceptions of the stakeholders and create action plans and implement them and thereby reap the business benefits.

Acknowledgement

We would like to thank the Meat Board of Namibia for awarding us the opportunity to be part of their endeavours to strive for continuous improvement. It is critical that all parties who have access to the information utilise it in a positive spirit. The message throughout the organisation should remain a positive one and the purpose of this exercise should never be lost from sight, namely, to use information received for development towards improvement and increased levels of stakeholder satisfaction.

Any actions agreed should be part of the larger business plan to ensure alignment, focus, monitoring and execution.