

**BACKGROUND RESEARCH PAPER:
A STATUS QUO STUDY ON THE PROFESSIONAL AND
RECREATIONAL HUNTING INDUSTRY IN SOUTH AFRICA**

**Prepared for the Panel of Experts appointed by the Minister of
Environmental Affairs and Tourism**

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ACRONYMS

BEE	Black Economic Empowerment
CHASA	Confederation of Hunters Associations of South Africa
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
DEAT	Department of Environmental Affairs and Tourism
ECGMA	Eastern Cape Game Management Association
EU	European Union
GDP	Gross Domestic Product
KZN	KwaZulu-Natal
NEMA	National Environmental Management Act
NETCAB	Network and Capacity Building Programme
PHASA	Professional Hunters Association of South Africa
SADC	South African Development Commission
SANParks	South African National Parks
SAPHCOM	South African Professional Hunting Committee
SAQA	South African Qualification Authority
TASA	Taxidermy Association of Southern Africa
USA	United States of America
USAID	US Agency for International Development
USD	US Dollar
ZAR	South African Rand

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1. EXECUTIVE SUMMARY

In response to the comments received on the draft norms and standards for the sustainable use of large predators, the Minister of Environmental Affairs and Tourism appointed a Panel of Experts to draft norms and standards for the regulation of professional and recreational hunting in South Africa. In order to draft these norms and standards, the Panel of Experts called for the production of four background research papers, one of which was on the '*status quo of the professional and recreational hunting industry*' which was to look at factors such as the size, structure, ownership, economic benefits, and areas of concern and impacts, amongst others.

South Africa is the world's third most biologically diverse country but has a divided history when it comes to social development. People who were historically dependent on natural resources such as wildlife were denied the opportunity to utilize them leaving their livelihoods compromised. The government now faces the challenge of addressing these inequalities and it making industries such as hunting available to all.

The hunting industry has developed into a multi-million rand industry which offers a viable form of land use in areas not suitable for other forms of income generation. Multiple income generating activities are possible on areas which offer hunting. Wildlife can not only be 'sold' for hunting, but also for photographic safaris, or ecotourism activities, as well as its meat and hide.

Unfortunately, as is possible with any other multi-million rand industry, it has become fraught with problems. Not only is it accused of unethical and immoral acts, but the lack of regulation and a solid legislative framework, has made activities appear corrupt, with the focus on short-term gains rather than solid conservation objectives (Krug, 2001).

This document provides a brief background to hunting in South Africa during the past few decades. The demand for the hunting industry, from both the side of the hunting concession owner, as well as the hunter, are briefly outlined and a description of the types of hunting, which includes both the reasons for hunting as well as the various types of equipment used, are given.

From a quick look at the organization of the industry, it becomes clear that a formal framework for its operation does not exist in South Africa. Many privately initiated structures make attempts at controlling sections of the industry, but a lack of 'teeth' renders them relatively ineffective.

South Africa's hunting industry is relatively large with between 5000 and 6000 hunters having visited the country during the 2003/2004 hunting season. These hunters shot 53 453 animals with a combined value of ZAR265 million (USD40.7 million). In addition, South Africa has an estimated 200,000 resident hunters and this sector of the industry is worth around ZAR2,9 billion. Although no formal statistics are kept for this sector of the

hunting industry, 'best estimates' have been used where necessary.

South Africa offers over 60 indigenous mammals as well as a host of alien species, hybrids and colour morphs. The fierce competition in the industry has led both hunting outfitters and wildlife producers to seek out niche markets. Offering hybrids and/or colour morphs is one way of doing this. The contribution to the conservation of wildlife by these operations has been questioned, however, and this question has been expanded to ask whether wildlife production belongs under conservation or agriculture.

Around 9000 farms are used for wildlife production. A further 15 000 are used for mixed stock and wildlife production. With around 73% of the land under wildlife being privately owned, it is clear that this sector is an important stakeholder in the industry. Communal land only contributes around 13% while the balance is State land.

Despite the majority of the land and wildlife production operations being in private hands, benefits do spread to other sectors of society. Between 5000 and 6000 jobs are provided by the industry and an estimated 63 000 jobs are provided by secondary industries such as tourism. Other benefits include tips, revenue for conservation authorities and communal landowners, education/training/capacity building, conservation levies, meat, and eco-tourism opportunities.

For the purposes of this report, industries 'secondary' to the hunting industry include huntable wildlife production, taxidermy, meat sales, and live sales. Huntable wildlife production has become an increasingly popular option for farmers, especially those in marginal areas but it appears as if this market has now reached saturation level. The taxidermy industry has a mixed reputation for the quality of its trophies and this results in the loss of income generation when the hunter takes his/her trophy back to his/her country of residence for processing. There are currently only three large meat exporters. The industry used to be larger but the strengthening rand reduced the viability of this as an option for many producers. In 2004, 23 455 animals were harvested for meat production. Live sales is an important component of the industry as a whole and had a turnover of ZAR87 million in 2001. Despite the mutual dependence of these industries, there are no legislative links between them.

Although the hunting industry has shown rapid growth in the past few decades, it has been slow to transform and encourage a broader diversity of society to become involved in the industry. Capacity training programmes have often been *ad hoc* or, where formally structured, only involve a small number of individuals. It is, however, generally seen as an important need within the industry.

The marketing of the industry is generally undertaken by people who have little to no formal training in marketing. Misrepresentations and miscommunications have been known to occur which can lead to frustrated and disillusioned clients, be they foreign

nationals or South African citizens. While Hunting Outfitters should be free to market their own businesses, steps need to be considered to limit the possibility of creating a poor reputation for hunting in South Africa.

The impacts of the hunting industry are large. On the one hand, interest in huntable wildlife production, partially as a result of the demand for hunting, has resulted in a substantial increase in the amount of huntable wildlife in South Africa and the percentage of land surface available to huntable wildlife. On the other hand, it has been the recipient of considerable media attention with the focus usually being on practices considered unethical, inappropriate or even cruel by civil society. Although not documented, the negative press received by the industry has the potential to affect other sectors such as tourism, whether or not it is wildlife related. As a developing nation which relies strongly on its natural resources, the potential loss of foreign income must be viewed seriously.

The constraints faced by the industry are presented in two sections, constraints from international or regional parties and constraints from within South Africa. The constraints from other countries includes legislation, disease spread risk and competition.

The internal or domestic constraints facing South Africa's hunting industry include:

Improving the image of hunting to ensure the sustainability of the industry;

Determining whether hunting should fall under conservation or agriculture. It is possible, however, that different sections belong in different categories but this needs further consideration by government;

Implementing an effective information system which can assist in making management decisions;

Recognising that hunting, and its associated industries, form an important part of local economies, often providing income generating options where few others exist;

The reestablishment of a forum to provide transparent decision making, and a formal link between all stakeholders in the industry is necessary;

Investigating ways and providing practical advice to hunting outfitters, wildlife producers, and wildlife and hunting organizations regarding the implementation of black economic empowerment and other capacity building programmes;

The transferring of benefits other than those forming part of remuneration packages need to be investigated further;

The role of secondary industries, and their ability to impact both negatively and positively on the pure hunting industry needs to be looked at. The contribution to biodiversity conservation by some of these industries, i.e. put-and-take wildlife production and the breeding of hybrids and colour morphs needs clarification and structuring;

The marketing of hunts should be done in such a way that misrepresentations and hunter disappointment should not occur. The development of a national strategy should also be looked at in conjunction with South Africa's other eco-tourism activities;

Although part of a free-trade system, the considerable variances in hunt and huntable wildlife prices needs further consideration. The production of price guidelines has a

potentially valuable role to play in ensuring hunter and wildlife producer satisfaction; and, The governance of dart safaris needs to be relooked at. Although originally intended to assist farmers and/or reserve managers in offsetting management costs, this has not been the case in practice.

INTRODUCTION

The Department of Environmental Affairs and Tourism (DEAT) published a set of draft norms and standards for the sustainable use of large predators in South Africa in early 2005. This document received a diverse range of comments during a public commentary process, the tone of which encouraged DEAT to appoint a Panel of Experts to develop norms and standards for the regulation of hunting in South Africa. In June 2005, the Panel called for the production of a series of background research papers to assist them in meeting the terms of reference for this undertaking.

One of the four papers commissioned was ‘a status quo study on the professional and recreational hunting industry in South Africa’. The aim of this paper was to assess the current status of the industry in terms of its size, structure, ownership, economic benefits, and areas of concern and impacts, amongst other factors. The South Africa office of TRAFFIC, the wildlife trade monitoring network, was contacted to undertake part of this assignment and this paper fulfils that obligation.

South Africa is classified as a developing country and is well known for being rich in natural resources. Indeed, it is recognized as the third most biologically diverse country in the world (Anon., undated a). With a recent history of inequality and injustice, the South African government faces the challenge of bringing about the social and economic upliftment of broad sectors of society that were previously disadvantaged. Creating development opportunities with respect to wildlife-based tourism is one means for achieving this goal. As opposed to other land uses, wildlife potentially offers multiple-use options. For example, animals can be used for wildlife viewing and then hunted, either for biltong or for trophies. If hunted for trophies, the meat and hide can also become an additional source of income, allowing a suite of revenue-generating activities (Barnett and Patterson, undated).

Both non-consumptive wildlife viewing, which can be a high-impact form of wildlife use, and hunting, which is generally regarded as a high-return, low-impact wildlife use, have played important roles in securing a future for wildlife resources in South Africa. Generally speaking, areas suitable for tourism based on wildlife viewing need to be scenically beautiful and uninhabited by people, as well as offering a high level of service and preferably contain the “big five” (lion, leopard, rhino, buffalo and lion). In fact, areas offering these criteria are limited. Hunting, on the other hand, can be successfully undertaken in areas which offer lower levels of service, do not contain the “big five” and are not necessarily regarded as scenically beautiful. Consequently, hunting can be offered in marginal areas and areas where wildlife viewing or photographic safaris are not possible (Barnett and Patterson, undated; du P. Bothma, 2005; Krug, 2001).

While hunting has its comparative advantages, being a high-return industry, it is also open to corruption and a focus on short-term gains. Further, because in most instances a life is

taken, hunting is also open to moral and ethical questions. It is, thus, an industry which requires careful regulation and a high degree of compliance with best practice standards. This document outlines the current situation surrounding recreational and professional hunting in South Africa, highlighting the key challenges and concerns facing the industry.

METHODOLOGY

In 1999, TRAFFIC East/Southern Africa (TESA) was sub-contracted by the US Agency for International Development (USAID), under the Network and Capacity Building Programme (NETCAB), to conduct an assessment of the sport hunting industry in the Southern African Development Community (SADC) region. At the time, the sport hunting industry faced many pressing issues in the region, including the imposition of bans, the withdrawal of predator quotas, the possible transference of management structures to community-based institutions, land tenure issues and continuing problems with monitoring, administration and quota setting. This project assessed the parameters, dynamics and status of the sport hunting industries in five SADC target countries namely, Botswana, Namibia, South Africa, Tanzania and Zimbabwe.

This background research paper draws heavily on the document produced during the NETCAB project. In addition, wherever possible, information has been updated and expanded upon through review of current literature and consultation with key stakeholders.

BACKGROUND

With a rich biodiversity, and being one of only two African countries to offer the “big five”, South Africa has been a popular destination for hunters over many years. Since colonial times, however, the industry has been largely restricted to white landowners, their friends and relatives, and wealthy foreign tourists. In the past, it was not uncommon for safaris to be about three months in length but, with modern day work pressures and other commitments, the time spent on hunting safari has been considerably reduced to not longer than three weeks. With hunts now typically packaged into 7-, 10-, 14- and 21-day safaris, there is greater pressure on the hunter to find the required huntable wildlife in the allocated time (Barnett and Patterson, undated).

By far the majority of hunts in South Africa take place on privately-owned wildlife production units, but limited hunting opportunities also exist on State and communal land. Interest in wildlife production by private individuals greatly increased in the mid-1960s when Ezemvelo KZN Wildlife (then the Natal Parks Board) employed biologists to advise and assist landowners with wildlife and veld management. In KwaZulu-Natal alone, the number of conservancies has risen from the 22 farms involved in the first conservancy in 1978 to 227 conservancies, comprised of 3392 members, in 1999 (Anon., undated b). This was followed by the introduction of conservancies which allow neighbouring landowners to pool resources, allowing more ecologically sound management efforts due to the

combined land available, and reduced costs for aspects such as fencing and wildlife guards (Krug, 2001). They can also reduce a landowners expenses in terms the number and cost of wildlife guards and fencing. Today there are around 9,000 wildlife farms in South Africa today, as well as about 15 000 farms with both wildlife and domestic livestock, which vary in size from a few hundred hectares to a few thousand hectares (Adie *et al.*, 2004; Damm, 2005).

Due to the benefits it can offer, wildlife production, hunting, and their associated industries, have experienced rapid growth in recent years. From a financial perspective, wildlife production has shown the fastest growth in the agricultural sector (Radder *et al.*, 2000). It has expanded into areas where more 'classical' forms of agriculture have not been viable (Anon., CHASA *in litt* to Department of Environmental Affairs, August 2005) and, thus, has provided a welcome boost for local economies. With this rapid expansion has come the development of particular niche markets, such as the breeding of hybrids and colour morphs. In general, there has been little regulation of these activities and they have raised a number of concerns amongst government and civil society.

Demand/need for industry

The demand for the industry has two primary sources: the owner of the hunting concession who encourages hunters to hunt, and the hunter himself who wishes to pursue hunting activities.

Hunting concession owners and industry: In South Africa, hunting concessions are found in the private sector as well as under the control of provincial wildlife authorities or communal entities. The private sector has the largest stake in the hunting industry, with a multitude of individual wildlife production units being the most common hunting concession unit. These are seldom large enough to be self-regulating in terms of wildlife numbers, and the concession owner/manager needs to remove the surplus wildlife. The options open to the farmer include live sales, cropping for hides and meat, and hunting – either for meat or for trophies (Krug, 2001). All of these options help the farmer ensure that wildlife is a lucrative resource and a feasible land use option.

Hunting opportunities also exist on some provincially owned reserves as well as on communal land. The provincial nature conservation officials have made these hunting opportunities available for reasons similar to those of private wildlife production unit owners, i.e. the revenue generated by hunting can be used to offset management costs and assist in removing surplus wildlife. Communities which allow hunting on communal land generally use the money generated for social development or invest it in developing infrastructure for other activities, i.e. ecotourism ventures, which have the potential to bring in revenue on an ongoing basis (Krug, 2001).

Hunters: Obviously, hunters themselves create and promote demand for hunting

opportunities. Various studies have shown a wide range of reasons which motivate various individuals to engage in hunting activities. While some reasons put forward will be challenged and criticized by those opposed to hunting, they nonetheless provide insight into personal motivations by individual hunters. Radder (2003) listed 30 reasons why foreign hunters hunt based on a survey carried out in the Eastern Cape. In this study, the reasons given included being outdoors/in nature/enjoying wildlife (26%), seeking a challenge (10.3%), experiencing the hunt (10.3%), enjoyment (5.7%), the collection of trophies (5.2%) as the primary reasons for hunting and other various reasons (42.5%).

On the whole, hunters believe that they are making a valuable contribution to conservation and regard themselves as “conservationists” (Anon., undated c). Many popular articles refer to the fact that there is more huntable wildlife in South Africa now than there was 100 years ago (du P. Bothma, 2005). These articles fail to point out that although there may be more huntable wildlife now than 100 years ago, wildlife numbers are still considerably lower than they were 500 or more years ago. They also fail to take into account changes in management techniques, i.e. wildlife is no longer shot out to control tsetse fly *Glossina spp.*, and changes in attitudes, hunting is no longer an essential part of survival and the provision of food. It is now frowned upon by certain sectors of society.

One of the targets set at the World Parks Congress, Venezuela, 1992, was the need for each country to conserve at least 10% of its land area. South Africa only has six to seven percent of its land formally conserved by government but the area covered by privately owned wildlife production units tips the total to just over the 10% target. This land does not, however, fully represent South Africa’s vast biodiversity, and there remains a need for more land to be formally conserved by the State. The announcement on 6 September 2005 by the Minister of Environmental Affairs and Tourism, of the declaration of South Africa’s 22nd national park, which will ultimately enable linkage with the Mountain Zebra National Park and assist in the conservation of the endangered Cape mountain zebra *Equus zebra zebra* (Anon., 2005a), reflects the scale of commitment required of government to achieve this target.

Types of hunting

The reasons why hunters hunt can be divided into three main types - trophy hunting, traditional hunting, and meat or biltong hunting, the latter being fairly unique to the country as a form of citizen hunting. A limited amount of subsistence hunting also takes place, but it is generally undertaken under conditions considered to be ‘illegal’ under current wildlife legislation and regulations. No definition exists in the legislation of these types of hunting. Brief descriptions of each type of hunting are given below:

Trophy or sport hunting: In this type of hunting, the hunter, generally a foreign

national, functions as a 'client' and hunts purely for sport reasons in a designated location for a predetermined number of specific huntable wildlife species, with the objective of keeping some part of the animal as proof of the hunt. Generally sold as pre-arranged hunting packages, sport hunting can be one of the more expensive forms of hunts. Currently, trophy or sport hunting is undertaken in all types of hunting concessions, whether owned by private individuals or entities, the government or communal landowners.

With limited time available in which to conduct the hunt, client hunters who have paid up front for the hunting experience, require reasonable certainty of getting what they want. Thus, in order to remain competitive, wildlife production units and other hunting concessions should be managed and regulated in such a way as to ensure and sustain reasonable numbers of huntable wildlife species, in general, and quality of trophy animals, in particular. The need to satisfy the clients demands can place enormous pressure on hunting outfitters, and on the professional hunter who must accompany the client during the hunt (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005), and they may resort to actions such as baiting or luring of predators in order to satisfy the demands of his/her client. The so-called 'canned hunting' operations for certain predators have arisen out of this need to satisfy client demands as they enable the outfitter to guarantee the appropriate animal. Once the hunter has taken what he/she wants - usually the horns, skull and/or skin - the leftover meat is either used as bait for a subsequent hunt, or is given to local wildlife production unit staff, government personnel or local communities, although the hunters may request some for his/her own meals.

Biltong or meat hunting: This type of hunting is almost exclusively conducted by resident South African nationals who combine the experience of hunting with the desire for wildlife meat. The skin, horns or other animals parts are seldom kept by the hunter as a trophy and, in some cases, hunting concession owners may earn secondary income from their disposal. Resident biltong or meat hunters do not need any form of qualification to hunt and no statistics of the number of hunters undertaking this type of hunting, nor the number of animals hunted, are kept by the authorities.

This type of hunting generally takes place on private land which may either have exemption status or not. The provincial nature conservation ordinances require that the hunter has the written permission of the land owner. This written permission must detail the information as specified in the nature conservation ordinances and Acts such as the hunters name and address, the wildlife which may be hunted, as well as their sex and the manner in which they may be hunted. If the farm has exemption status, the hunter does not need a permit but may only hunt wildlife as specified on the certificate of exemption. If the farm does not have exemption status, permits must be obtained from the local provincial nature conservation authority and

the hunter must still have the written permission of the landowner.

Permits are required to sell the meat of wildlife but any meat sold for human consumption must be processed by and accredited abattoir and passed by an inspector in terms of the *Meat Safety Act 40 of 2002*. Biltong hunters are exempted from these requirements in terms of the Act but would have to meet the specifications of the *Meat Safety Act 40 of 2002* if they were to sell their meat to an outlet or directly to the public (Steynberg, 2005).

Traditional and subsistence hunting: Traditional and subsistence hunting can be loosely separated according to format. Traditional hunting is now an accepted and recognized form of hunting undertaken by certain ethnic groups in South Africa. The motivation for this hunting is the provision of food, the satisfaction of cultural practices, to source medicinal material (Anon., 2005b) and to test the speed of the dogs (S. de Jager, pers comm., September 2005). These hunts are carried out with the written permission of the landowner as well as a provincial permit which stipulates a number of conditions, including the date and length of the hunt, the number of people and dogs on the hunt, the species which may be hunted and the penalties which may be incurred. There are eight registered clubs in KwaZulu-Natal (S. de Jager, pers comm., September 2005).

There has been much conflict surrounding this type of hunting, which is especially prevalent in KwaZulu-Natal and Eastern Cape. In KwaZulu-Natal, consultative meetings take place on an ongoing basis and Ezemvelo KZN Wildlife are trying to establish a committee to address various matters. The Endangered Wildlife Trust's Oribi Working Group are assisting in this matter (S. de Jager, pers comm., September 2005). The Eastern Cape conservation authorities handle hunting with dogs in the same manner as they would any illegal hunt. There has been little demand to set up clubs and committees as has been done in KwaZulu-Natal (J. Pienaar, pers comm., September 2005).

Subsistence hunting, on the other hand, is where wildlife is hunted for its meat using a wide variety of methods. Provincial permits and permission from the land owner are not obtained. Although recognized as a form of hunting, it does not take place within any legal framework.

A variety of equipment can be used to undertake any of the above forms of hunting.

Rifle hunting: This is the classical form of hunting whereby the hunter uses a rifle to make the kill. The caliber of rifle used depends on the animal being hunted.

Bowhunting: Bowhunting is the practice of hunting using compound, recurve, longbows or compound crossbows. It is a more challenging form of hunting as the

hunter needs to get closer to his/her quarry than he/she does with rifle hunting, and needs to make careful selection of his/her shot in terms of the species hunted and the draw mass of the bow. Accurate assessment of environmental factors, such as vegetation along the planned trajectory, weather conditions and wind, are of greater importance with bow hunting than with rifle hunting.

A number of hunting outfitters specialize in this form of hunting. Although most species can be hunted by bow, the professional hunter must carry a rifle with him when hunting dangerous wildlife or hunting at night. Species such as hippopotamus *Hippopotamus amphibius*, crocodile *Crocodilus niloticus*, Cape buffalo *Syncerus caffer*, elephant *Loxodonta africana* and rhinoceros may only be hunted during the day (Barnett and Patterson, undated).

Bow hunting has been criticized as 'cruel' in instances when the marksmanship has been poor. Consequently, various training programmes have been put in place by the conservation authorities to improve competency levels (R. Allan, pers. comm., 2001).

Dart hunting: This form of hunting allows the hunting concession owner to recover management costs such as darting an animal to replace a radio collar, through allowing a hunter to pay for the privilege of darting the animal. In this form of hunting, the hunter, together with his/her guide and a veterinarian, stalk the animal and dart it. The hunter may take a cast of the animal's trophy (for example the horn of a rhinoceros), and a picture for the sake of prosperity. Safari Club International has established a record book for such trophies (Friedman, 1999; P. Bartels, pers. comm., 2001). This form of hunting requires the hunter to get closer to the animal than he/she does in rifle hunting (P. Bartels, pers. comm., 2001).

Codes of conduct, ethics and procedures have been developed in South Africa but compliance is voluntary and reportedly not well adhered to (C. Hoogkamer, pers. comm., 2001). Indeed, the industry has been criticized for darting animals unnecessarily and being driven by money and not conservation management need (C. Hoogkamer, pers. comm., 2001). There is little requirement to report such hunts to conservation authorities making them difficult to assess and regulate (Anon., 2005c; C. Hoogkamer, pers. comm., 2001).

Wing shooting: This form of hunting is used exclusively for the hunting of birds. Unlike conventional rifle hunting, shotguns are the principal form of weapon used. Unlike rifle hunting which requires the specific placement of a single shot, shotguns spray pellets in the direction the shot is fired. A higher degree of marksmanship is required as the user of a shotgun needs to be able to take aim and fire quickly whereas the hunter using a rifle may take his/her time (within reason) to fire the shot and may also make use of a dead-rest to ensure steady aim and a telescope sight to ensure accurate placement of the shot. Dogs are also often used to flush the birds or

point to their location. It is generally undertaken by groups of hunters rather than individuals which could provide more opportunity for self-regulation. Appropriate habitat management is essential to this industry as the birds can't be fenced in. If the habitat is unsuitable, they will simply fly away.

Hound hunting: This is one of the more controversial forms of hunting (Anon., 2001), especially from a moral and ethical point of view. Only a few outfitters offer this type of hunting.

ORGANISATION OF THE INDUSTRY

Size and structure

There are approximately 1000 registered hunting outfitters in South Africa and about 2000 professional hunters (Anon., 2005d). **Table 1** provides the statistics for the 2003/04 hunting season.

Table 1

Professional hunting statistics for the 2003/04 hunting season

	PROVINCE									
WCECNCFSKZNNWGTLIMMPTOTAL	Registered HOs	2307050515210737066960	Registered PHs	77031450543825810802191,919	Active HOs	61334708074164330789	Active PHs	11304930150140231,08101,802	Clients	262,0027379307038151191,1272146,673
	Total animals hunted	10816.1024,8525,7333,7544,33943417,81574853,885	Animals per client	4.158.046.586.165.345.323.6515.813.58.08	Clients per HO	4.3315.0515.6808.7911.017.442.608.46	Clients per PH	2.366.597.9204.695.825.171.0403.7	Total hunting days	12041,7655,6995,5404,8185,2573808.7041,65573,938
	Average hunt length (days)	4.6220.867.735.966.856.453.197.727.7311.08	<i>SOURCE: Anon., 2005d</i>							
<i>KEY: HO – Hunting Outfitter; PH – Professional hunter; WC – Western Cape; EC – Eastern Cape; NC – Northern Cape; FS – Free State; KZN – KwaZulu-Natal; GT – Gauteng; LIM – Limpopo; MP – Mpumalanga</i>										

South Africa attracted an estimated 6000 foreign trophy hunters (“clients”) (Anon., undated c; Damm, 2005) during the 2004 hunting season and has approximately 200,000 resident hunters (Damm, 2005). In addition, there are an estimated 20 000 game bird hunters in South Africa (Berruti, 2005). Internationally, Safari Club International reported in their 2002 annual report that there are about 37.5 million active hunters internationally. Europe alone has some seven million hunters of which 25% (1 750 000 hunters) travel to destinations outside of the European Union (EU) (Anon., 2005e). Of these, South Africa is only attracting around 6000 foreign hunters per annum (P. Viljoen, The African Hunters Guild, *in litt* to TRAFFIC East/Southern Africa, August 2005; Anon., 2005d).

South Africa has approximately 9000 wildlife production units (17 million hectares), and a further 15,000 farms with mixed wildlife and domestic livestock under private ownership (Adie *et al.*, 2004), the majority of which are open to hunting in various forms. In addition to this, some provincial conservation authorities offer hunting on provincial reserves and/or recreation areas and communities such as the Makuleke, Mier and Ngome do or have

offered hunting on their land. (For further details, see section 7.3 – Land).

Ownership patterns and structures

In the absence of a comprehensive national management structure, there is a complex array of stakeholders involved in the regulation of hunting. Although membership of hunting organizations is voluntary, the *Firearms Control Act 43 of 2003* requires that hunters be members of an organization in order to renew their firearm licenses. Members are expected to adhere to the organizations codes of conduct but enforcement of this compliance is seldom possible. Below is a brief outline of who the main role players in the hunting industry are.

Government

National government – In general, the national government does not currently play large role in the broader hunting industry although a few guiding policies have been developed.

Provincial government – Currently, provincial governments play the leading role with the hunting sector falling under the department of nature conservation in each province. These bodies are responsible for regulating the industry in terms of the applicable Acts and Ordinances. Most provinces have guiding policies and regulations to enable the implementation of the Acts and Ordinances.

Private management bodies

Professional Hunters Association of South Africa (PHASA): PHASA, with a current membership of 1,300 professional hunters, is the leading professional hunting authority and mouthpiece in South Africa. PHASA reportedly works closely with South Africa's nine nature conservation bodies, and other stakeholders in the hunting industry to ensure that South Africa becomes 'the' hunting destination. Their mission is to 'represent and serve the interests of its members in a pro-active and dynamic manner, advance and promote professionalism and promote the benefits of professional hunting and the conservation of wildlife'. PHASA established a Conservation Trust in 2003, funded through placing a small levy (USD10 or €10) on each trophy exported from the country, to ensure that the industry is financially sustainable. The trust also provides educational opportunities and assists in community projects (G. Davies, pers. comm., 2001).

Confederation of Hunters Associations of South Africa (CHASA): CHASA was formed in 1980 as a result of a combined initiative from the three amateur hunting organizations in South Africa at the time. Their vision is "to lead in representing the hunter and in securing the freedom to hunt". CHASA functions through a Co-ordinating Committee which has representation from each Associations and is funded through the member associations. They represent amateur or recreational hunters in a variety of issues, conduct limited conservation projects and provide educational opportunities (Anon., undated d).

Provincial or Regional Hunter and Game Management Associations: There are approximately twenty such associations in South Africa. They represent the specific interests of hunters in their region. They usually organize wildlife sales, training

programmes, conservation projects and research projects.

Wildlife Ranching SA – this is an association for wildlife production unit owners. Their objectives are to: *i) maintain a mouthpiece to promote the game ranching industry; ii) promote products, tourism, activities and services offered by the game industry; iii) to act in a resource-sensitive and conservation-conscious manner; iv) to eliminate restrictions that have an adverse effect on game ranching; and, v) to promote tourism, prosperity, job creation and community development.*

Taxidermy Association of Southern Africa (TASA): TASA organizes an annual convention and competition whereby members can improve their skill and progress through the ranks of competency, from Apprentice to Professional.

Communal - Projects have been initiated jointly between government and communities, with a view to the communities taking ownership of the project once the necessary capacity has been developed (L. Maluleke, pers comm., August 2005). The Makuleke community established a committee to address various issues, including hunting. Factors such as times, species to be hunted, and awarding of concessions are debated.

Despite the above forums, there is a lack of a formal structure between government, and hunting, conservational and animal welfare organizations (Hamman, *et al.*, 2005; F. Schutte, Abrahamshof Private nature Reserve, *in litt* to TRAFFIC East/Southern Africa, July 2005; G. Verdoorn, SAHGCA, *in litt* to Department of Environmental Affairs and Tourism, June 2005). Such a structure is essential to ensure ongoing dialogue between these groups and will play a large role in reaching agreement and a way forward on issues. Indeed, the need for such an organisation was raised during several presentations at the Public Hearings held by the Panel of Experts on 11-12 August 2005. An attempt to develop such a forum was initiated through the South African Professional Hunting Committee (SAPHCOCOM). This body provided a forum for a range of stakeholders. Unfortunately this structure did not prove effective despite the idea having been a good one. A replacement forum needs to be established (Hamman, *et al.*, 2005; G. Verdoorn, SAHGCA, *in litt* to Department of Environmental Affairs and Tourism, June 2005).

Regulation

Wildlife and Hunting Policy Process

The historical protectionist attitude governing wildlife management has, with necessity, changed to one based on sustainable use and an ‘if it pays, it stays’ approach. The legislation, policies and norms governing the hunting industry have not evolved at the same pace.

Today, wildlife is seen as a renewable resource but also a valuable part of South Africa’s heritage. Where people were once excluded from wildlife areas, there is a growing understanding that their livelihoods depend on these areas and more adaptive, consultative forms of management need to be implemented. Without buy-in from the various roleplayers within the hunting industry, it is unlikely it will survive.

Hunting is one of the management options open to these people and, in a rapidly changing South Africa, the time is now ripe to relook at the policies and regulations governing this sector.

Wildlife and Hunting Legislation

When the South African government restructured the provincial makeup in 1994, it did not repeal the former homeland and self-governing territory legislation. This left a complex situation where provinces were required to implement anything up to nine pieces of legislation (Bürgener *et al.*, 2001). In some cases, this legislation even contradicted itself. For example, North West province implements both the *Bophutatswana Nature Conservation Act 5 of 1976* and the *Transvaal Nature Conservation Ordinance 12 of 1983* with the former allowing the capture of birds for personal consumption and the latter not. Confusion, and a disrespect for the law, results (Barnett and Patterson, undated).

The provincial legislation essentially prohibits the hunting of wild animals without the necessary permits or licenses. Landowners, their staff and relatives, and land occupiers, may obtain exemption from these requirements. Although the terminology differs, wildlife is classified into various levels of protection such as ‘Specially Protected Game’, ‘Protected Game’, ‘Protected Wild Animals’ and ‘Ordinary Game’. Each category affording differing levels of protection and permits are required accordingly (Barnett and Patterson, undated).

Restriction is also placed on hunting methods, times, places, import, export, sale, disposal and weapons used to hunt wildlife. The legislation also refers to the carcasses, parts and products of the hunted animal (Barnett and Patterson, undated).

Apart from the *National Environmental Management Act 107 of 1998* (NEMA), which, in line with the *Constitution of South Africa Act 108 of 1996*, supports the principle of sustainable development and requires that the use of renewable resources is to not exceed the level at which their integrity is jeopardized, South Africa does not have any national legislation governing hunting (Barnett and Patterson, undated). Wildlife production *per se* has been seen as part of the agricultural sector rather than as part of environmental management (C. Brokensha, Northern Game Ranchers Association, *in litt* to Endangered Wildlife Trust, August 2005).

In addition to national or provincial legislation, the hunter and wildlife producer associations which exist in South Africa lay down certain codes of conduct which they expect their members to adhere to. Although they generally lack the teeth to enforce these codes of conduct, the effects of peer pressure should not be underestimated (Anon., CHASA *in litt* to Department of Environmental Affairs, August 2005).

Monitoring

The responsibility for regulation of the hunting industry falls to the provincial nature

conservation bodies. These duties include: determining hunting seasons, hunting fees, issuing permits and record keeping. In the past, organisations such as SAPHCOM provided the opportunity to facilitate this broader consultation (Barnett and Patterson, undated) and such a structure needs to be reestablished (Hamman, *et al.*, 2005).

Hunt returns – these returns should be completed after each hunt and returned to the relevant provincial nature conservation department at the end of the hunt or hunting season. They provide information such as the number and species hunted, trophies kept, number of hunters and hunts conducted and the hunters country of residence (M. Badenhorst, Northern Cape Nature Conservation Service, *in litt* to TRAFFIC East/Southern Africa, July 2001; L. Lotter, Gauteng Department of Agriculture, Conservation and Environment, *in litt* to TRAFFIC East/Southern Africa, July 2001; M. Fryer, pers. comm., 2001; D. Hignett, pers. comm., 2001; S. Hughes, pers. comm., 2001; D. Swart, pers. comm., 2001). Until recently, the returns were submitted to SAPHCOM via the provincial conservation authorities for compilation and analysis (although the level of compliance differs from province to province with Limpopo being the weakest (D. von Wielligh, pers. comm., 2001).

Apart from record keeping, hunt returns serve various purposes depending on the province. They may serve as an export permit application for the trophies and proof of experience for renewing professional hunter permits (Limpopo, North West, Northern Cape, Western Cape) and upgrading from ordinary to dangerous wildlife. It is, therefore, in both the client and the professional hunters interests to submit the returns. Some provinces (Eastern Cape, Gauteng, North West) may issue penalties in the form of fines or periods of imprisonment for failure to submit hunt returns (Barnett and Patterson, undated).

Hunting permit fees – provinces differ in their fee strategies with some charging per proclamation (a permit which allows one hunter/client to hunt all the species listed thereon) and others per animal hunted. This revenue is not directed back into conservation, either for projects or for cost-recovery, but is instead put back into general provincial income accounts. Provinces whose nature conservation departments are structured as boards, or are parastatal, are, however, able to use this income in a cost recovery manner (KwaZulu-Natal, Western Cape) (Barnett and Patterson, undated).

Hunting fees remained relatively constant until the late 1990s when they were revised. This revision was met with mixed opinion with some supporting the increase, some feeling it was excessive, some feeling that costs should be related to cost recovery and not the rarity of the species in question and that there should be more uniformity in fees charged between the provinces (G. Davies, pers. comm., 2001). Fees are also charged for certain other permits required by provincial legislation and the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) (Barnett and Patterson, undated).

Tourism/conservation fees – these are levied on the hunting permit (Western Cape) or on the gate entry fees of reserves (KwaZulu-Natal). By putting the levy on the gate entry fee, revenue is not obtained from hunters hunting on private land. Thus, the revenue received is not maximized (Barnett and Patterson, undated).

Operating fees – the licenses needed to operate either as a professional hunter or a hunting outfitter are managed at a provincial level. This is considered a disadvantage by outfitters operating in more than one province (G. Davies, pers. comm., 2001).

Permit issuance – permits for hunting, operating, importing, exporting and transporting wildlife, amongst others, are issued by provincial government. The standard of permit issuance, as well as the time taken to issue a permit, is generally considered poor. Attempts have been made by the provincial governments to improve the training of their permit staff and guidelines have been set as to how long a permit should take to issue (Barnett and Patterson, undated).

Quota setting

National quotas administered by DEAT currently only exist for leopard *Panthera pardus*, elephant and black rhinoceros *Diceros bicornis*. These quotas have been established pursuant to CITES and require some form of reporting through the CITES Secretariat to the Parties of the Convention. For CITES quota species, there are tagging and marking protocols to govern the export of legitimate trophies. In this regard, South Africa currently allows the export of up to 75 trophies or skins of leopard (although the actual quota under CITES is 150), 200 tusks as hunting trophies (from 100 elephant) and five hunting trophies from adult male black rhinoceros. DEAT divides these quotas amongst provinces with the number staying roughly the same each year (Barnett and Patterson, undated).

The national leopard quota has come under the spotlight recently. At the 13th meeting of the Conference of the Parties to CITES, South Africa's proposal to increase the leopard quota from 75 to 150 was accepted. This was done in an attempt to meet the apparent increase in demand for leopard trophies and to place a value on so-called problem animals. It was hoped that by increasing hunting options for leopard, there would be greater incentive to tolerate their presence (Daly *et al.*, 2005). Unfortunately the population estimate used by DEAT for the species was misunderstood and inflated, resulting in a potentially unsustainable off-take rate. Until this matter is resolved pending further investigation, DEAT has suspended input of the increased quota.

Once allocated to the provincial conservation authorities, quotas for black rhinoceros, leopard and elephant are distributed by the provinces through draws (KwaZulu-Natal), application and evaluation (Limpopo). Follow up investigations are carried out by the provincial authority to ensure that leopard are present on the property (KwaZulu-Natal),

that quotas are distributed fairly (KwaZulu-Natal). Where permits are not used, the tag number may be reallocated (Limpopo) (Barnett and Patterson, undated).

Where a province does not use their quota, those animals are not hunted. In other words, unused quotas are not redistributed to other provinces. Unused quotas may also not be transferred to the following year. This is a potential loss of revenue and this underutilization needs to be investigated and addressed.

The provincial authorities do not issue quotas for other species. As most of the wildlife is privately owned, responsibility for establishing quotas has been devolved to the individual owner on the basis that it is the owners responsibility to employ sound business practices such as not harvesting all the wildlife on his/her property. This strategy has opened the door for put-and-take management methods. Again, the issue of whether wildlife production should fall under agriculture or conservation is raised as it directly affects the continuation of such practices.

Enforcement

The enforcement of hunting is done at the provincial level in terms of the provincial legislation. There are mixed opinions between the provinces regarding the capacity to do this, with some considering themselves as having sufficient capacity and others not (W. Boing, Free State Department of Tourism, Environmental and Economic Affairs, *in litt* to TRAFFIC East/Southern Africa, August 2005; S. de Jager, Ezemvelo KZN Wildlife, *in litt* to TRAFFIC East/Southern Africa, August 2005; R. de Lange, Mpumalanga Parks Board, *in litt* to TRAFFIC East/Southern Africa, July 2005; M. Jonk, Northern Cape Department of Tourism, Environment and Conservation, *in litt* to TRAFFIC East/Southern Africa, August 2005; L. Lotter, Gauteng Department Agriculture, Conservation and Environment, *in litt* to TRAFFIC East/Southern Africa, August 2005; J. Pienaar, Eastern Cape Department of Economic Affairs, Environment and Tourism, *in litt* to TRAFFIC East/Southern Africa, July 2005; H. Stadler, CapeNature, *in litt* to TRAFFIC East/Southern Africa, July 2005), but anecdotal information from the public indicates hunting activities are not adequately enforced (L. Joubert, SanWild Wildlife Trust, pers comm., August 2005; G. Verdoorn, SAHGCA, *in litt* to Department of Environmental Affairs and Tourism, June 2005). Provincial nature conservation authorities are generally understaffed and incapacitated.

Adherence to codes of conduct as laid down by the hunting management bodies is generally voluntary and few have the teeth to take action against members who do not comply with codes of conduct. PHASA has, at its own expense, taken action against certain members who were considered to be acting outside of PHASA's Code of Conduct (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005).

5.3.6 The Hunting Outfitter and Professional Hunter

Hunting outfitters must be licensed in terms of provincial nature conservation legislation.

In an attempt to ensure high levels of service, and a good understanding of the industry, licensing requires that the person has passed the professional hunting exam, has at least three years of experience and can show that he/she has the necessary facilities and infrastructure (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005). The hunting outfitter may then either act as the professional hunter or may employ one or more professional hunters to conduct the actual hunts. The outfitter must enter into written agreement with his/her client regarding place of hunt, permit details, animals (sex and species), facilities provided, and tariffs. Support staff such as skinners, trackers and professional hunter must also be provided. In addition, taxidermy services may be offered (Barnett and Patterson, undated).

In terms of the provincial nature conservation ordinances and acts, all hunts by foreign nationals, regardless on what type of land they take place, must be supervised by a professional hunter. To qualify as a professional hunters, the applicant must successfully complete theoretical and practical components during his/her training. He/she must be registered in each province in which he/she hunts. The professional hunter receives financial reward for his/her efforts. (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005).

RESOURCES

South Africa is known for its wildlife and vast natural resources. In 2004, the main contributions to the Gross Domestic Product (GDP) were by the following sectors: Finance, Real Estate and Business Service (18.6%), Manufacturing (16.4%), Wholesale and Retail Trade, Hotels and Restaurants (13.9%) and General Government Services (13%). Agriculture, Forestry and Fishing contributed only 2.6% to the GDP. Its importance, however, lies in the fact a large portion of this income is foreign revenue (Barnett and Patterson, undated). Interestingly, Krug (2001) found that nature tourism ranked amongst the top three contributors to GDP in other eastern and southern African countries.

Wildlife utilized

South Africa offers a diverse range of species to hunt (**Annex 1**), with over 60 indigenous mammals being available, including the much sought after “big five” (lion *Panthera leo*, leopard, rhinoceros, buffalo and elephant). In addition, a range of birds such as ducks, geese, francolin, guineafowl, pigeons and doves, ostrich, bustards and korhaans, and snipe may also be hunted. **Table 2** presents a list of species hunted during the 2003/2004 hunting season by foreign hunters. Of the top 20 hunted species, by number hunted, 19 are not listed on the Appendices of CITES which means that the regulation governing their international trade stems entirely from South African legislation. It is imperative, therefore, that this legislation is adequate.

Provinces have the authority to restrict the hunting of species. For example, the Western

Cape does not allow hunting of species for which no hunting season has been declared (H. Stadler, CapeNature, *in litt* to TRAFFIC East/Southern Africa, July 2005) and Northern Cape does not allow the hunting of leopard, rhinoceros, elephant or lion (M. Jonk, Northern Cape Department of Tourism, Environment and Conservation, *in litt* to TRAFFIC East/Southern Africa, August 2005). In the Western Cape, Cape mountain zebra *Equus zebra zebra*, bontebok *Damaliscus dorcas*, buffalo, Cape grysbok *Raphicerus melanotis*, steenbuck *Raphicerus campestris* and klipspringer *Oreotragus oreotragus* are examples of such species (H. Stadler, CapeNature, *in litt* to TRAFFIC East/Southern Africa, July 2005), although they can be hunted elsewhere in South Africa.

The revenue in terms of hunting fees obtained from the species listed in **Table 2** amounted to USD40.7 million during the 2003/2004 hunting season. Impala *Aepyceros melampus* was the most hunted species (7018 animals), white rhinoceros *Ceratotherium simum* was the most valuable (USD25 575 each), while kudu *Tragelaphus strepsiceros* raised the most income (5431 animals x USD980 each = USD5.3 million) (PHASA, *in litt* to TRAFFIC East/Southern Africa, September 2005). Historically, Limpopo has been the main hunting destination in South Africa but this is fast being surpassed by Eastern Cape (van Niekerk, undated). Gauteng forms the central hub through which most trophies are exported (Barnett and Patterson, undated).

A host of alien species are also on offer in South Africa, including lechwe *Kobus spp.*, American bison *Bison bison*, Russian boar *Sus scrofa*, Asian water buffalo *Bubalus arnee* and Barbary sheep *Ammotragus lervia*. Although these species generate substantial income for some farmers (J. Pienaar, Eastern Cape Department of Economic Affairs, Environment and Tourism, *in litt* to TRAFFIC East/Southern Africa, July 2005; van Niekerk, undated), the hunting of aliens is generally considered contrary to the interests of conservation and in contravention of the Biodiversity Act (Hamman *et al.*, 2001). Some of the alien species available for hunting, for example the scimitar-horned oryx *Oryx dammah* and addax *Addax nasomaculatus* are classified as Extinct in the Wild and Critically Endangered respectively. Populations outside the natural range of the species have the potential to contribute to the gene pool and reintroduction programmes but, in practice, this does not happen. The value of having these species in South Africa and on offer is questionable (Damm, 2005; G. Damm, pers comm., 2005).

Table 2

Number of animals hunted by foreign hunters during the 2003/2004 hunting season per province, and trophy fees generated in USD

Species	WCE	CNC	FSK	ZKN	WN	WGL	LIM	MPT	TOTAL	Avg Value	Total Value	USD	Mammals
Indigenous	Aardvark	10000	1010375225	Aardwolf	01300000301665010	400	Baboon	1964128171125326710026	700	Badger,			
	Honey	0000006063001	800	Blesbuck	2153163368526135362710934	3303501	515	500	Bontebok	51002014010001401	430200		
	200	Buffalo	01111714194108517910	8571	943	403	Bushbaby	0200000002100200	Bushbuck	0939923129212504201	6478401	383	
	480	Bushpig	0740020101421024735086	450	Caracal	0244222612231180346633219	018	Cat,	African Wild	0401602080301855			
	550	Civet	0000000110111001	100	Duiker,	Blue	0890010017010760064	200	Duiker,	Common	35928060107702347101	271250317	
	750	Duiker,	Red	00005300102651	20078	000	Eland	2215144823814613269149231	7001	569	100	Elephant	000021001813119
	882	Fox,	Bat-eared	1222007010331003	300	Fox,	Cape	012442000105952030	680	Gemsbok	68944382724231720920132	9221	2003
	506	400	Genet,	Large-spotted	0000100304150600	Genet,	Small-spotted	03206050132581136	554	Giraffe	0569191404651042	583268	
	632	Grysbok	01250000340159650103	350	Hare,	Scrub	010071000925225	Hartebeest,	Red	4429185183631993792261	2188501	035	

300Hippopotamus0100100010121 50018 000Hyaena, Brown00000120170292 00058 000Hyaena, Spotted0000000110111 50016
500Hyrax, Rock0172280011040502 000Impala31 506377258585402703 6881297 0183002 105 400Jackal, Black-
backed15823312898156436310036 300Jackal, Side-striped0000000250251002 500Klipspringer531730404529770067 900Kudu21
436281131213286232 997625 4319805 322 380Leopard00002111274455 545249 525Lion013700134036019017 5003 325
000Mongoose, White-tailed00001000012525Mongoose, Yellow020003000525125Nyala02392027320527239229262 1912 028
866Oribi0350360037541 35072 900Polecat, Striped02000000132575Porcupine01928770150581005
800Reedbuck01552617660157250850212 500Reedbuck, Mountain16681191299317555281 115507565 305Rhebuck,
Grey5151122290028209650135 850Rhinoceros, White052620211236025 5751 534 500Roan0220030401112 750140
250Sable026110130224587 700446 600Serval0002141000261503 900Springbuck211 953959844674025131434 3712501 092
750Springhare038210022014086353 010Squirrel, Ground00740200003125775Steenbuck2371197711711112181989250247
250Suni00008000191 30011 700Surricat00103000101425350Tsessebe005409060241 58037 920Warthog0972226114454217203
397575 4572501 364 250Waterbuck011251634610311996121 3941 7002 369 800Wild Dog, African00100000012 0002
000Wildebeest, Black37162183978616344128491 8047871 419 748Wildebeest, Blue353123815517626823690482 1327501 599
000Zebra, Burchell's046213316613217529681331 8119001 629 900Zebra, Cape Mountain01000000011 5001 500**Mammals -**
AlienAddax00100000017 0007 000Deer, Fallow014312370200119535068 250Deer, Hog02000000026001 200Eland,
Livingstone00700000073 00021 000Goat, Angora02000000021020Lechwe, Red012720250120181932 400463 200Oryx,
Arabian00100000017 0007 000Oryx, Scimitar-horned058705000251 35033 750Sheep, Barbary0216500000321 00032 000Tahr,
Himalayan0120000000122 00024 000Zebra, Hartmann012380006801001 200120 000**Mammals – Hybrids/Colour morphs**
Blesbuck, White01417101837000267600160 200Springbuck, Black0419100010000520431224 120Springbuck,
White015941000000200650130 000**Birds**Dove, Cape Turtle47010115264010329258 225Dove, Laughing070305114000327258
175Duck, African Black000040000425100Duck, Knob-billed00010000012525Duck, Maccua00002000022550Duck, Red-
billed00002000022550Duck, White-backed00002000022550Duck, White-faced020330000825100Duck, Yellow-
billed01101336000060251 500Francolin, Greywing0250330000058251 450Francolin, Natal00062403310343258 575Francolin,
Orange River000600000625150Francolin, Swainsons00023293015070251 750Francolin, Shelley00001000012525Goose,
Egyptian427015223024095252 375Goose, Spurwing112044180011086252 150Guineafowl72101124080100198254 950Guineafowl,
Helmeted000080056064251 600Ostrich03956269333191186550102 300Pigeon, Red-necked00001000012525Pigeon, Rock19701
0231553840501 5932539 825Pochard, Southern00002000022550Quail00001000012525Shelduck,
African21608100002725675Shoveler, Cape050020000725175Snipe, Ethiopian00002000022550Teal, Red-
billed01508130002725675Teal, Hollard00001000012525Other00100000601625400**Reptiles**Adder,
Puff030001010525125Crocodile0000240153244,600110 400**Total10816 0174 8455 7173 7384 33543917 50275253 45340 691 943**
SOURCE: PHASA, *in litt* to TRAFFIC East/Southern Africa, September 2005
Note: average value is based on average price of species when offered for hunting
Key: WC – Western Cape Province; EC – Eastern Cape Province; NC – Northern Cape Province; FS – Free State Province; KZN –
KwaZulu-Natal Province; NW – North West Province; GT – Gauteng Province; LIM – Limpopo Province; MP – Mpumalanga Province

Hybrids, such as the so-called red wildebeest (a hybrid between black and blue wildebeest) are also available for hunting (Anon., 2005f; Hamman, *et al.*, 2005). This hybrid resulted from a slight overlap in areas of their range, although blue wildebeest *Connochaetes taurinus* prefer savannas and black wildebeest *Connochaetes gnou* prefer pure grasslands. The fencing of farms has forced these two species to live together and, although recognized as two separate species, they are still able to cross-breed. Hybrids displaying physical and/or behavioural characteristics of both species have been found. Unlike most hybrids, these animals are fertile and, once mated back to a pure-bred animal, the off-spring are almost impossible to identify. While these so called red wildebeest appeal to some hunters, hybridisation has the potential to cause the extinction of both black and blue Wildebeest (Anon., 2005f). This is not in line with the objectives of the Biodiversity Act which promotes the maintenance of biodiversity (Anon., 2005f; D. Swart, North West Department of Agriculture, Conservation, Environment and Tourism, *in litt* to Panel of Experts, August 2005).

Similarly, animals displaying colour mutations are also desired by some species and are in some cases, specifically bred for. These animals do not contribute to conservation goals (Damm, 2005).

A survey of wildlife production units in Limpopo revealed that annual wildlife cropping rates in the province were 28.1% for blesbuck *Damaliscus pygargus* and 10% for nyala *Tragelaphus angasii*. An average of 20.3% of available wildlife is cropped annually and

this figure is considered sustainable (van der Waal and Dekker, 2000).

Tourists

Since democracy, South Africa has embarked on a massive tourism campaign. This campaign has been carried out with certain principles in mind, the overall vision being to create 'a prosperous and equitable society living in harmony with our natural resources'. DEAT further states in their Mission that they needed to create 'conditions for sustainable tourism growth and development', promote 'the conservation and sustainable development of our natural resources, and to protect and improve 'the quality and safety of the environment' (Anon., 2003a).

South Africa has used its wealth of biodiversity as a cornerstone of their environmental tourism programmes and it has become the fastest growing sector of the economy. The year 2003 saw 6.5 million people visit South Africa, bringing with them ZAR53.9 billion in foreign currency. Interestingly, 69% of the 1.15 million tourists that visited South Africa during the first eight months of 2004 were from other African countries. Of the remainder, 18% were from Europe (predominantly Germany, which is well known for its hunters, France, the Netherlands and Italy) and only 3.8% from the United States of America (USA) (Anon., 2005g).

Land

Historically, government has supported the development of land, referring to 'improved' and 'unimproved' land in its policies and reports. Land in its natural state, was not seen as an opportunity to preserve crucial ecosystems and biodiversity, but rather as a waste. Tax benefits supported the development of such land. Decisions on how best to use land are often based on short-term economic grounds rather than long-term benefits such as the conservation of biodiversity. Conservation has, thus, had to compete with developments such as housing schemes, railways and agriculture (Damm, 2002; Krug, 2001).

Land ownership in South Africa is predominantly private (73%) (**Table 3**), followed by communal (13%) (Damm, 2002), with the remaining 14% owned either by the State, provincial or municipal authorities. Land is further classified as rural, urban, recreational or non-developed. Privately owned wildlife production units and reserves are not yet seen as a class on their own and are often lumped into rural or agricultural land making it hard to determine the exact amount of land available to wildlife.

In a survey of wildlife production units in Limpopo, 30% of the respondents said that they farm wildlife primarily for their own pleasure and 27% saw it as their individual contribution to nature conservation. Of the respondents, 24% were not financially dependent on the income from the wildlife production unit (van der Waal and Dekker, 2000).

There is some disagreement regarding the number of wildlife production units in South

Africa. This disagreement stems from the lack of a legal definition and the difficulty of gathering such information. The most widely accepted figure is 9,000 (Damm, 2005) although authors seldom state how many of those have exemption status (Table 3). Eloff (2002) listed just over 5000 wildlife production units as having exemption status in 2000. He/she further noted a 5.6% increase in the size of exempted farms between 1993 and 2001. The value of the investment made by the private sector to the wildlife industry was estimated to be around ZAR16.5 million (Eloff, 2002).

Table 3

The number and size of wildlife production units with exemption in August 2000

Province **No. of exempted wildlife production units** **% of total number of production units** **Total area of exempted wildlife production units** **% of total area** **Average size of exempted farms**

Free State	180	3.56	147 743	1.425	820.79
Limpopo	2 482	49.04	3 325 652	32.088	1 339.91
North West	340	6.72	364 935	3.521	1 073.34
Mpumalanga	205	4.05	276 016	2.663	1 346.42
Gauteng	72	1.42	82 076	0.792	1 139.94
KwaZulu-Natal	90	1.78	168 841	1.629	1 876.01
Eastern Cape	624	12.33	881 633	8.507	1 412.87
Northern Cape	986	19.48	4 852 053	46.816	4 920.95
Western Cape	82	1.62	265 205	2.559	3 234.21
Total	5 061	100.00	10 364 154	100.000	2 047.85

SOURCE: Eloff, 2002

BENEFITS

One of the strongest justifications for hunting is the argument that it is good for conservation. In this regard, the money derived through trophy hunting creates incentives to conserve wildlife in a vast range of differing habitats throughout the country (Hamman *et al.*, 2005). Consequently, land that might otherwise be used for agriculture or other purposes has remained in a relatively undeveloped state to support wildlife due to the revenue generated by hunters. Further, the hunting industry provides employment in areas where other land use options are not viable or have limited application. This is particularly true where pressures on natural lands increase, especially in developing countries (Krug, 2001). Such arguments are criticized by some from the standpoint that photographic safaris also have the potential to raise revenue based on wildlife (although the level of use is higher, far greater investment in infrastructure and services is required and the aesthetic requirements of the area are more stringent. It is also argued that where hunting takes place, the area is unsuitable for wildlife viewing as the animals are not habituated) and that conservation is merely a by-product of these commercial enterprises rather than the driving aim (Anon., SA Game Farmers Association, *in litt* to Department of Environmental Affairs and Tourism, August 2005).

The benefits offered by the hunting industry include:

Employment opportunities – The direct employment opportunities created by the hunting industry was estimated to be between 5000 and 6000 in 2000. The employment opportunities created by secondary industries is estimated to be in the region of 63 000 jobs. This excludes the jobs created within the tourism, gun smithery, knife making and food industries that are not directly linked to sport hunting (Anon., 2000);

Tips – The majority of hunters, be they residents or foreign nationals, tip staff who have offered assistance during the safari. In fact, such tips can be substantial (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005);

Revenue for conservation authorities – The provincial nature conservation authorities generate income through the auctioning or tendering of hunting concessions, gate entry fees, accommodation services provided and the issuing of provincial and CITES permits. The fees charged for these various aspects differ from province to province and, in most cases, the revenue is deposited into central coffers and does not get allocated directly to conservation activities. The provinces which have Boards, or which are parastatal, have more control over how this revenue can be spent;

Education, training and capacity building – To participate competitively in the sport hunting industry, various skills and knowledge are required. Trophy hunting in the context of government or communal land concessions has often led to specific training opportunities for staff or community members. One of the best examples of this type of assistance is the agreement reached by the Makuleke community in conjunction with South African National Parks (SANParks). In this case, the community has received significant assistance from SANParks and has raised an estimated ZAR3 million through trophy hunting which has been used to develop tourism infrastructure (P. Khosa, pers comm., 2005). The majority of the hunting associations, often in conjunction with provincial nature conservation departments, provide training opportunities such as courses in professional hunting, wildlife tracking, skinning and for wildlife scouts;

Conservation levies – Institutions such as PHASA have implemented a Conservation Fund. Levies are placed on each trophy hunted and this money is used to conduct training programmes and various conservation projects (G. Davies, pers. comm., 2001;). Certain members of hunting associations give their time on a voluntary basis to educational and conservation projects (A. Kitshoff, KZN Hunting and Conservation Association, *in litt* to TRAFFIC East/Southern Africa, August 2005);

Revenue for communal landowners – Ezemvelo KZN Wildlife charges a levy which is used for social development projects in communities surrounding the reserves. This fee is built into their gate entry fees;

Services – Some private sector wildlife producers provide services such as schools, clinics and limited transport facilities for their staff. The provision of these services is done on an *ad hoc* basis with the wildlife production unit owners not being compelled to provide any of these services;

Meat – Some communities benefit from the meat of hunted animals. The meat may either be provided free of charge, be part of the staff salary package, or sold at a low rate to surrounding community members. Again, this is carried out in an *ad hoc* manner with no formal obligation on the part of the provider; and,

Eco-tourism opportunities – To offer the hunter a more complete experience, activities such as visits to local communities are arranged by the hunting outfitter. Here hunters are able to watch or partake in activities such as tribal dancing, buy curios and learn something of local culture. Income generating opportunities are also provided in this way.

SECONDARY INDUSTRIES

The hunting industry would not be a viable industry without the support of a variety of related subsidiary industries. These industries may be equally dependent on the hunting industry for their survival. Subsidiary industries include taxidermy, wildlife breeding, meat sales, sale and production of guns and bullets, knife makers and the tourism industry.

Wildlife farming

Since the deregulation of the agricultural sector in early 1990s, farmers have experienced a reduction in profits (this is largely due to reduced subsidies and the loss of political leverage) (Anon., undated c). This, coupled with global warming, stock theft, poor farming practices, land claims and new labour laws, have resulted in many farms switching from domestic livestock to wildlife (Anon., undated c). This is particularly true in areas where agricultural activities are not lucrative, the so-called marginal areas in the more arid parts of the country (du P. Bothma, 2005; Krug, 2001). Wildlife production units vary in size and, in areas where the average farm size is small, farmers have negotiated for the establishment of conservancies, whereby various farms aggregate into larger, more manageable management units (Anon., undated c). Wildlife production units are fenced-in, profit-seeking operations which are essentially no different in their economic objectives to operations which farm domestic livestock.

Wildlife production presents farmers with four opportunities to earn income: i) sale of hunts and wildlife meat; ii) sale of live wildlife at auctions; iii) processing of animal products; and, iv) wildlife lodge, conference facilities and related services (Anon., SA Game Farmers Association, *in litt* to Department of Environmental Affairs, August 2005). The use of multi-species systems are generally more profitable and ecologically viable than single-species systems (Krug, 2001). Employment opportunities are created at all levels and, of the 600 000 people employed in the tourism industry (Anon., undated c), around 60 000 can be linked to ecotourism and the hunting industry.

The upfront costs of wildlife production are capital-intensive. The price of land has increased considerably during recent years. In the lowveld region of Limpopo and Mpumalanga, the value of property has increased by up to 2500% over the last 20 years (Lambrechts, 1995, in Krug, 2001). It is estimated that the initial development is usually at least twice the cost of the land itself. In this regard, capital outlays are spent primarily on fencing, facilities (wildlife handling facilities, water provision, lookouts and roads), infrastructure (outbuildings, staff quarters), vehicles and equipment, and wildlife for stocking purposes. The species of wildlife on a farm can be directly correlated to its

success. Optimal stocking not only leads to more holistic systems requiring less management, but are also more appealing to visitors. Farms with some or all of the big five are often more popular than farms with only plains game (Anon., undated c).

The income generated through the sale of live wildlife is presented in **Table 4**. Species such as sable *Hippotragus niger*, lion, rhinoceros and roan *Hippotragus equinus* are popular and obtain good prices making them more lucrative for the farmer. Emphasis is then placed on breeding these species, possibly to the detriment of their genetic viability.

Table 4

Total revenue raised at wildlife auctions for the period 1991 to 2001

Year	Number of wildlife sold	% change	Turnover (in Rand, excl. VAT)	% change
1991	8 292		8 999 871	
1992	9 546	+15.00	10 859 969	+20.66
1993	11 449	+19.93	11 732 596	+8.04
1994	11 096	-3.08	11 705 605	-0.23
1995	9 171	-17.35	14 335 894	+22.47
1996	11 340	+23.65	26 559 557	+85.26
1997	12 077	+6.50	28 526 052	+7.40
1998	14 354	+18.85	40 017 946	+40.29
1999	15 455	+7.67	53 705 823	+34.20
2000	17 702	+14.54	62 960 451	+17.23
2001	17 282	-2.37	87 000 473	+38.18

SOURCE: Eloff, 2002

Taxidermy

There are over 30 taxidermy companies in South Africa although only a few of these operate on a large scale. These companies were responsible for generating an estimated ZAR10 million from foreign nationals in 2000 (Anon., 2000) and ZAR50 million for South African residents in 2005 (Damm, 2005).

TASA holds annual conventions where taxidermy competitions are held, information is shared and knowledge is gained. TASA classifies its members into categories and as at February 2005, they had 36 Novice members, 21 Professional members, one Probationary/Novice member, four Associate Trade members and two Trade members. TASA has developed a programme which provides its members with an opportunity to develop skills and competencies but this programme is voluntary. (Anon., 2005h). Currently, there is no nationally recognized qualification for taxidermy. Some taxidermists offer in-house training and recognition to their staff however (N. Kretzschmar, pers. comm., 2001).

The taxidermy industry in Africa has a mixed reputation, and South Africa is no exception. Some regard the quality of trophies to be good to excellent while others find the workmanship poor and prefer to take their trophies back to their home country for processing (G. Davies, pers comm., 2001). The time taken to process trophies can also be very lengthy. Taxidermists themselves have a number of concerns. These include: i) illegal

or substandard operations; ii) health and veterinary concerns, particularly with regards to dip-and-ship operations; iii) lost or unmaximised revenue; and, iv) irregular implementation of the legislation (Barnett and Patterson, undated).

The inspection of shipments seems to be irregular with identification skills of the officials conducting the inspection often poor. It also appears that only shipments from larger taxidermy operations are inspected, while those of taxidermists offering dip-and-ship services are not. Reports have been received of people walking onto airplanes carrying their trophies as personal effects without the necessary veterinary and nature conservation permits. While the dip-and-ship method does allow the hunter to take his/her trophy home immediately, an advantage that appeals to some hunters, it should also be noted that the risk of spreading disease should the processes not be conducted properly, is high. The spread of disease to the USA or Europe would put South Africa in a very bad light and has the potential to shut down the industry as imports are refused (R. Kretzschmar, pers. comm., 2001).

The export of unprocessed trophies, or trophies with minimal treatment, means a loss of revenue for the industry. **Table 5** provides a list of taxidermy prices and it can be easily seen that the costs of tanning a skin is considerably lower than that of a processed trophy. American taxidermists are known to charge considerably more for African trophies and some have considered setting up offices in South Africa (R. Kretzschmar, pers. comm., 2001).

Table 5

Average taxidermy prices for 2005 in ZAR

Species	Shoulder mount	Pedestal mount	Half mount	Full mount	Rug mount	Rug Head mount	Felt Lined						
Rug	Tan Flat skin	Tan Back Skin	Horn/skull on shield	Skull									
bleach	Baboon	400.04	95595815.0	-----	1359060110.055	Blesbuck	400.0	-----	1 925.0	-----	1157045135.0		
Buffalo	732.59	651 2959	575.0	-----	260150197.590	Bushbuck	397.55	75	---1				
	457.0	-----	1157045110.055	Caracal/Serval	-----	500.0330	-----	60.095	Cheetah	640.0	-----	1	
	925.0	---890310215115135.0	---Civet	295.0	-----	575.0	---480115704590.0	---Crocodyle	495.0	-----	6/cm, 150 sq		
	ft8503/cm	-----	195.0135	Deer, Fallow	500.0	-----	1 925.0	-----	1159060135.0	---			
	Duiker	280.0	-----	607.5	-----	70452052.240	Eland	1 465.0965	---5 295.0	-----	340275150165.090		
	Elephant	5	655.0	---9 500	Poa	-----	820.0275	Gemsbok	1 115.0	-----	3		
	485.0	-----	250205115127.570	Genet	-----	355.0	---28560452070.0	---Giraffe	1 025.01 1553 5007				
	920.0	-----	480232.5170	Grysbok	265.0	-----	395.0	-----	60.040	Hartebeest	575.0	-----	2
	615.0	-----	215150100150.0	---Hippopotamus	1 637.5	-----	Poa	-----	335.0170	Hyaena	482.5	-----	1
	192.557569518511580127.575	Impala	387.55	75	---1								
	437.5	-----	1006045100.055	Jackal	250.0	-----	507.530050080604580.040	Klipspringer	290.0	-----	607.5	-----	10
	0604580.040	Kudu	567.5745	---3 780.0	-----	250195115160.075	Lechwe	535.0	-----	2			
	585.0	-----	18513590150.0	---Leopard	552.5	---8801 777.5650960310215135127.575	Lion	740.0	---1 3002				
	437.58501 265345260150175.090	Lynx	315.0	-----	575.0	---5001007045100.0	---						
	Monkey	295.0	-----	640.0	-----	80452090.0	---Nyala	500.0	-----	1			
	917.5	-----	20513590117.255	Oribi	235.0	-----	60.040	Ostrich	640.0	-----	2 585.0	-----	20/sq
	ft	-----	Reedbuck, Common	497.5	-----	2 325.0	-----	1157045110.055	Reedbuck, Mountain	315.0	-----	1	
	310.0	-----	1006045100.0	---Rhebuck, Grey	260.0	-----	1 140.0	-----	1001006090.0	---Rhinceros	1 925.0	-----	13
	060.0	-----	20/sq ft	---410.0	---Roan	640.0	-----	4 060.0	-----	250195115195.0	---		
	Sable	567.5745	---367.5	-----	250195115152.575	Sitatunga	575.0	-----	2 615.0	-----	250195115150.0	---	
	Springbuck	315.0	-----	1 455.0	-----	1006045100.0	---						
	Steenbuck	280.0	-----	597.5	-----	80452065.060	Tsessebe	515.0	-----	2			
	615.0	-----	21515090120.060	Warthog	390.0	-----	1 320.0	-----	7045150.0	---Waterbuck	567.5745	---3	
	047.5	-----	250195115137.575	Wilbebeest, Blue	557.5745	---3 925.0	-----	250215135137.575	Wilbebeest,				
	Black	235.0745	---3 485.0	-----	250215135137.575	Wild Pig/							
	Bushpig	422.5	-----	847.5400	-----	7045126.275	Zebra	547.5710	---3 075.0	-----	390320195185.075		
	Small	mammals (genet size)	-----	275.0200	-----	40.025	Medium mammals (civet size)	-----	495.0275	-----	60.040		

SOURCE: Various internet sites

Meat sales

Currently, there are three companies exporting wildlife meat from South Africa. Although this industry used to be larger, especially during the outbreak of Bovine Spongiform Encephalopathy (Mad Cow Disease) in the UK in 2001, the strengthening rand reduced the viability of this option for wildlife producers. Of the three companies currently exporting wildlife meat, only one has a sales team overseas. This team goes to various conventions and markets to promote the product. Overseas, wildlife meat is seen as an exotic meat and is sold almost exclusively to upmarket hotels, delicatessens and restaurants (P. Flack, pers comm., August 2005). **Table 6** lists the species and numbers of wildlife harvested commercially for their meat.

Table 6

Species and numbers of wildlife harvested commercially for wildlife meat production for the period 2002 to 2004

Species	2002		2003		2004	
	Number	Tonnage*	Number	Tonnage*	Number	Tonnage*
Blesbuck	811	29 755.4	31	1 002.3	1 379	49 241.2
Bushbuck	6	190.4	1	32.4	0	0.0
Deer, Fallow	51	1 519.4	1	33.4	65	1 733.2
Duiker	0	0.0	1	7.6	0	0.0
Eland	14	3 282.4	0	0.0	82	16 343.5
Gemsbok	29	2 491.2	7	820.0	139	13 537.9
Impala	117	3 616.2	28	794.6	169	4 296.1
Kudu	733	64 572.6	256	21 155.2	646	51 869.7
Reedbuck	46	681.3	20	217.6	1	9.4
Springbuck	19 252	287 956.6	25 133	322 030.0	20 664	307 374.0
Wildebeest, Black	285	22 460.8	0		222	18 744.6
Wildebeest, Blue	29	3 005.0	1	72.7	0	0.0
Zebra	84	14 240.2	337	64 914.6	88	16 633.4
Total	21 457	433 771.5	25 816	411 080.4	23 455	479 783.0

* Tonnage of the animals comprises the carcass and the skin
 SOURCE: P. Flack, *in litt* to TRAFFIC East/Southern Africa, August 2005

The fact that the meat is considered exotic is both good, as high prices can be obtained and it is sought after, and bad, in that it is only available to a small sector of the market and is hard to promote (P. Flack, pers comm., August 2005).

The EU has stringent controls governing the handling of export wildlife meat. Requirements such as the meat having to be at one of only a few EU approved abattoir within 36 hours of being culled, and that culling teams must be registered with the State Veterinarian department, means that it is very difficult for the average wildlife producer to enter this market. Only a few suitable abattoirs exist and it is unlikely that more will be approved in the future. Animals such as springbuck *Antidorcas marsupialis* are more suited to this type of operation as they occur on open areas and are easy to harvest whereas impala live in woodland which makes it difficult for the culling team to operate (P. Flack, pers comm., August 2005).

Although the *Meat Safety Act 40 of 2000* was promulgated without input from the wildlife industry, consultation forums were soon established and input was made. Important points resulting from these meetings are: i) biltong hunters and own consumptions are excluded from the requirements of the Act; ii) the practical problems experienced by professional culling teams were dealt with; and, iii) wildlife production unit owners initiated a programme to process and sell wildlife meat to local butcheries in the municipalities of Tshwane, Greater Johannesburg, Sebideng and Mogale City (Steynberg, 2005).

Wildlife meat sold for human consumption needs to have been inspected by a meat inspector and have passed through an accredited abattoir. It appears that in KwaZulu-Natal, it is difficult to obtain this accreditation and that the fees charged for inspection of meat are too high. A charge of ZAR85 is levied on the inspection of impala which leaves little profit margin and incentive to pursue this line of income generation. Ezemvelo KZN Wildlife has spent around ZAR5 million upgrading abattoir facilities and are still battling to get accreditation (S. de Jager, pers comm., 2005).

On the whole, South Africans do not like wildlife meat considering it to be 'dry and gamey'. This is often related to the way in which the meat is harvested, for instance not bleeding it adequately, immediately freezing it, and inappropriate cooking methods, than the actual meat itself. (P. Flack, pers comm., August 2005).

Live sales

There are five methods used to trade live wildlife in South Africa: i) private sales; ii) public live auctions; iii) catalogue auctions; iv) the tender system (often use by municipalities, provincial and other State organisations); and, v) electronic auctions. The sale of indigenous wildlife by auction is unique to South Africa as most other countries do not allow the sale of indigenous wildlife (Ebedes, undated). The income derived from auctions varies wide by between regions depending on the species offered, transport, and type of sale, i.e. live sales or catalogue auctions.

From the first sale held in 1975 (du P. Bothma, 2005) this has developed into an important industry for the wildlife sector. Approximately 220 auctions are listed on the website of the Wildlife Ranching Association of South Africa and approximately 20 500 head of wildlife are sold annually (du P. Bothma, 2005; Anon., 2005i). Although recognized as a practical, legitimate and accepted method for trading wildlife, a number of criticisms have been made. The main ones being (Ebedes, undated):

Animals are kept in inadequate and unsatisfactory holding pens;

Incorrectly tranquilized animals are under constant stress

Injured and sick animals are offered for sale;

Animals are injured and/or die during transportation;

Animals are purchased by wildlife production unit owners with unsuitable habitats for the particular species; and,

Animals may be purchased from zoos and released onto veld – many of these animals die shortly after release as they have lost their natural immunity, are not familiar with the food and/or are not equipped to deal with the ‘wild’.

A brief description of each method, as well as its advantages and disadvantages is presented below:

Private sales allow the buyer and seller to agree on the price they want rather than to work through an auction process where the seller runs the risk of not realizing the price he wants. The animals are usually viewed beforehand although where a business relationship has been established, the animals may be purchased unsighted;

Public live auctions usually realize higher prices than catalogue sales as the buyer can see and inspect the actual animals, but places more stress on the animals themselves. Incorrect transport and handling techniques can jeopardize the survival of the animals. Although regulations are in place (for example, *Animals Protection Act 71 of 1962* and the provincial Ordinances and Acts), they are not always adhered to and compliance needs to be encouraged. A list of average prices obtained through live auctions is presented in **Table 7** while **Table 4** presents the total revenue raised at live sales;

Catalogue auctions have the advantage of being less stressful for the animals and less expensive for the seller who does not need to construct holding pens or feed the animals confined in the pens. Criticisms of this method includes the fact that misrepresentations are possible and disappointment may result from misunderstandings. Although they have a reputation for achieving lower prices, this no longer seems to be the case. Auction results available on the internet indicate that in 2005, buffalo have achieved prices of ZAR135 500 to ZAR147 500 on catalogue sales whereas live sales have only reached prices of ZAR80 000-124 318 (Anon., 2005j). This form of auction allows buyers to bid on animals at auctions he/she might have otherwise been unable to attend;

The *tender system* is used by government agencies who need to adhere to rigid fiscal procedures when selling off assets. The buyer may view the animals but has the disadvantage of not knowing how much the competition is bidding; and,

Electronic auctions are a fairly new concept. Buyers can view either digital photos or video footage of the animals for sale.

Table 7

Prices of wildlife sold on auction in 2004 and 2005 (IN USD)

Species 2004 Live Sale Average Price in USD 2004/2005 Males Live Sale Average Price in USD
Species 2004 Live Sale Average Price in USD 2004/2005 Males Live Sale Average Price in USD

Baboon	n/a	n/a	Lechwe, Kafue	n/a	n/a
Badger, Honey	n/a	n/a	Lechwe, Red	2 222	1 635
Blesbuck	118	n/a	Leopard	n/a	n/a
Blesbuck, White	178	151	Lion	n/a	n/a
Bontebok	1 475	n/a	Monkey, Blue	n/a	n/a
Buffalo, Cape	23 608	1 308	Nyala	1 031	1 430
Bushbuck	385	7 264	Oribi	793	n/a
Bushpig	428	569	Ostrich	189	n/a

Caracal	n/a	n/a	Porcupine	n/a	n/a
Cat, African Wild	159	n/a	Reedbuck, Common	701	n/a
Civet	n/a	n/a	Reedbuck, Mountain	202	n/a
Crocodile	n/a	n/a	Rhebuck, Grey	687	n/a
Deer, Fallow	n/a	n/a	Rhinoceros	17 881	11 526
Duiker, Blue	587	n/a	Roan	23 712	4 152
Duiker, Common	347	n/a	Sable	9 772	3 442
Duiker, Red	634	1 144	Oryx, Scimitar-horned	2 273	n/a
Eland, Cape	696	1 636	Serval	n/a	n/a
Eland, Livingstone	1 616	169	Springbuck, Black	145	231
Gemsbok	558	613	Springbuck	83	145
Genet	n/a	n/a	Springbuck, White	447	651
Giraffe	2 210	1 750	Springhare	n/a	n/a
Grysbok, Cape	225	n/a	Steenbuck	207	n/a
Grysbok, Sharpe's	n/a	n/a	Suni, Livingstone's	n/a	n/a
Hartebeest, Cape	533	562	Tsessebee	3 033	1 638
Hippopotamus	5 015	n/a	Warthog	114	n/a
Hyena, Brown	n/a	n/a	Waterbuck, Common	791	994
Hyena, Spotted	79	n/a	Wildebbeest, Black	285	438
Impala	101	173	Wildebbeest, Blue	259	372
Jackal, Black-backed	n/a	n/a	Zebra, Burchell's	728	692
Klipspringer	608	n/a	Zebra, Cape	n/a	n/a
Kudu	322	889	Mountain Zebra, Hartmann's	2 847	1 077

SOURCE: Damm, 2005; Eloff, 2002; Anon., 2005i

Although records of sale are not formally documented, it is estimated that the amount generated by private sales is double that of live sales (du P. Bothma, 2005).

Figures indicated that prices for wildlife are stable or dropping, and are no longer showing the steady increase seen in recent years. For example, the Ezemvelo KZN Wildlife wildlife auction raised ZAR23 million in 2003, ZAR9.4 million in 2004 and ZAR9.1 million in 2005 (Damm, 2005). This downward trend could be partially explained by a change in the species composition and numbers of animals sold, as well as lower demand for certain species, i.e. rhinoceroses on sale or a decreasing demand for wildlife.

The system of reporting average auction prices has been criticized as it creates an impression of large fluctuations in the market from year to year. Auction prices fluctuate according to three factors: i) the package offered, i.e. a package of one male and one female will receive less than a package of one male and three females, especially if it is a rare

species that is wanted for breeding; ii) the age of the animals – animals which can immediately start breeding are preferred; and, iii) the condition of the animal coupled with the reputation of the seller (Anon., 2005k).

The costs of purchasing wildlife can be written off against the profits made through farming wildlife. However, wildlife is considered ‘uncountable’ and farmers do not need to report stock numbers to the Receiver of Revenue (Anon., undated c). As most off-take figures are based on a percentage of the population, some form of reporting system should be possible.

REVENUE

The estimated value of the wildlife industry in South Africa for 2000 is shown in **Table 8**, although it is currently estimated to be in the region of ZAR1 billion (Damm, 2005). Of the total value of the industry, foreign trophy hunters are responsible for contributing approximately 18% of this income as against the 53% contributed by resident hunters, the balance being made up by taxidermy, live wildlife sales, eco-tourism and wildlife meat sales. However, Damm (2005) estimates the revenue spent by foreign hunters to be considerably higher at ZAR832 million. This expenditure comprises daily fees (ZAR186.7 million), observer fees (ZAR39 million), trophy fees (ZAR32.7 million), tips (ZAR11.3 million), travel, pre and post safari expenditure (ZAR150 million), taxidermy (ZAR102.5 million) and wildlife meat (ZAR14 million). The balance of this is tax on the various services.

Table 8

Estimated gross income for the wildlife industry in 2000

Source of revenue	Revenue (ZAR)	Percent
Biltong hunters (resident)	450 000 000	52.8
Trophy hunters (foreign)	153 000 000	17.9
Taxidermy ¹	10 000 000	1.2
Live wildlife sales	180 000 000	21.1
Eco-tourism	40 000 000	4.7
Wildlife meat sales	20 000 000	2.3
Total	853 000 000	100

Source: Eloff, 2002; ¹ Anon, 2000

Although not included in the above as a comparative figure was not available, a guesstimate of the value of the game bird industry was made by Berruti (2005) based on a study of the value of the bird watching industry by Turpie and Ryan (1998) and his personal knowledge of the wingshooting and birding industries. Berruti estimated the value of this industry to be between ZAR300-800 million annually. This figure includes the cost of travel and equipment.

Estimated expenditure by resident hunters in 2005 is presented in **Table 9**. Accurate figures are hard to compile as no official records are kept of the animals hunted, the number of hunters involved in this activity (W. Boing, Free State Department of Tourism, Environmental and Economic Affairs, *in litt* to TRAFFIC East/Southern Africa, August 2005; S. de Jager, Ezemvelo KZN Wildlife, *in litt* to TRAFFIC East/Southern Africa, August 2005; R. de Lange, Mpumalanga Parks Board, *in litt* to TRAFFIC East/Southern Africa, July 2005; M. Jonk, Northern Cape Department of Tourism, Environment and Conservation, *in litt* to TRAFFIC East/Southern Africa, August 2005; L. Lotter, Gauteng Department Agriculture, Conservation and Environment, *in litt* to TRAFFIC East/Southern Africa, August 2005; J. Pienaar, Eastern Cape Department of Economic Affairs, Environment and Tourism, *in litt* to TRAFFIC East/Southern Africa, July 2005) or the money spent. Western Cape does however require hunters to return their hunting licences once expired with details of the animals hunted. In about 75% of the cases, this does not happen (H. Stadler, CapeNature, *in litt* to TRAFFIC East/Southern Africa, July 2005).

Table 9

Estimated expenditure by resident hunters for 2005

Type	Number of hunters	Expenses per Year and Hunter (ZAR)	Value (ZAR)	VAT on Value
Highly dedicated hunters *	25 000	20 000	500 000 000	70 000 000
Dedicated Hunters *	25 000	10 000	250 000 000	35 000 000
Occasional Hunters *	150 000	3 000	450 000 000	63 000 000
<i>Subtotal</i>	<i>200 000</i>	<i>-</i>	<i>1 200 000 000</i>	<i>-</i>
Membership Fees **	50 000	500	25 000 000	3 500 000
Ammunition/Guns ***	200 000	2 000	400 000 000	56 000 000
Equipment ***	200 000	2 000	400 000 000	56 000 000
Taxidermy***	200 000	250	50 000 000	7 000 000
Transport & Hunting Vehicles***	200 000	2 500	500 000 000	70 000 000
VAT	-	-	360 500 000	360 500 000
Total			2 935 500 000	

SOURCE: Damm, 2005

* includes daily & trophy fees,

** membership fees to local hunting associations of 50 000 hunters

*** yearly expenditure on guns, ammunition, hunting clothing & equipment and transport of 200 000 hunters

The drive to increase tourism has no doubt played a large role in raising the profile of South Africa. Ease of travel and a relatively high standard of service and communications make the country a popular destination. In many instances, government has subsidized the establishment and/or growth of tourism ventures, particularly those involving previously disadvantaged people. Employment from the wildlife industry provides approximately

5000 to 6000 direct jobs for sport hunting and 63 000 jobs on wildlife production units (Anon., 2000).

The 2003/2004 provincial statistics for hunting show that 6673 foreign hunters visited South Africa during the period. These hunters harvested 53 453 animals and spent an average of 11 days on safari. This totals ZAR40.7 million in revenue before multipliers are used (**Table 2**). The accuracy of this data has been criticized as the Eastern Cape accounts for approximately 40% of the revenue and Limpopo only 25%. Furthermore, the average hunt in the Eastern Cape lasted 21-days with the hunter taking approximately 8 animals. In Limpopo, hunts lasted an average of 8 days with the hunter taking approximately 16 animals (Damm, 2005). The concern here is that if the official statistics are inaccurate, the quality of management decisions could be questioned.

No official records are kept for biltong hunting. It has, however, been estimated that in KwaZulu-Natal, where approximately 1780 people are members of hunting associations, each hunter takes an average of four animals, giving a combined total of about 7120 animals per year (S. de Jager, Ezemvelo KZN Wildlife, *in litt* to TRAFFIC East/Southern Africa, August 2005).

The paucity of authoritative statistical information is of concern (Hamman, *et al.*, 2005; G. Verdoorn, SAHGCA, *in litt* to Department of Environmental Affairs and Tourism, June 2005). In the absence of decision-making tools such as number of foreign and resident hunters, hunt returns and so on, it is impossible for managers to make decisions which support biodiversity.

Hunt fees and hunt packages

Trophy Fee: The hunting industry is based on free market principles allowing operators or wildlife production unit owners the freedom to set their own price for hunting. While some feel that standardized or minimum value prices are needed, others disagree. The advantage of a standardized price is that the potential client has a guideline by which to determine value for money. Such a system also provides government with a better basis for evaluating operations and assessing taxes. With fees varying by as much as 100%, the hunter bears the responsibility for ensuring he/she is getting value for money (**Table 10**) (Damm, 2005). It has been argued, however, that an owner/outfitter should be able to set prices according to the quality of the trophies or animals on offer. For example, areas which are renowned for good quality trophy kudu should be able to charge higher prices than owners/operators in areas which have kudu of average quality. Currently, the onus is on the potential client to determine value for money. Having to do so much personal research might discourage the potential hunter who may look at hunting opportunities in other countries instead. The production of guidelines might assist in maintaining standards and reducing the possibility of a hunter being disappointed.

Table 10

Average hunting fee for commonly hunted species in South Africa for the year 1999 (in USD)

Species	Average value	Species	Average value	Species	Average value
Aardvark	25	Genet, Large-spotted	40	Porcupine	25
Aardwolf	25	Genet, Small-spotted	35	Reedbuck	800
Baboon	80	Giraffe	2 300	Reedbuck, Mountain	450
Badger	50	Grysbok	500	Rhebuck, Grey	700
Bontebok	1 300	Hartebeest, Lichtenstein	1 000	Rhebuck, Grey	700
Blesbuck	350	Hartebeest, Red	850	Rhinoceros, White	25 000
Bontebok x Blesbuck	500	Hippopotamus	1 500	Roan	6 000
Buffalo	4 500	Hyena, Brown	1 500	Sable	4 000
Buffalo, Water	2 000	Hyena, Spotted	2 000	Serval	50
Bushbuck	600	Hyrax	25	Sheep, Barbary	1 000
Bushpig	250	Impala	280	Springhare	25
Caracal	300	Jackal, Black-backed	25	Springbuck	280
Cat, African Wild	25	Klipspringer	600	Squirrel, Ground	25
Cat, Small-spotted	25	Kudu	1 000	Steenbuck	220
Civet	100	Lechwe, Red	1 300	Suni	900
Deer, Fallow	400	Leopard	3 000	Suricate	25
Duiker, Blue	700	Lion	13 000	Tahr, Himalayan	2 000
Duiker, Common	220	Mongoose	25	Tsessebe	1 200
Duiker, Red	700	Monkey, Vervet	25	Warthog	220
Eland	1 700	Nyala	1 500	Waterbuck	1 300
Elephant	20 000	Oribi	1 000	Wildebeest, Black	800
Fox, Bat-eared	25	Oryx, Scimitar-horned	2 000	Wildebeest, Blue	850
Fox, Cape	25	Ostrich	700	Zebra, Burchell's	800
Gemsbok	850	Polecat, Striped	25	Zebra, Hartmann	2 000

SOURCE: C. Hoogkamer, SAPHCOM, *in litt* to TRAFFIC East/Southern Africa, July 2001

The manner in which fees are determined does not appear to be standardized. Many wildlife production unit owners simply add a percentage onto the price they paid at auction. Certain South African wildlife production unit owners have the perception that prices can be based on supply and demand, so as long as hunters are willing to pay high prices, they will remain high.

Table 11 provides a breakdown of standard hunting packages offered on the internet.

Details of prices for hunts of the “big five”, or including “big five” species, are normally marked ‘price on request’.

Table 11

Average packages offered by hunting outfitters in South Africa during 2005

Ordinary wildlife	Special wildlife	No. of days	Value of package (USD)
4 antelope		7	3 200 - 3 990
5 antelope		7	2 950 - 3 500
5 antelope		10	4 995
6 antelope		7	3 900
6 antelope		8	5 390
7 antelope		7	4 500
8 antelope	Black Springbuck	10	5 380
20 antelope		4	2 929

Source: Various hunting sites on the Internet

Dart safaris are generally cheaper with costs in the region of USD12,250 (P. Bartels, pers. comm., 2001).

Safari Operator Daily Rate Fee: Daily fees vary depending on the standard of the facilities offered. Hunters have a choice of accommodation varying from camping, to rustic, to luxury. The daily fee includes costs such as marketing fees and agent fees. **Table 12** provides the average daily fee charged by hunting outfitters. Hunting outfitter fees are often built into advertised packages.

Table 12

Average daily rate charged by hunting outfitters in 2005

Daily Rates	Average price (USD)	
	Plains Game	Dangerous Game
1 Hunter + 1 PH	250-380	900
2 Hunters + 1 PH	200-325	800
Observer	100-180	185
Rifle rental	80	

Source: Various hunting sites on the Internet

Concession Fees: Be they private or State-owned, concessions are usually put out to tender. Bids are judged not only on the actual financial amount offered but also their social and environmental aspects, in other words community development programmes and veld restoration programmes. Concession fees are usually structured in such a way that the price of wildlife available is built into the concession (G. Davies, pers comm., 2001).

Management bodies such as PHASA assist with the marketing of these concessions. They normally require that half the packages are marketed to members and the other half are opened up to non-members (G. Davies, pers comm., 2001).

Secondary industries

Taxidermy: The amount generated by the taxidermy industry during the last year is estimated to be in the region of ZAR102.5 million by foreign hunters and ZAR57 million by resident hunters, a total of almost ZAR160 million (Damm, 2005). **Table 5** provides an average price of the charges for taxidermy.

Wildlife meat: Camdeboo Meat Processors culled 65 000 head of wildlife in 2001 which represented about 80% of all wildlife professionally culled in and exported from South Africa, generating a turnover of about ZAR28 million (Flack, 2002). Currently, around 350 t of wildlife meat are exported annually and consists of springbuck (45 000 animals), kudu, blesbuck and a small amount of zebra. Springbuck is a particularly desirable species as most people are unable to differentiate between meat from a young animal as against meat from an old animal (P. Flack, pers comm., August 2005).

Eco-tourism: Some wildlife production units offer eco-tourism activities in conjunction with hunting opportunities. While it is not easy to estimate the worth of individual animals, especially antelope, attempts have been made for some of the more charismatic species. A habituated leopard in Londolozi Game Reserve was estimated to be worth USD50 000 a year. This is considerably more than what would have been obtained for the same leopard if hunted. The average trophy fee for a leopard was USD5 545 during the 2003/2004 hunting season (**Table 2**). Even with the multiplier effect added to this, it is clear that, in terms of this study, the leopard is worth more in terms of eco-tourism activities (Hunter and Balme, 2004). Despite claims by hunters that consumptive utilisation performs better than non-consumptive utilisation, this is not necessarily the case (Krug, 2001).

Distribution of revenue

There are no formal figures documenting distribution of revenue generated by the hunting industry. Due to the nature of industry, that is because it is predominantly privately owned, it can be assumed that the majority of the income is retained by the private owners. This is true not only for the actual hunting outfitters and professional hunters, but also the secondary industries such as taxidermy and wildlife production.

Wildlife producers claim that the successful running of a wildlife production unit is very expensive and high overheads, coupled with staff wages, leaves little room for profit. Indeed, the development costs of a wildlife production unit are estimated to be at least double what is paid for the land itself (Anon., undated c). While it has not been possible to obtain financial statements from wildlife production units, the number of people involved in wildlife production indicated that the profit margin is not as low as is claimed. However, the prices obtained on auction appear to be stable, and in some cases dropping. This could indicate that the market has become saturated with wildlife production units and it is no longer as lucrative a venture as it was in the recent past.

Socio-economic aspects

It was not possible to obtain details concerning the amount of money spent on wages, social development projects, capacity building and training programmes, and other similar things by the sport hunting industry. Such data is only incidentally available.

A survey of wildlife production units in Limpopo revealed that 35.5% of the respondents indicated that they derive an income from ecotourism activities and accommodation. A small percentage (7.9%) focused mainly on overseas tourists. Ecotourism activities included wildlife viewing, bird watching, night drives photo safaris, walking trails, day visits and sports related activities such as horse riding, mountain biking, fishing and 4x4 trails (van der Waal and Dekker, 2000). The income generated by wildlife production units offering ecotourism-related activities in Limpopo was estimated to be around ZAR33 600 per year per wildlife production unit. If this figure is indicative of the situation elsewhere, the 819 wildlife production units in South Africa offering such services would collectively earn roughly ZAR17 million annually (van der Waal and Dekker, 2000).

An estimated 5000 to 6000 jobs have been created from the hunting industry (Anon., 2000) directly with a further 63 000 jobs in secondary industries, excluding tourism. Limpopo alone provides 13 700 full-time jobs on wildlife production units and additional labour is employed during hunting season (van der Waal and Dekker, 2000).

DEVELOPMENT WITHIN THE INDUSTRY

Adherence to BEE codes of practice

The *Broad-Based Black Economic Empowerment Act 53 of 2003* requires that "every organ of State and public entity must take into account and, as far as is reasonably possible, apply any relevant code of good practice issues in terms of this Act". The Act attempts to facilitate broad-based black economic empowerment (BEE) by promoting economic transformation, achieving a substantial change in the racial composition of ownership and management structures and increasing the extent to which communities, workers, co-operatives and other collective enterprises own and manage existing and new enterprises. The Act makes provision for the formation of a Council which is responsible for developing a strategy relating to the implementation of the Act, as well as issuing codes of good practice relating to the determination of qualification criteria for the issuing of licenses, concessions or other authorisations, the development and implementation of a preferential procurement policy, the determination of qualification criteria for the sale of State-owned enterprises and the development of criteria for entering into partnerships with the private sector.

A draft code of good practice is currently available for public comment. This document contains a scorecard by which companies can measure their progress in terms of implementing BEE strategies. The score sheet covers aspects such as equity ownership, management, employment equity, skills development, preferential procurement, enterprise

development and a residual sector which allows for recognition of factors such as the provision of infrastructural support, use of labour-intensive production, beneficiation, investment in and support for enterprises operating in rural communities and investment in the development needs of employees.

Many of the businesses involved in hunting operations are small owner-managed operations. Staffing structure is generally as follows:

Wildlife production units – owner, manager, assistant manager (optional) and farm labourers;

Taxidermists – owner, secretary/personal assistant, artistic staff, curing staff, packing staff;

Wildlife capture – owner, pilot (optional or part-time), ground staff; and,

Hunting outfitters – owner, professional hunter, secretary, trackers, skimmers, hospitality staff.

Many of these businesses function in rural areas and make considerable use of staff from local communities. Although not possible to quantify, the responses to questionnaires distributed during this study, indicate that few have people of colour in management positions as most businesses are classified as owner-managed operations. Labour employed on the actual hunting concessions usually receive benefits such as meat, housing and transport (to town and to their community).

While most of the organizations consulted felt that BEE is important to the sustainability of the industry, a few abstained from providing information in this regard. While this could result from misunderstandings, mistrust and/or ignorance, the general impression is that the majority of businesses, as small private or family-owned enterprises, are not able to implement BEE (J. le Roux, ECGMA, *in litt* to TRAFFIC East/Southern Africa, July 2005; P. Viljoen, The African Hunters Guild, *in litt* to TRAFFIC East/Southern Africa, August 2005). The Eastern Cape Game Management Association (ECGMA) reports that of their members with larger operations, some have appointed people of colour as directors on their boards of management (J. le Roux, ECGMA, *in litt* to TRAFFIC East/Southern Africa, July 2005) and PHASA has a draft empowerment policy in place which includes similar appointments (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005).

Capacity building initiatives

Although a large number of wildlife-linked poverty alleviation projects occur throughout South Africa, few relate directly to the hunting industry (Geach, 2004).

Training programmes for professional hunters, wildlife scouts, wildlife guards, skimmers, trackers and problem animal controllers are run by Northern Cape, Mpumalanga, Free State, Eastern Cape, Gauteng and North West provincial nature conservation authorities (although not each province runs all the courses). Many of the wildlife production unit and hunting associations also run projects either by themselves or in association with the

provincial nature conservation authorities (S. Dorrington, PHASA, *in litt* to TRAFFIC East/Southern Africa, August 2005; A. Kitshoff, KZN Hunting and Conservation Association, *in litt* to TRAFFIC East/Southern Africa, August 2005; J. le Roux, ECGMA, *in litt* to TRAFFIC East/Southern Africa, July 2005; G. Rall, Agri Limpopo, *in litt* to TRAFFIC East/Southern Africa, August 2005; I. Smith, WRSA, *in litt* to TRAFFIC East/Southern Africa, August 2005).

Professional hunting is not a skill that can be acquired in a short period of time. Courses cover a wide range of skills from weapon selection and handling, ecology, ethics, public relations, first aid, marketing, handling of clients, tour guiding and so on (Mhangwana, 2004; G. Davies, pers. comm., 2001). Many of the required skills needed to succeed in the industry can only be acquired and developed during periods of internship. **Table 13** provides a breakdown of the number of learners sitting the professional hunters exam per province during the 2003/04 hunting season. Of these, only a small percentage are from previously disadvantaged backgrounds and increasing this percentage is seen as one of the key challenges facing the industry. Training is an expensive undertaking and Northern Cape has already set aside ZAR2 million for a mentoring programme (Anon., 2003b).

Table 13

Number of learners sitting the professional hunters exam per province and the success rates for the 2003/04 hunting season

Province	Number of learners	Number passed	Number failed	Number of rewrites
Mpumalanga	27	0	0	0
Limpopo	127	109	18	31
Eastern Cape	24	0	0	0
Gauteng	81	0	0	0
Northern Cape	74	44	30	10
North West	33	30	3	1
KwaZulu-Natal	30	0	0	0
Free State	18	0	0	0
Total	414	183	51	42

SOURCE: Anon., 2004

Due to the heavy demands placed on the professional hunter, the pass rate of these courses is not particularly high. Language has been identified as being one of the main difficulties. To illustrate, Mpumalanga received 2500 applications in 2003 for their hunting skills development courses. Out of these, a short-list of 60 candidates were selected for a period of initial training. Of these, only 19 achieved the 70% pass mark, and only 12 were selected for the professional hunting course. Of these, two students passed initially, while all of the others were retested on certain aspects at a later date (de Lange, 2004). Training to enable the professional hunter to become a hunting outfitter is also provided.

The Professional Hunter training standards have been drafted in terms of the South African Qualifications Authority (SAQA) but have not yet been made available to training

providers or learners. The speed of development of qualifications, unit standards and skills programmes has been frustratingly slow for industry and needs to be addressed. However, it should be noted that with the exception of the professional hunting industry who drove the development of the professional hunter training standards, little to no attempt has been made by the relevant sectors of industry to drive the development of qualifications for other sectors such as taxidermy and game capture and translocation (C. Patterson, pers obs. 2005).

Two levels of professional hunter are recognized – plains game and dangerous game hunters. Candidates generally undergo a 10-day training course but are expected to have about 200 days of experience before they are issued a license. In the past, hunting schools needed to be registered with SAPHCOM in order for their learners to achieve national accreditation. Training with unaccredited schools left the learner with the possibility that his/her qualification would only be valid for the province in which it was done (G. Davies, pers. comm., 2001; C. Hoogkamer, pers. comm., 2001).

In addition to the training provided to previously disadvantaged people, proficiency training is offered by various provincial authorities and wildlife and hunting associations. These courses aim to raise levels of marksmanship, ensure ethical conduct and increase general knowledge (A. Kitshoff, KZN Hunting and Conservation Association, *in litt* to TRAFFIC East/Southern Africa, August 2005; J. le Roux, ECGMA, *in litt* to TRAFFIC East/Southern Africa, July 2005).

Broad-scale programmes are also run by some of the provincial and State nature conservation authorities. For example, Northern Cape has been assisting the Mier community to develop their facilities for sport hunting and obtaining the necessary registration to do so (M. Badenhorst, Northern Cape Nature Conservation Service, *in litt* to TRAFFIC East/Southern Africa, July 2001). Gauteng's Dinokeng project is working towards promoting tourism in the Dinokeng region. Hunting opportunities will be offered at a few private lodges in the area which also boasts the "big five". There are approximately four community projects in Limpopo with the Makuleke project being the best known. SANParks and, to a lesser degree, Limpopo nature conservation, play a role in assisting this community with developing hunting and tourism facilities (D. von Wielligh, pers. comm., 2001).

Unfortunately, anecdotal information indicates that the learners, once having undergone training, are not being employed as professional hunters. During the Community Workshop on Trophy and Recreational Hunting, August 2005, an example was cited of an individual working as a car washer. His/her employer reported him as a skilled worker however. It is unknown how extensive this problem is but it needs further investigation.

In addition to the training courses provided by provincial nature conservation departments, prospective professional hunters may also attend one of the professional hunting schools.

Table 14 details the number of learners sitting the exams, as well as their success rates, of the various hunting schools during the 2003/04 hunting season.

Table 14

Number of learners sitting the professional hunters exam per professional hunting school and the success rates for the 2003/04 hunting season

Province	Courses	Number of learners	Number passed	Number failed	Number of rewrites	
D a v i d		10	74	32	42	6
Sutherland						
Academy						
Limpopo		4	39	0	0	0
Spring Valley		4	52	44	8	4
School						
B e l m o n t		3	27	14	13	0
Professional						
H u n t e r s						
Academy						
Goss Estates		3	26	13	13	10
G e r h a r d		1	0	0	0	0
Steenkamp,						
Western Cape						
JC and KS		2	13	12	1	2
H u n t i n g						
Academy						
U l t i m a t e		2	11	10	1	1
Adventures						
K o b u s		1	8	8	0	0
Schoeman						
H u n t i n g						
Academy						
T o t a l		30	250	133	78	23
NOTEREF						
_Ref11403561						
1 *						
MERGEFORM						
AT 13						

SOURCE: Anon., 2004

MARKETING

Effective marketing is a skilled undertaking which can be very costly. Poor marketing has the potential to damage the hunting industry as misrepresentations and hunter disappointment may occur. Marketing is carried out in a number of ways, including advertising in hunting magazines, word of mouth, conventions, internet and travel agents. Government authorities are obligated to dispose of their hunts via tender and auction but, in terms of effective marketing and maximizing the revenue raised, this may not necessarily be the best way (Barnett and Patterson, undated).

State

The marketing of hunts on State land is done by tender (Gauteng, Mpumalanga, Eastern

Cape) or auctions (Free State). Some marketing is also done overseas (Eastern Cape). In KwaZulu-Natal, hunts are sold through a tender and auction system for foreign hunts, but through application and a draw for local hunts. Northern Cape and Western Cape do not market hunts as they do not allow hunting on provincial reserves (M. Jonk, Northern Cape Department of Tourism, Environment and Conservation, *in litt* to TRAFFIC East/Southern Africa, August 2005; H. Stadler, CapeNature, *in litt* to TRAFFIC East/Southern Africa, July 2005).

From a national perspective, there is little to no marketing of the hunting industry. The official tourism portal, [HYPERLINK "http://www.SouthAfrica.net"](http://www.SouthAfrica.net) www.SouthAfrica.net, contains limited references to hunting opportunities. Indeed, it only provides contact details for dart safaris. Furthermore, the emphasis of individual marketing has created fierce competition between hunting outfitters. An overall marketing strategy by government should place emphasis on branding South Africa as 'the number one' hunting destination, followed by individual provinces and finally the individual outfitters (P. Viljoen, The African Hunters Guild, *in litt* to TRAFFIC East/Southern Africa, August 2005).

Private

The Hunt: Wildlife producers justify what appears to be high prices for wildlife by claiming that it is very expensive to keep a wildlife production unit in operation. Maximum off-take means that they also have to keep stocking the wildlife production unit with wildlife bought at high prices. Hunting associations have begun to object to the practice of setting trophy and hunting fees on the prices of the previous years auctions as this practice does not take into account the actual price of breeding the wildlife. Discrepancies in price between trophy animals and 'biltong' animals result. For example, in 1997 a kudu sold on auction for ZAR1,738. The price charged for a trophy kudu was 4500 but that of a biltong animal was ZAR1,995 (Barnett and Patterson, undated).

In terms of provincial conservation legislation (Eastern Cape, Gauteng, Limpopo, Mpumalanga, North West, Northern Cape, Western Cape), only hunting outfitters may market hunts. Thus, wildlife producers may not market their animals directly to the prospective hunters unless registered as a hunting outfitter. This structure allows for a difference in price between what the wildlife producer charges for an animal and what the outfitter charges. In essence, a middleman levy is being put on the wildlife (G. Davies, pers. comm., 2001).

The hunts offered by South African outfitters are marketed mainly in America, which attracts 65-70% of hunters, and in Europe, roughly 20-24% of hunters (C. Hoogkamer, pers. comm., 2001). A study by Radder (2003) revealed that the most used sources of information regarding hunting opportunities by hunters were hunting magazines, the internet, hunting conventions, word-of-mouth and Safari Club International.

Raffles and auctions are becoming increasingly popular. While seen as a legitimate method by the hunting fraternity, concerns from other sectors have been raised as to the fact that the raffles do not stipulate hunting methods, competency levels or age restrictions of the prospective hunters (Barnett and Patterson, undated). However, to compete successfully on the American market, some hunts must be donated. These cost the industry in the region of USD500 000 per year. While some consider them 'advertising costs', others consider them to be close to 'bribery' and out of reach for the smaller operator. For example, at the Safari Club International exposition, the location and position of an outfit's stand is based on the value of services donated for auction. This gives the larger outfitter's an unfair competitive advantage over the smaller operations. The quality of these donated hunts has been questioned, with outfitters seeking to recover some of their costs through inferior services (Barnett and Patterson, undated).

The costs associated with attending these shows and conventions is also quite high. The stand costs in the region of USD2700 and the outfitter needs to provide his/her own equipment, posters, handouts and publicity material. In addition to the airfares, accommodation and food costs around USD200 per day. The shows last for a period of four to six weeks (G. Davies, pers. comm., 2001).

Increasing use is being made of the internet which is a relatively cheap form of advertising. The disadvantage of this type of advertising is that it is not easily controlled or monitored. Misunderstandings due to poor marketing skills are a problem which have the potential to discredit the industry (G. Davies, pers. comm., 2001; R. Kretzschmar, pers. comm., 2001).

Some radio stations also use hunt packages as prizes for their listeners. Recently Radio OFM offered a four-day hunt opportunity for the hunter and his/her family. This package included about four or five animals (C. Patterson, pers. obs. August 2005).

Biltong hunters are mainly South African citizens. Although much information is available on the web, many of these clients are sourced by word of mouth rather than by active marketing. An estimated 200,000 people undertake biltong hunting each year. It is not possible to get an accurate figure as provincial legislation states that a person merely needs the permission of the landowner to conduct a hunt on their property. These figures are not recorded or documented.

Wildlife meat: Biltong and steaks are the best known forms of wildlife meat. Despite its health qualities, such as the fact that it is largely fat-free, lowers cholesterol and contains more protein and minerals than beef, it is generally considered to be a luxury item or something only eaten on certain occasions. The Northern Game Ranchers Organisation commenced a project in March 2005 to promote wildlife meat. The project initially focused on butcheries in Tshwane but plans to expand to other areas (Steynberg, 2005).

A study conducted by Hoffman *et al*, (2004) found that supermarkets and butcheries in the

Western Cape do market wildlife meat, with springbuck being the main species. They indicated that insufficient meat was available and felt that consumers were inadequately informed of the health benefits of wildlife meat. They were in favour of a centrally co-ordinated marketing structure and strict control over the quality of the meat.

“International marketing comes at a price of around ZAR150 000 per annum for a medium-sized wildlife production unit and about ZAR250 000 per annum for a large wildlife production unit” (Anon., undated c).

A survey of foreign hunters in the Eastern Cape revealed that hunting magazines remain the most used and most preferred source of information. This was followed by word-of-mouth. However, the internet was the second more preferred option. Hunting outfitters should make use of this fact and design their websites so that they provide all the required information.

The majority of foreign hunters in an Eastern Cape survey (53%) indicated that they would prefer to pay a fixed all-inclusive fee rather than a fixed price per individual service. They did however feel that taxidermy fees, ammunition and arms should be charged separately as these items called for personal choices. A fixed price per animal hunted rather than varying prices was preferred by 76% of these hunters (Radder, 2003).

From a marketing point of view, it is more expensive to attract a new client than to secure a returning client. A survey of foreign hunters in the Eastern Cape revealed that most of the hunters visiting that province were in the 40-60 year old age group. The study suggested that by attracting hunters in the age group 20-40 years of age, there was more possibility of securing repeat visits. These hunters listed the services of the professional hunter, tracker and guides, trophy preparation, conditions pertaining to the hunt, the service from the outfitter, abundance of wildlife, attitude of the wildlife producer and the trophy size of primary importance to them on a hunt. The low number of female hunters, about 4%, is an issue that the hunting industry considers it needs to address (Radder, 2003).

KZN Hunting and Conservation Association, together with Wildlands Conservation Trust and Ezemvelo KZN Wildlife, assist two communities to market hunts. Hunts are advertised in the Associations newsletter as well as via e-mail and fax. The revenue is collected by the Association and transferred into community accounts allowing for a full audit trail (A. Kitshoff, KZN Hunting and Conservation Association, *in litt* to TRAFFIC East/Southern Africa, August 2005).

IMPACTS

Impacts on the hunting industry are varied and come from many sources. Discussed below are two factors which have the potential to impact negatively on the hunting industry. Canned hunting has generated considerable media attention, most of it unfavourable. What

constitutes acceptable versus unacceptable hunting methods appears to vary from hunter to hunter but the element of fair chase usually forms a common thread. Canned hunting eliminates this thread but does provide the hunter with other advantages such as less time spent in the field.

Land claims also have the ability to impact on the hunting industry, although these impacts may be either negative or positive. Uncertainty regarding land security has led to some hunters not advertising their hunts and, therefore, a loss in income generation opportunities, while the redistribution of the land may create opportunities for historically disadvantaged individuals and/or communities.

Canned hunting

Canned hunting is the hunting of an animal in a small area. Although most commonly associated with lions, species such as cheetah *Acinonyx jubatus*, rhinoceros, sable, scimitar-horned oryx are also available (Macleod, 2005). These animals are either bred specifically for hunting, or are surplus or old animals from zoos and circuses. Provincial legislation states that this area may be no smaller than 400 ha. Animals are usually artificially fed and are often released into the area shortly before being hunted. This option allows a landowner to farm 'intensively' by purchasing animals, releasing them into relatively small areas and having them hunted within a fairly short space of time.

South Africa is one of only two countries which offers the "big five", lion being one of the more charismatic species. Four countries are mainly responsible for 'providing' trophy quality lion. Of these, Botswana has only recently reallocated the hunting of lion, Zimbabwe's hunting industry faces an uncertain future (Naidoo, 2003), which leave South Africa and Tanzania bearing the burden of providing lion. In fact, South Africa provides 30% of the African total of lion to the sport hunting market and of these, 80% are 'canned' (D. Keet, North West Lion Breeders and Hunting Association, *in litt* to the Panel of Experts, August 2005). The high percentage of 'canned' lion has the potential to discourage the 'pure' hunter who wants to shoot a wild lion. This type of hunter will then look elsewhere in the region when booking his/her safari. Safari Club International has removed all South African lion from their record books and placed them in a separate category. Hunters for which such records are important, will not be willing to hunt in South Africa.

During the 2003/2004 hunting season, lion hunting fees brought in a total of USD3.3 million. An undercover operation revealed that lion were available for canned hunting at prices ranging from R180 000 for 'the biggest lion' to R30 000 for lionesses (Macleod, 2005). Marketed correctly, hunts offering 'wild' lions should be able to raise more income, especially when coupled with one or more of the other 'big five' species (Barnett and Patterson, undated).

The hunting of white lions is in demand by certain hunters. White lions form part of the

legends of indigenous cultures and, as a colour morph specific to South Africa, are seen to be a valuable part of the country's heritage. Their lack of formal protection, over and above that received by tawny lions, is perceived as problematic by some (L. Tucker, Global White Lion Protection Trust, *in litt* to TRAFFIC East/Southern Africa, August 2005).

It has been suggested that the release of an animal into a self-sustaining area for a predetermined period of time prior to being hunted, serves no ecological, moral or practical purpose. Furthermore, it does not improve the animal's chances of escaping the hunter. Keeping an animal in a suitably sized enclosure (most provincial ordinances specify 400 ha for lion) relieves them of stress, has no impact on wild populations, reduces the risk of spreading disease, and does not endanger the lives or livelihoods of communities surrounding the area. Keeping predators in enclosures also reduces the economic risk of the lion hunting a trophy quality animal (Graupner, 2004).

Land claims

Land tenure in South Africa remains unbalanced with landlessness and poverty a source of insecurity among the majority of the historically disadvantaged individuals. This has largely been addressed by the Land Reform Programme through restitution, redistribution and tenure reform, but progress has been generally slow in resolving outstanding issues. In some instances, joint venture projects have been set up as part of the redistribution programme and are found mainly in agricultural areas (Anon., undated e). Claims submitted to the restitution programme have predominantly concerned urban areas but a few have involved wildlife areas:

Makuleke (Limpopo Province) – The Makuleke claim was for land in the Kruger National Park. The claim was settled and saw the Makuleke community (comprising 10 000 people) regain ownership over 25 000 hectares of land in the Kruger National Park. In terms of the agreement, the community will manage the land with SANParks and all income accrued from this area will be used for the community's benefit. The community will not move onto the land;

'Khomani San and Mier Communities (Northern Cape) – These two communities received a total of 130 000 hectares of land, 50 000 of which is in the Kalahari Gemsbok National Park and will be run as a contractual wildlife park. This land will be divided between the two communities (Anon., undated f);

Gongola Wildlife Reserve – A proposal has been made by the Gongola Wildlife Reserve company to develop 36 000 ha of land into a reserve. People who have been awarded land in terms of a land-claim would be able to lease their land back to the reserve. Not only would they have an income in terms of an equity agreement, but jobs would be created and the area uplifted (Elyot, 2002); and,

Ngome Community (near Greytown, KZN) – This community was the beneficiary of a 600 ha wildlife farm at Bambathaskraal in the 1990s. They have now signed a four-year contract with the KwaZulu-Natal Hunting and Conservation Association who will rehabilitate the hunting camp, train community members as camp staff, wildlife guards and field managers, and establish a sustainable hunting programme. Income will be obtained

from the trophies, the sale of meat and taxidermy. Proceeds will be used to build clinics, roads and schools (Elyot, 2004).

The impact of land claims as a basis for future community-run sport hunting operations has been mixed to date. While such developments have produced opportunities for rural communities to get involved in the sport hunting industry, some clearly are insecure in their ability to conduct such operations effectively and have failed to advertise their hunts. The reality is that while the opportunities to participate exist on paper, it has not been possible to do so as a practical consideration. The Makuleke community, for example, reached the stage of offering hunts, but now no longer does so due to apparent misappropriation of funds and lack of transparency in their initial attempt to promote sport hunting. The community also feel that they have raised sufficient funds to enable them to switch to ecotourism activities. In this instance, the switch to ecotourism might be beneficial for the community as a whole as ecotourism will bring a greater number of tourists through an area, thereby increasing the opportunity for entrepreneurship through activities such as the supplying of accommodation and crafts.

Some stakeholders perceive land claims to have resulted in the loss of wildlife production units for hunting purposes (M. Jonk, Northern Cape Department of Tourism, Environment and Conservation, *in litt* to TRAFFIC East/Southern Africa, August 2005; G. Rall, Agri Limpopo, *in litt* to TRAFFIC East/Southern Africa, August 2005), while others claim that the insecurity of having a claim lodged against their property means that they are not prepared to advertise hunts (I. Smith, WRSA, *in litt* to TRAFFIC East/Southern Africa, August 2005). This results in a loss of income for the farmer (P. Viljoen, The African Hunters Guild, *in litt* to TRAFFIC East/Southern Africa, August 2005; Anon., undated c). Some, however, perceive land claims to have had little effect on the industry (W. Boing, Free State Department of Tourism, Environmental and Economic Affairs, *in litt* to TRAFFIC East/Southern Africa, August 2005; J. Pienaar, Eastern Cape Department of Economic Affairs, Environment and Tourism, *in litt* to TRAFFIC East/Southern Africa, July 2005; H. Stadler, CapeNature, *in litt* to TRAFFIC East/Southern Africa, July 2005).

CONSTRAINTS

The constraints presented in section 13.1 and 13.2 have been consolidated from the information submitted via returned questionnaires, personal communications, issues raised at the two Public Hearings held by the Panel of Experts, and concerns raised in the literature referred to.

Regional

The actions of organizations and governments outside of South Africa have the potential to impact both negatively and positively on the hunting industry. Examples include:

Legislation – Legislative restrictions in the country of residence of the sport hunter have the ability to compromise the hunting industry in South Africa. For example, the Endangered Species Act of the USA places restrictions on which animals may or may not be imported

into the country. With a large percentage of South Africa's hunters coming from the USA, the consequences of such listings could be severe. Similar legislation exists in Europe.

Tax – A number of American hunters have apparently been abusing the charitable donations regulations in the USA. While on safari, hunters hunt a few specimens in addition to what they want. These additional specimens are then appraised at replacement cost and donated to non-profit organizations such as museums. The donation is written off as a tax deduction. In essence, these additional specimens subsidise the hunters safari. This matter is currently being investigated but it has led to a number of animals hunted unnecessarily, including endangered species (Kaufman, 2005).

Disease risk – It is essential that trophies leaving South Africa have been appropriately treated for pathogens. South Africa has a number of notifiable diseases such as African Swine Fever, Foot and Mouth Disease, Corridor Disease, and 'Snotsiekte' which are governed by veterinary restrictions. The spread of one of these diseases to an overseas country has the potential to result in the closure of that market.

Dialogue with neighbouring States – South Africa is not the only country in Africa which offers hunting opportunities to hunters. Indeed, Namibia, Botswana and Zimbabwe all have well developed hunting industries while Mozambique is in the process of developing theirs. Lessons can be learnt from these States but little to no attempt has been made to enter into dialogue (Barnett and Patterson, undated).

Competition – Although competition can be healthy, it can have its negative consequences. Until recently, South Africa was the only country offering the "big five". As Namibia now also offers this appealing offer, South Africa has lost some of its advantage. The desire to maintain this edge can lead some operators to seek out niche markets such as the provision of colour morphs and hybrids. These species contribute very little to biodiversity conservation (Hamman, *et al.*, 2005) and the use needs to be controlled to ensure that it doesn't negatively impact on the countries biological wealth.

Local

As a lucrative and competitive industry, hunting faces a variety of challenges and, from a negative point of view, is open to violations of the law, corruption, cheating and abuse. Below is an outline of the concerns surrounding the hunting industry which have been expressed by various stakeholders.

Image of hunting – Practices such as canned hunting, false advertising, luring wildlife through fences and unethical hunting methods have brought the industry into disrepute. Hunting outfitters are under enormous pressure to satisfy the demands of their clients. Some succumb to this pressure more easily than others and are willing to exploit loopholes in the law to their own advantage. The actions of these operators have the ability to bring the entire industry into disrepute and threatens a multi-million dollar industry. For it to regain its integrity, practices which have the potential to bring the industry into disrepute need to be effectively regulated.

Conservation versus business – South Africa has a history of managing its wildlife based on sound conservation principles. The current status of the hunting industry allows for a

focus on profit-and-loss, in the same way as agriculture does, rather than sound conservation objectives. Wildlife production has become recognised as a sector of farming, in the same way that farming with domestic livestock is. It is however still seen by some to be part of the environment, fulfilling important conservation objectives. Clarity needs to be provided on this issue as it affects the regulatory authority under which it falls, as well as the implementation of tax and BEE components.

Information systems – One of the fundamental requirements for making sound management decisions, is the use of accurate and comprehensive data. In the drafting of this report, it became clear that no official, formal, centralized record keeping system exists. This matter needs to be addressed.

Important part of local economies – Hunting offers a viable land use option in areas where traditional forms of agriculture are not possible. Limiting or halting hunting activities in these areas leaves the communities living there with little alternative to generate income.

Legislation – There are a number of concerns surrounding the legislation regulating the hunting industry. These include:

Under and over regulation;

Absence of a national framework which sees wildlife as a national asset;

Absence of uniform legislation across the country and the fragmented provincial structure;

Insufficient capacity to regulate the industry;

The complications and difficulties caused by the *Firearms Control Act 43 of 2003*;

Meat Safety Act 40 of 2000 is proving difficult to implement (this appears to be specific to KwaZulu-Natal);

Lack of linkage between hunting itself and the associated industries, i.e. taxidermy; and,

As 19 of the top 20 hunted species are not listed on the CITES Appendices, it is imperative that South Africa's legislation is adequate to control the trade in these species effectively;

Consultation and stakeholder involvement – A forum is necessary to ensure that formal dialogue can take place between nature conservation authorities and industry stakeholders and role players (Hamman, *et al.*, 2005);

BEE – While some feel that the requirements of BEE are unrealistic for sections of the hunting industry, others feel that it is essential that transformation take place. Determining which sector which components of the industry fall under is the first step in determining how best to go about implementing these requirements. Advice and consultation are needed to ensure that this is done timeously and effectively.

Capacity building and training – It is vital that capacity be built both amongst previously disadvantaged individuals and communities to ensure their involvement in the industry, and amongst provincial conservation authorities to ensure that regulation of the industry can be carried out effectively; and,

Transfer of benefits – Only hunting outfitters may market hunts and for this reason, communities have entered into agreements with hunting outfitters, allowing them to hunt on communal land in return for a certain fee. Hunting outfitters have not been transparent in their transactions creating mistrust and disillusionment. This area needs improved control or obligation on the side of the hunting outfitter.

Secondary industries

Taxidermy standards – There is no national qualification for taxidermists in South Africa and the country consequently has a mixed reputation for the production of quality trophies. Many hunters prefer to take the raw trophy home for processing where taxidermists may charge up to three times as much. The processing of a trophy may also take up to two years to complete. This reduces income, and causes the loss of jobs and other secondary benefits.

Dip-and-ship taxidermy services – In this form of taxidermy, the raw trophy is simply dipped and shipped. As these trophies are sometimes carried onto the airplane by the hunter as hand luggage, the turnaround time allowed between hunting and traveling is extremely short. During this period, the trophies need to be chemically treated for pathogens and the necessary veterinary and conservation permits need to be obtained. This process is often not carried out properly and the potential transfer of diseases to other countries should be viewed extremely seriously.

'Put-and-take' operations – In this type of operation, animals are put onto the farm and hunted almost immediately. They add nothing to the conservation of biodiversity and these ongoing practices need to be carefully considered.

Breeding of hybrids and colour morphs – Although these animals bring significant revenue into the industry, they do not contribute anything to the conservation of biodiversity (Hamman, *et al.*, 2005). The continued unrestricted breeding of these animals needs to be carefully considered.

Canned hunting – South Africa's ability to offer the "big five" gives it a marketing edge over most other east and southern African countries. Canned hunting has the potential to take the 'wild' out of hunting wild animals and to force hunters to go to other destinations. Hunters are prepared to pay high prices to hunt species such as lion and will probably not be willing to do so if the animal becomes easily obtainable. The desire to hunt such animals may subsequently decrease. The unethical practices of hunting darted animals and such like need to be regulated against. The condition in which animals are kept sometimes leaves much to be desired.

Marketing methods – Only outfitters may market hunts and the tools they use to do so have the potential to create problems if not used correctly. By seeking information through the internet, the hunter may be disappointed as misrepresentations may occur. Similarly, the raffling, auctioning or offering of hunts as prizes means that the outfitter may attract an undesirable client and will not be able to turn them away. The donation of hunts to secure good positioning at expos and conferences also costs the industry money – these costs may however be offset against advertising costs;

Pricing structures – The charges for wildlife vary considerably. Little guidance is given to the prospective hunter who carries the onus for determining value for money. Misrepresentations occur leading to disappointment and frustration. Over and above what the wildlife producer charges for an individual animal, the hunting outfitter puts a mark up on that animal. Some hunters are of the opinion that the fees charged are too high. The establishment of pricing guidelines might assist the prospective hunter in determining value-for-money and

Purpose of dart safaris – The origin of these safaris was to recoup management costs

through the involvement of a hunter, i.e. the hunter pays to immobilize an animal so that necessary management functions such as collaring, translocation or providing veterinary treatment can be carried out. This has not translated into practice and animals are now hunted purely for the money. Some animals are even darted several times which is contrary to veterinary advice.

The moral basis of the hunting industry – A sector of society is of the opinion that hunting should not take place under any circumstances and advocate this view strongly. Those opposed to hunting are able to generate considerable revenue from First World countries and the pressure created by these organizations has the ability to shut down the industry.

CONCLUSION

South Africa has a large and complex hunting industry which caters to both recreational hunters, sport hunters and those conducting traditional hunts. Just over 200 000 hunters engage in some form of hunting and this generates in the region of ZAR832 million rand from foreign nationals and ZAR2936 million from citizen hunters.

Although an old industry, it has grown rapidly in recent years as farmers move away from conventional agriculture towards wildlife production units. As with the development of many new industries, the stage is soon reached where the framework within which the industry operates needs to be reviewed. South Africa has reached this stage with its recreational and professional hunting industry.

The image of hunting varies within civil society and a programme needs to be put in place to clarify the role hunting plays, why it is important, why it is needed and how it is controlled.

The sector within which hunting and its subsidiary industries fall needs to be clarified. Certain aspects appear to best fit under agriculture while others fit under conservation. The aims and objectives of the two sections differ considerably and effective management plans can not be developed in the absence of such clarification.

It is only in light of the above clarification that the role played by breeders of alien species, colour morphs and hybrids can be assessed. It is widely acknowledged that the breeding of these animals does not contribute to conservation (Hamman, *et al.*, 2005) but it may well have a role to play in the generation of revenue, and provision of niche markets, should these activities be considered part of wildlife production under agriculture.

The development of capacity, particularly among previously disadvantaged individuals is of huge importance. Transformation has been slow and yet communities are keen to become involved in the industry. These opportunities need to be made available both on paper and in practice. Once qualified, individuals should be able to secure appropriate employment.

The legislative framework is complex and fragmented. Furthermore, there is little to no link

between the legislation governing the industry and that governing the secondary industries. For example, the *Meat Safety Act 40 of 3002* was developed in isolation from wildlife producers supplying wildlife meat. The requirements of this Act were impractical and did not consider the unique situation of wildlife meat producers and recreational hunters. It was only after dialogue was initiated by industry that resolution was sought.

Communication is essential. Industry is calling for the development of formal forums to enable effective dialogue between all the role players involved in the industry. The establishment of a forum, which can assist in addressing various problems including the image of the industry, setting of prices, numbers hunted and marketing strategies, needs urgent attention.

The marketing of hunts also needs to be addressed. Although a certain autonomy needs to be retained by the business owner, steps should be put in place to limit misunderstandings, disappointments and the possible loss of customers. DEAT should also promote this sector in their tourism campaigns as the hunter, who may travel with his/her family, is often interested in spending time in the country in addition to his/her safari.

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ANNEX 1
LIST OF SPECIES MENTIONED IN REPORT AND WHICH MAY BE
HUNTED IN SOUTH AFRICA

ANIMALS

Aardvark	<i>Orycteropus afer</i>
Aardwolf	<i>Proteles cristatus</i>
Addax	<i>Addax nasomaculatus</i>
Baboon	<i>Papio spp.</i>
Baboon, Chacma	<i>Papio ursinus</i>
Badger, Honey	<i>Mellivora capensis</i>
Bison, American	<i>Bison bison</i>
Blesbuck	<i>Damaliscus pygargus phillipsi</i>
Boar, Russian	<i>Sus scrofa</i>
Bontebok	<i>Damaliscus pygargus pygargus</i>
Buffalo	<i>Syncerus spp.</i>
Buffalo, Asian Water	<i>Bubalus arnee</i>
Buffalo, Cape	<i>Syncerus caffer</i>
Bushbaby	<i>Otolemur spp.</i>
Bushbaby, Thick-tailed	<i>Otolemur crassicaudatus</i>
Bushbuck	<i>Tragelaphus scriptus</i>
Bushpig	<i>Potamochoerus porcus</i>
Caracal	<i>Caracal caracal</i>
Cat, African Wild	<i>Felis silvestris</i>
Cheetah	<i>Acinonyx jubatus</i>
Civet, African	<i>Civettictis civetta</i>
Deer, Fallow	<i>Cervus dama</i>
Deer, Hog	<i>Axis porcinus</i>
Duiker, Blue	<i>Philantomba monticola</i>
Duiker, Common	<i>Silvicapra grimmia</i>
Duiker, Red	<i>Cephalophus natalensis</i>
Eland	<i>Taurotragus oryx</i>
Eland, Livingstone	
Elephant, African	<i>Loxodonta africana</i>
Fox, Bat-eared	<i>Otocyon megalotis</i>
Fox, Cape	<i>Vulpes chama</i>
Gemsbok	<i>Oryx gazella</i>
Genet	<i>Genetta spp.</i>
Genet, Large-spotted	<i>Genetta tigrina</i>
Genet, Small-spotted	<i>Genetta genetta</i>
Giraffe	<i>Giraffa camelopardalis</i>
Goat, Angora	<i>Ovis aries</i>
Grysbok	<i>Raphicerus spp.</i>

Grysbok, Cape	<i>Raphicerus melanotis</i>
Grysbok, Sharpe's	<i>Raphicerus sharpei</i>
Hare, Scrub	<i>Lepus saxatilis</i>
Hartebeest, Red	<i>Alcelaphus buselaphus</i>
Hippopotamus	<i>Hippopotamus amphibius</i>
Hyena, Brown	<i>Hyaena brunnea</i>
Hyena, Spotted	<i>Crocuta crocuta</i>
Hyrax, Rock	<i>Procavia spp.</i> and/or <i>Heterohyrax spp.</i>
Impala	<i>Aepyceros melampus</i>
Jackal, Black-backed	<i>Canis mesomelas</i>
Jackal, Side-stripped	<i>Canis adustus</i>
Klipspringer	<i>Oreotragus oreotragus</i>
Kudu	<i>Tragelaphus strepsicerous</i>
Lechwe, Red	<i>Kobus leche</i>
Lechwe, Kafue	<i>Kobus leche kafuensis</i>
Leopard	<i>Panthera pardus</i>
Lion	<i>Panther leo</i>
Mongoose	
Mongoose, White-tailed	<i>Ichneumia albicauda</i>
Mongoose, Yellow	<i>Cynictis penicillata</i>
Monkey, Blue	<i>Cercopithecus mitis</i>
Nyala	<i>Tragelaphus angasii</i>
Oribi	<i>Ourebia ourebi</i>
Oryx, Arabian	<i>Oryx leucoryx</i>
Oryx, Scimitar-horned	<i>Oryx dammah</i>
Polecat, Stripped	<i>Ictonyx striatus</i>
Porcupine	<i>Hystrix africaeaustralis</i>
Reedbuck	<i>Redunca spp.</i>
Reedbuck, Common	<i>Redunca arundinum</i>
Reedbuck, Mountain	<i>Redunca fulvorufula</i>
Rhebuck, Grey	<i>Pelea capreolus</i>
Rhinoceros	
Rhinoceros, Black	<i>Diceros bicornis</i>
Rhinoceros, White	<i>Ceratotherium simum</i>
Roan	<i>Hippotragus equinus</i>
Sable	<i>Hippotragus niger niger</i>
Serval	<i>Leptailurus serval</i>
Sheep, Barbary	<i>Ammotragus lervia</i>
Springbuck	<i>Antidorcas marsupialis</i>
Springhare	<i>Pedetes capensis</i>
Springhare	<i>Pedetes capensis</i>
Squirrel, Ground	<i>Xerus spp.</i>
Steenbuck	<i>Raphicerus campestris</i>

Suni	<i>Neotragus moschatus zuluensis</i>
Suni, Livingstone's	NOTEREF _Ref114295082 \h * MERGEFORMAT 14
Surricat	<i>Suricata suricatta</i>
Tahr, Himalayan	<i>Hemitragus jemlahicus</i>
Tsessebe	<i>Damaliscus lunatus lunatus</i>
Warthog	<i>Phacochoerus africanus</i>
Waterbuck	<i>Kobus ellipsiprymnus ellipsiprymnus</i>
Wild Dog, African	<i>Lycaon pictus</i>
Wildebeest, Black	<i>Connochaetes gnou</i>
Wildebeest, Blue	<i>Connochaetes taurinus</i>
Wildebeest, Red	<i>Connochaetes gnou x taurinus</i>
Zebra, Burchell's	<i>Equus burchellii</i>
Zebra, Cape Mountain	<i>Equus zebra zebra</i>
Zebra, Hartmann	<i>Equus zebra hartmannae</i>

BIRDS

Dove, Cape Turtle	<i>Streptopelia capicola</i>
Dove, Laughing	<i>Streptopelia senegalensis</i>
Duck, African Black	<i>Anas sparsa</i>
Duck, Knob-billed	<i>Sarkidiornis melanotos</i>
Duck, Maccoa	<i>Oxyura maccoa</i>
Duck, Red-billed	NOTEREF _Ref114295082 \h * MERGEFORMAT 14
Duck, White-backed	<i>Thalassornis leuconotus</i>
Duck, White-faced	<i>Dendrocygna viduata</i>
Duck, Yellow-billed	<i>Anas undulata</i>
Francolin, Greywing	<i>Francolinus africanus</i>
Francolin, Natal	<i>Pternistis natalensis</i>
Francolin, Orange River	<i>Francolinus levaillantoides</i>
Francolin, Swainson's	<i>Pternistis swainsonii</i>
Francolin, Shelley's	<i>Francolinus shelleyi</i>
Goose, Egyptian	<i>Alopochen aegyptiacus</i>
Goose, Spurwing	<i>Plectropterus gambensis</i>
Guineafowl	
Guineafowl, Helmeted	<i>Numida meleagris</i>
Ostrich	<i>Struthio camelus</i>
Pigeon, Red-necked	NOTEREF _Ref114295082 \h * MERGEFORMAT 14
Pigeon, Rock	<i>Columba guinea</i>
Pochard, Southern	<i>Netta erythrophthalma</i>
Quail	
Shelduck, African	<i>Tadorna cana</i>
Shoveler, Cape	<i>Anas smithii</i>
Snipe, Ethiopian	<i>G. nigripennis</i>

Teal, Red-billed

Anas erythrorhyncha

Teal, Hollard NOTEREF _Ref114295082 \h * MERGEFORMAT 14

REPTILES

Adder, Puff

Bitis arietans

Crocodile

Crocodylus niloticus

Hunting can be defined as *the act of seeking, following and killing wild (land) animals for consumption or display*. Columbia University Press.

Wildlife production has been described as the extensive use of multiple free-ranging wildlife species on extensive tracts of natural range (Krug, 2001). Here it is used more broadly to describe all activities where economic benefit is obtained through the breeding and selling of wildlife, whether live or dead (i.e. for hunting purposes and meat).

It has not been possible to differentiate between intensive and extensive production systems due to the variety and number of resources consulted. The term 'wildlife farm' should therefore be interpreted with some caution.

Although some South African residents do participate in this type of hunting, the completed questionnaires received from hunting organizations and provincial conservation authorities during the course of this study indicated that this number was exceptionally small ("small" was, however, not quantified and no figures were available to document the contribution they make to this form of hunting).

The definition of the term 'venison' varies widely. It is most commonly accepted as referring to the meat of cervids, or deer. Some dictionaries and internet sites expand this definition to include moose, elk, caribou and antelope. For the sake of this report, the term 'wildlife meat' will be used. Most of the wildlife harvested for their meat in South Africa are antelope.

Landowners who have a Certificate of Adequate Enclosure from their provincial authority may apply to that same authority for exemption to hunt, capture and sell wildlife in designated areas. Such farms are known as exemption farms. See Bürgener *et al.* (2005) for further information.

A list of all the species, as well as their scientific names where possible, are provided in Annex 1. This is, however, not an exhaustive list of species which can be hunted in South Africa.

The top 20 hunted species, by number hunted, are: Impala (7018), warthog (5457), kudu (5431), springbuck (4371), blesbuck (4330), gemsbok (2922), blue wildebeest (2132), Burchell's zebra (1811), black wildebeest (1804), bushbuck (1647), waterbuck (1394), common duiker (1271), red hartebeest (1218), mountain reedbuck (1115), steenbok (989), nyala (926), eland (923), black-backed jackal (363), caracal (346) and baboon (267).

Wherever possible, the actual species has been listed but where the data sources did not specify the species, this information has not been included. It was beyond the timeframes of this report to gather this information.

In this instance, 'wildlife meat' refers to unprocessed meat, although it may have been marinated. It excludes biltong.

This was the only year for which fully comparable data was available.

It is not certain whether this study took into account the maintenance costs of the animal and the property on which it was kept. Also, it should be kept in mind that not all areas are suitable for wildlife viewing making this argument redundant in certain areas.

These figures do not add up across the columns as rewrites may take place in any year.

Scientific name unknown

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