

HARVESTING THE FUTURE



Annual Report
2024-2025



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NAU

PRESIDENTIAL REVIEW

by Thinus Pretorius, President of the NAU

Agriculture may not be the largest contributor to Namibia's GDP, but it remains the backbone of employment, food security and social stability for the vast majority of Namibians. Directly and indirectly, this sector supports and sustains our nation. Namibia is, at its core, an agricultural country – and with a shared vision between all stakeholders, including government, industry and producers, significant growth is possible. However, true alignment between these role players remains a challenge. Collaboration and strategic coordination are essential to unlock the full potential of our sector.

The 2025 rainy season marked a turning point for Namibian agriculture. Following the devastating drought of 2024, widespread rainfall brought much-needed relief, even though it arrived late in certain regions. These rains were more than a blessing for farmers – they were a lifeline for the country as a whole. With critical storage dams running dangerously low, the replenishment of water resources restored hope and stability. At the same time, it reminded us of the fragility of our dependence on weather patterns and reaffirmed our gratitude to our Heavenly Father for His provision.

The outbreak of foot-and-mouth disease in South Africa cast a shadow over the region, causing severe disruption to the livestock industry. Thanks to close cooperation with the Directorate of Veterinary Services (DVS) and the Livestock and Livestock Products Board of Namibia (LLPBN), Namibia succeeded in protecting its animal-health status. The threat, however, remains ever-present, and ongoing vigilance from every citizen is essential to safeguard this critical national asset.

During the year, the NAU played a central role in defending an urgent court application seeking to remove the Veterinary Cordon Fence (VCF). While the case was declared null and void, the complainant has appealed, and proceedings continue in the High Court. The NAU remains firm in its position: national livestock movement is welcomed in principle, provided that it does not jeopardise existing industries. Any change must be carefully planned, scientifically informed and implemented in a manner that mitigates risk.

The long-awaited *Land Tenure Act* is currently under discussion in Parliament. Regrettably, the agricultural industry has not been sufficiently consulted in its drafting. Given the potential for significant demographic and structural shifts in land ownership, the NAU strongly advocates for transparency, inclusion and rigorous impact assessment to ensure outcomes that are fair, sustainable and supportive of national food production.

The NAU continues to champion regenerative agriculture, working closely with rangeland specialists, carbon-credit organisations and



NAU President: Thinus Pretorius

the charcoal sector, among others. Bush encroachment remains one of the most serious threats to grazing capacity, and the NAU provides ongoing input to authorities to address this challenge. We also remain focused on monitoring market stability, particularly in relation to Meatco – a vital pillar of the large-stock value chain. Current challenges at Meatco are concerning, and the NAU is actively pursuing solutions to ensure stability across both the commercial and communal sectors. The small-stock industry is likewise experiencing volatility, and alternative strategies are being explored to strengthen sustainability.

Unemployment remains one of Namibia's most urgent national challenges, and agriculture has the potential to play a transformative role in addressing it. Rising urbanisation and crime are often rooted in joblessness, and the NAU has emphasised the need for a balanced and practical approach to minimum-wage proposals. While international standards can be informative, they must be adapted to Namibia's unique socio-economic realities to ensure fairness and long-term viability.

Our partnerships with key institutions continue to grow. Cooperation between the NAU, the other agricultural unions, secondary industries and international bodies such as SACAU remains strong and productive. Our support to young farmers – strengthened by the invaluable contribution of the former president – is injecting new energy into the sector and helping to ensure a smooth generational transition.

Rural safety remains a top priority. The Joint Crime Prevention Forum (JCPF) has expanded remarkably, from 14 civic forums to more than 60 in just six years. Although data collection and storage still pose challenges, the NAU is actively pursuing solutions tailored to Namibia's specific context.

In an era defined by rapid change, reliable and timely communication is essential. The NAU is exploring innovative ways to engage with members, verify information and help shape accurate public perceptions. Our commitment to empowerment and innovation ensures that our members have the knowledge and tools needed to succeed. In

... PRESIDENTIAL REVIEW

parallel, we remain in ongoing discussions with the Communications Regulatory Authority of Namibia (CRAN) and other stakeholders to secure reliable and affordable rural network coverage.

Among the highlights of the past year has been the strengthening of relationships between the NAU and key political leaders. Our active involvement and invitations to contribute at high-level platforms – notably the opening of the October Agri Outlook Conference by the President of Namibia, Her Excellency Dr. Netumbo Nandi-Ndaitwah – demonstrate government's recognition of agriculture as a strategic national partner. The state remains one of our most important collaborators.

Agriculture in Namibia stands strong.

In the African context, our sector performs exceptionally well, and the NAU is recognised as a reliable and responsible industry leader. We remain stewards of the land, committed to building a sustaina-



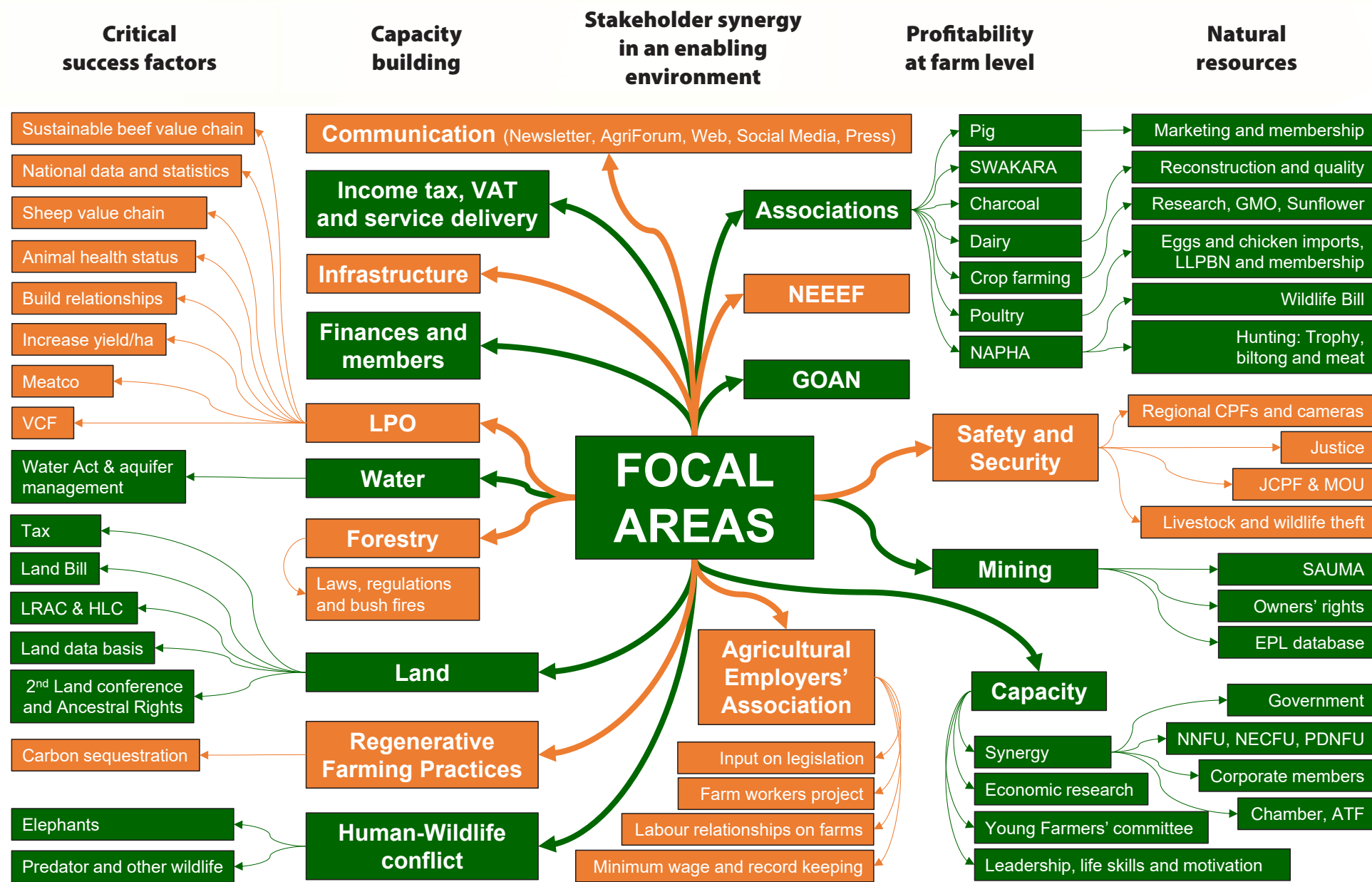
A historic moment at the Agri Outlook Conference: President Netumbo Nandi-Ndaitwah (center) appeared alongside Agriculture Minister Inge Zaamwani and the three presidents of Namibia's agricultural unions. Far left: Thinus Pretorius (NAU). Second from right: Adolf Muremi (NNFU). Far right: Dr. Ndahafa Nghifindaka (NECFU).

ble and economically viable farming environment. This vision continues to guide all our work, and it is the standard against which we measure our progress.



The audience at the Agri Outlook conference.

NAU Vision: To support and promote a conducive environment for sustainable agriculture



OVERVIEW

ECONOMIC OVERVIEW

HIGHLIGHTS OF QUARTER 3 OF 2025

- Agri-inflation rose by 3.67% year-on-year, driven mainly by higher operating costs, particularly animal health, feed, labour and maintenance expenses.
- Farmers continue to face a severe cost-price squeeze, with production costs increasing by more than 60% since 2017, while live-stock prices (especially weaners) have not kept pace, thereby eroding profitability.
- Cattle marketing declined sharply in 2025, with volumes 50% lower year-on-year due to prolonged drought and herd rebuilding. Live exports fell significantly, while more cattle were retained for breeding.
- Beef exports dropped by over 50%, largely due to reduced slaughter numbers and a sharp decline in exports to South Africa following Foot and Mouth Disease disruptions in that country.
- The local value chain remains resilient, absorbing most cattle marketed and reinforcing the importance of domestic slaughter and processing capacity.
- Sheep and goat sectors remained under pressure, with lower marketing volumes, although tighter global supply supported higher international prices, particularly for mutton and goat meat.
- Poultry production continued strong growth, supported by new investments, expanded capacity and improved regulatory enforcement, while dairy output remained stable despite high input costs and fewer producers.
- The outlook for 2026 is cautiously positive. Gradual recovery is expected as herd rebuilding continues, with firm prices supported by tight supply as well as ongoing risks from high costs, climate variability and animal health challenges.

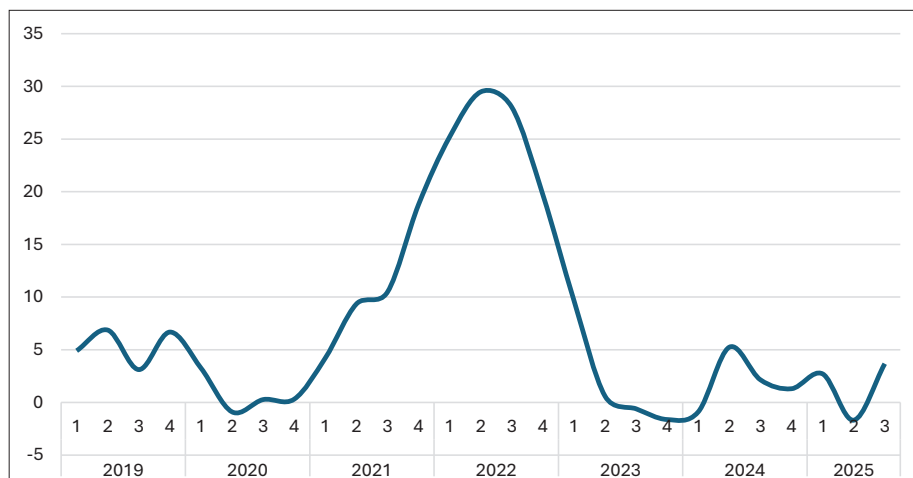


Figure 1. Agri-Inflation Trends (2019 Q1 to 2025 Q3)

Source : NAU

Agri-inflation

Agricultural inflation rose by 3.67% year-on-year (September 2024 to September 2025), mainly driven by sharp increases in key operating costs. Animal health expenses were the largest contributor, adding 26.81%, reflecting higher spending on veterinary products and disease-control inputs. This was followed by increases in maintenance and fixed improvements (9.27%), feed and minerals (5.78%), labour (4.00%) and electricity (2.72%), all of which placed upward pressure on production costs.

Smaller positive contributions also came from vehicle repairs. These increases were partial-

ly offset by declines in capital expenditure, which decreased by 6.14% and suggests reduced investment in equipment. Fuels and oils declined by 1.15% due to lower fuel prices. Overall, the strong upward movements in operational expenses outweighed the cost reductions, resulting in the net agri-inflation increase recorded for September.

Farmer returns

Despite the perception that livestock prices have improved in nominal terms, the economic reality is that farmers are absorbing cost increases at a much faster rate. The widening gap between what producers earn and what they spend underscores a cost-price

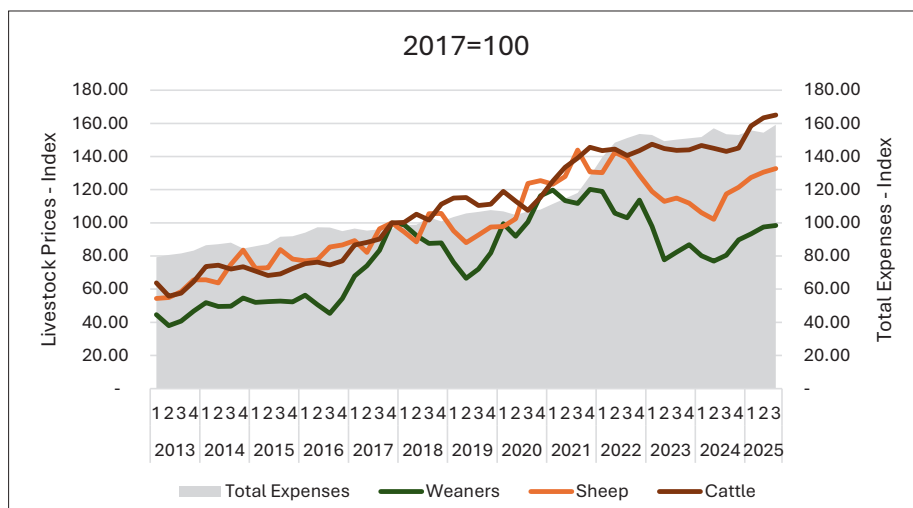


Figure 2. Production Cost Index versus Livestock Prices

Source: NAU

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squeeze that has become entrenched in the industry. While livestock prices for weaners, sheep, and cattle have risen over the years, these gains have been inconsistent and highly sensitive to drought conditions, market fluctuations and export demand. According to Figure 2 below, total livestock production expenses show a steady and almost uninterrupted upward trend from 2013 to 2025. By 2024 and early 2025, expenses exceeded an index level of 160, indicating that production costs increased by more than 60 per cent since 2017.

Contrastingly, livestock prices for weaners, sheep and cattle also rose over time, but their movements were far more variable. Prices usually respond to drought conditions, supply shifts and market demand, resulting in periods of strong increases followed by declines. Although livestock prices are currently higher than they were in 2017, they have not kept pace with the consistent upward movement in expenses.

Weaner prices remain slightly below the 2017 level, with an index of 98.44, indicating that weaner prices have essentially not grown in nominal terms over this period. In contrast, slaughter cattle prices have risen much more strongly, reaching an index of 165.04. This means slaughter cattle prices are roughly 65% higher than they were in 2017. Sheep prices also show a notable increase, with an index of 132.75, reflecting a growth of about 33 percent since 2017.

MARKETING Cattle

Namibia is currently in an extended recovery period following drought conditions, with some areas experiencing three consecutive dry years since 2019. This prolonged environ-

Beef Exports to Europe (Jan – Sep) - tons		
	2024	2025
EU	10,412	7,738
Norway	1,471	1,083
Greece	-	97
UK	2,934	47
Total	14,818	8,965

Table 1 Beef Exports to Europe

Source: LLPBN

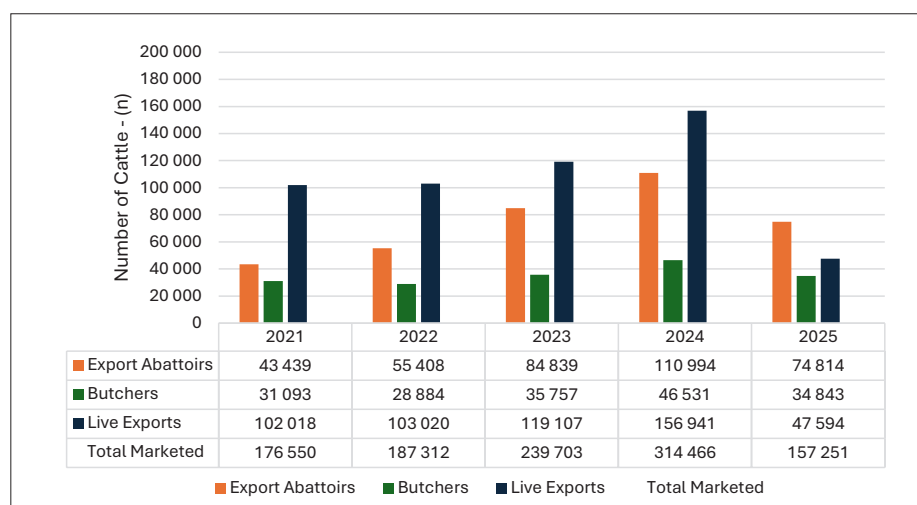


Figure 3. Annual Cattle Marketing Trends (January to September)

Source: LLPBN/ NAU

mental stress necessitated widespread destocking across the cattle sector.

In 2025, between January and September, 157,251 cattle were marketed. This is 50% lower than the marketing during the same period last year and 27% lower than the 5-year average. This is mostly attributed to a significant drop in the number of cattle exported on the hoof. An estimated 60% of animals traded through auctions were retained for breeding and growing out as oxen. This pronounced contraction in marketable supply reflects a fundamental biological constraint. After several years of environmental stress, producers simply did not have enough market-ready animals available for sale.

This is further reflected in the number of cattle slaughtered locally, which dropped 31% from the 157,525 heads slaughtered last year. As a result of low slaughter at export abattoirs, beef exports dropped by 51%, with only 9,499 tons being exported during the

first 9 months of the year, compared to the 19,324 exported last year. Significantly, exports to South Africa, our main destination, dropped by 96%. This was attributed to Foot and Mouth Disease outbreaks experienced in South Africa, where limited livestock movement within the country increased their local beef availability and consequently influenced the demand of meat from Namibia.

Namibia is a net exporter of cattle and beef, making its entire production reliant on regional and international markets. The Namibian cattle sector relies on a dual market system for its producers: live exports on the hoof and local slaughtering for domestic and international markets. The balance between these two markets has been consistently and significantly in favour of the local value chain, for example, in Table 3 below, the total kilograms slaughtered locally were more than double the exported kilograms. This shows that the local value chain is already a powerful and significant part of the industry.

Beef Exports to Africa (Jan – Sep) - tons		
	2024	2025
South Africa	4,017	154
Angola	31	38
Botswana	-	226
Lesotho	-	77
Ghana	23	-
Total	4,071	495

Table 2 Beef Exports to Africa

... ECONOMIC OVERVIEW

Table 3. Kilograms exported on the hoof versus kilograms slaughtered at export abattoirs

	2023	2024	2025 Jan to Sep
Number cattle exported live on the hoof - heads	151,808	177,667	47,594
Number of cattle slaughtered - heads	150,753	194,315	109,657
Estimated live mass @ abattoirs	450	450	450
Estimated live mass for exports on the hoof	210	210	210
Kgs exported live	31,879,680	37,310,070	9,994,740
Kgs sold live to local and export abattoirs	67,838,850	87,441,750	49,345,650
Total kgs marketed	99,718,530	124,751,820	59,340,390
% of local slaughter marketed	68%	70%	83%

Source: LLPBN/NAU

In summary, Namibia's cattle sector in 2025 was characterised by severely constrained supply, weakened export performance, and a market still recovering from years of drought-induced destocking. The sharp contraction in slaughter numbers, the decline in exports, (particularly to South Africa) and the decline in live cattle marketing all point to a system operating below historical capacity due to biological and environmental limitations.

Yet, despite these pressures, the data clearly shows that the local value chain remains the dominant and most resilient component of the industry, consistently absorbing more animals than the live export market. This entrenched structural reliance on domestic slaughtering underscores the critical role of local abattoirs, processors and beef exporters in sustaining the sector during periods of reduced market-ready cattle. As conditions gradually improve and herd rebuilding continues, the ability of the local value chain to stabilise production and support higher-value markets will remain central to Namibia's long-term beef competitiveness.

International beef markets

Globally, beef markets remain shaped by tight supply and shifting trade flows. In the EU, prices for premium chilled beef climbed to record highs due to exceptionally limited steer availability in Argentina and Uruguay, keeping steer prices elevated despite softer seasonal demand. Meanwhile, the United States is experiencing historically low cattle

United States

The U.S. market is being reshaped by historically low cattle inventories and the recent tariff surge imposed on several suppliers, most notably Brazil, which has effectively removed Brazil from the U.S. import market. As a result, importers are turning more aggressively toward Australia, Paraguay, Uruguay and Nicaragua to fill the manufacturing beef gap. Strong domestic consumption, falling production and reduced imports continue to support firm and rising prices for lean beef, with imported beef trading steadily higher

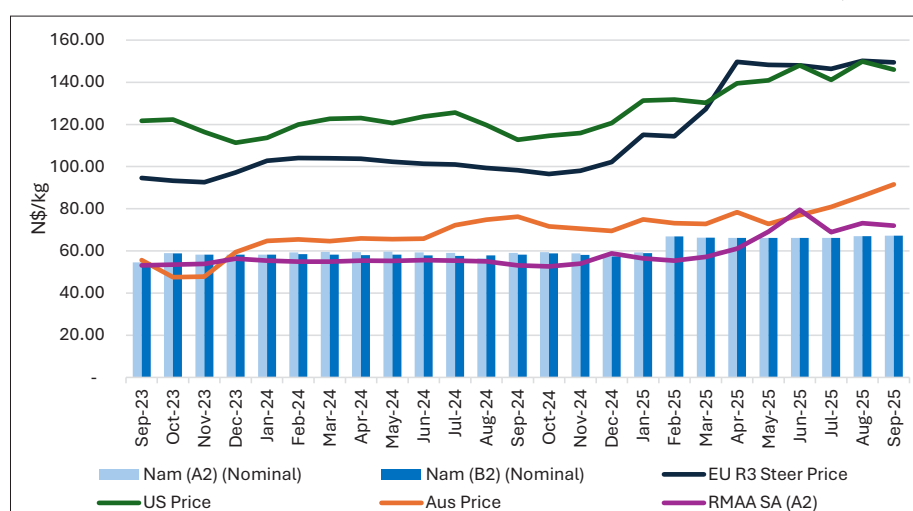


Figure 4. International Cattle Price Trends

Source: World Beef Report

inventories, sustaining strong domestic demand for imported lean beef.

European Union

In 2025, Europe was the preferred destination for over 90% of Namibia's beef. The EU market had been facing tight supply due to falling production, especially in the Netherlands, one of the bloc's major producers, where output declined by 11%. This tightening of regional supply has contributed to a 13% increase in EU beef imports, largely filled by South American suppliers. For Namibia, these conditions present both an opportunity and a competitive challenge, as elevated EU prices support export values but also intensify competition with larger, lower-cost producers.

as the market adjusts to new trade dynamics.

Australia

Australian heavy steer prices have risen notably compared to 2020, reflecting sustained international demand, particularly from the U.S. and Asian markets, although still showing greater volatility linked to seasonal conditions and slaughter cycles. Collectively, these dynamics underscore a global market where high-value regions continue to pull product at elevated prices, tightening competition for exporters such as Namibia.

Sheep

Namibia's sheep sector remained under considerable pressure between 2024 and 2025, as drought-related destocking and

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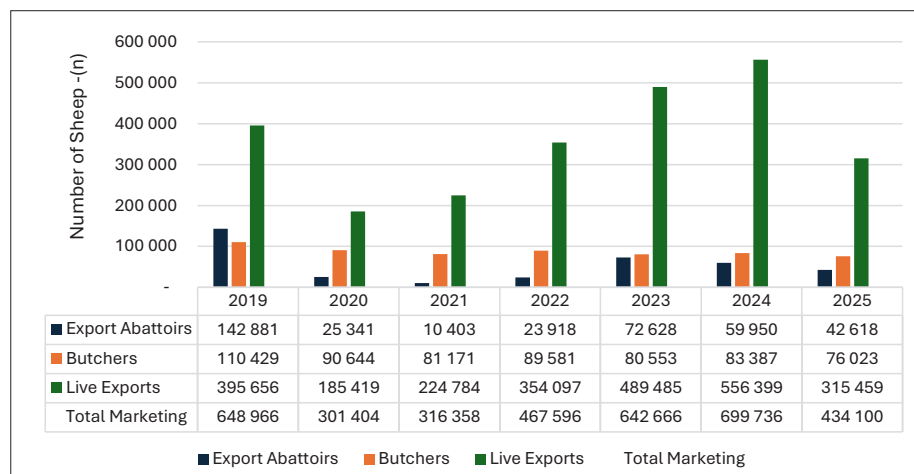


Figure 5. Annual Sheep Marketing Trends (January to September)

Source: LLPBN

weak external demand significantly reduced throughput.

Total marketing reduced by 37.96%, mostly influenced by a 43.55% decline in the number of sheep exported on the hoof to South Africa, a key market for small stock producers. Local slaughter, on the other hand, declined by 17.22% reflecting reduced slaughter availability and declining export opportunities which is reflected in mutton exports dropping from 632 tons exported during the period observed last year to 274 tons in 2025. These domestic dynamics mirror broader global movements in the mutton market

Table 4. 2025 Mutton Exports

Mutton Exports to Africa and Norway (Jan – Sep) - tons		
	2024	2025
South Africa	543	123
Botswana	69	109
Zambia	20	-
Lesotho	-	18
Norway	-	24
Total	632	274

Source: LLPBN

International mutton markets

The international mutton market has experienced significant fluctuations over the past six years, shaped largely by shifting supply conditions, production shocks and evolving global demand. As shown in the Figure

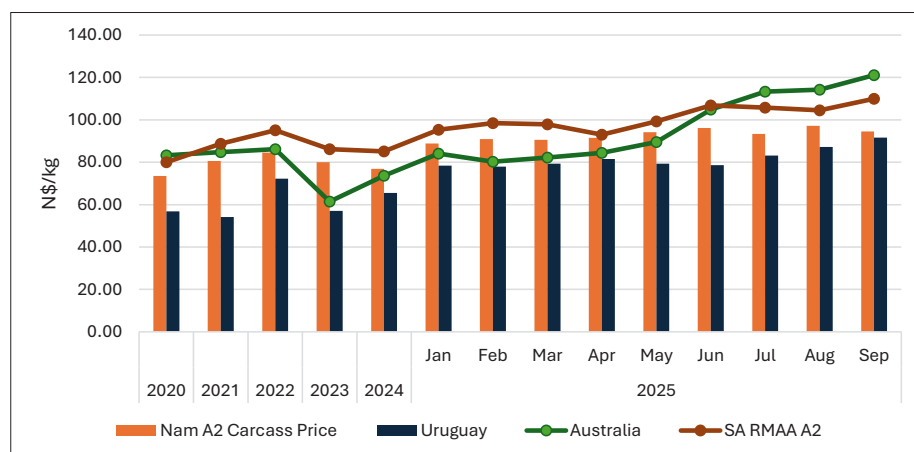


Figure 6. International Lamb Price Trends

Source: NAU/ World Beef Report/ MLA Australia

6 below, producer and export prices across Namibia, Uruguay, Australia and South Africa have followed distinct but interconnected trends, with all markets responding to drought cycles, disease pressures, changes in slaughter volumes and stronger demand from high value importing regions.

While price movements vary by country, the overall pattern indicates a tightening global supply environment from 2024 onward, culminating in a strong upward correction in 2025 across all major producers. This provides important context for understanding relative competitiveness, regional market positioning and the broader dynamics influencing mutton and lamb prices globally.

Uruguay

Uruguay's export lamb and mutton prices climbed sharply in 2025 largely because of tight supply and shrinking production. Sheep slaughter numbers were about 22 % lower than in 2024, which reduced available export volumes and pushed up prices. For example, recent export lamb prices averaged over US \$5,500 per ton, about 41 % higher year-on-year. Lower flock numbers and constrained weekly export volumes meant Uruguay was competing more aggressively for scarce global demand, helping to lift export prices.

Australia

Australia's lamb export prices were on a strong upward trend mainly due to surging global demand and competitive market dynamics. Record price indicators showed heavy lambs fetching nearly N\$120 per kg, up 50 % from the previous year, driven by strong overseas orders (particularly from China, the US, UK, EU and Middle East) and larger total export volumes.

Australia is also benefiting from relative supply weakness in New Zealand, its main competitor, allowing it to capture more export share and support higher farmgate and export lamb prices.

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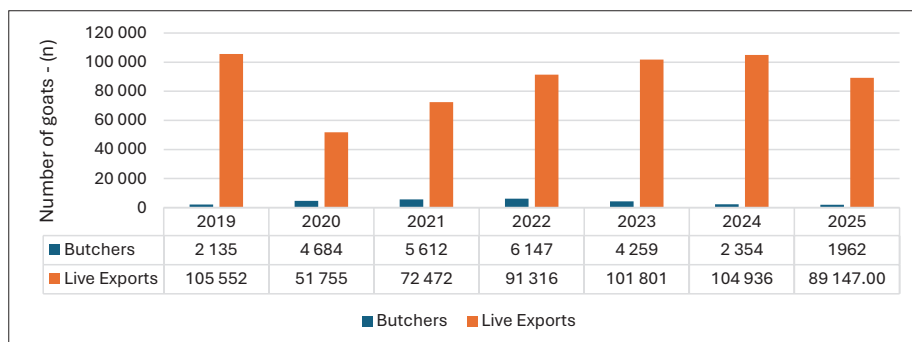


Figure 7. Annual Goat Marketing Trends (January to September)

Source: LLPBN

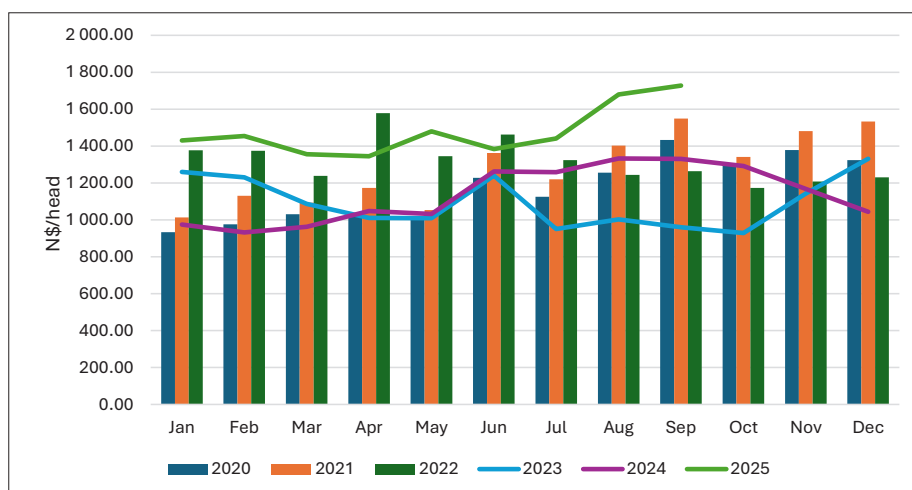


Figure 8. Goat Price Trends (2020-2025)

Source: LABTA/NAU

Goats

Goat marketing remained low with only 1,962 slaughtered at B&C class abattoirs. This reflected limited domestic demand and a value chain that has not yet developed strong local processing capacity or incentives for slaughter.

The goat sector is heavily export-oriented, with live exports consistently absorbing most goats marketed each year. While this channel has provided reliable income for producers, it also means the sector remains highly exposed to external market conditions in South Africa, where regulatory changes, price shifts, or biosecurity events can quickly influence export volumes.

Goat prices (Figure 8 below), on the other hand, remained on a clear upward trend, owing to tighter supply and strong buyer competition. The 2025-price line consistently trended above previous years, rising sharply from mid-year and peaking towards September/October, when average prices exceeded N\$1,600 per head, significantly higher than the typical N\$1,200–N\$1,300 range observed in earlier years.

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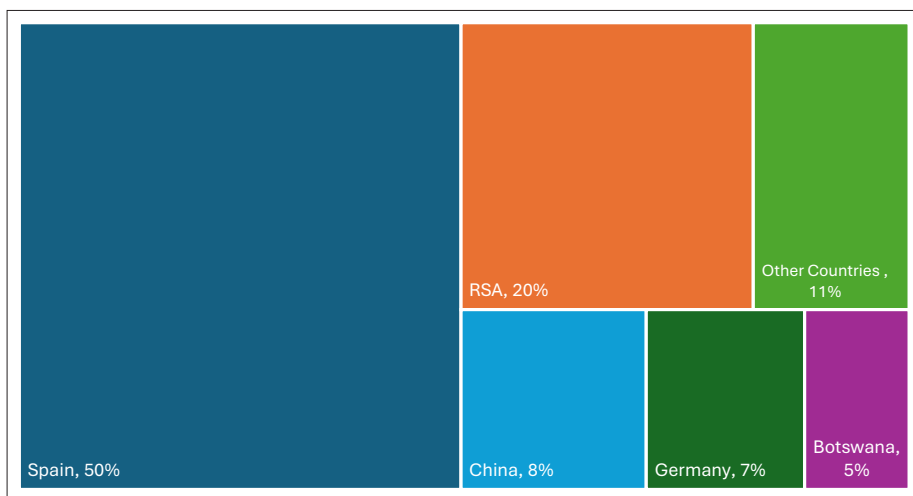


Figure 9. Pork Imports by Destination

Source: LLPBN

Pigs

Pig marketing remained relatively stable, growing by 5 % from the 37,134 marketed between January and September 2024. This is owed to an increase of 1,675 heads in the number of pigs slaughtered at B&C class abattoirs above the 37,134 slaughtered last year. A total of 5,108 tons of pork were imported during the period observed, predominantly from Spain (2,536 tons) .

Of the total imports, 57% of imported pork is offal which is often used in processing purposes, followed by cooked and uncooked processed pork (27%).

Poultry

Namibia's poultry sector continues to expand rapidly and is the second biggest sector contributing to farmers' cash receipts. The sector is supported by growing private-sector investment and strengthened regulatory engagement. In 2024, broiler production increased by 14.94% and egg production by 6.63%, with further growth recorded in 2025 as more than 14.3 million chickens were marketed in the first half of the year, driven largely by NPI and the successful first year of operations of Kadila Poultry.

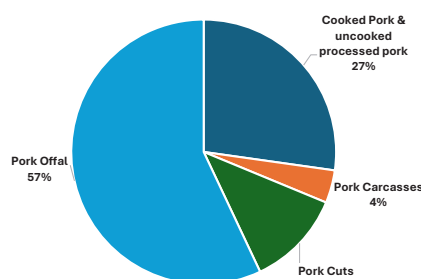


Figure 10. Pork Imports by Type (January to September 2025)

Source: LLPBN

Several producers are undergoing major expansions, with new processing plants and integrated breeder-hatchery systems positioning the industry to scale up significantly over the next few years. The SME segment is also growing, producing approximately 60,000 broilers per week for informal markets. Regulatory support through LLPBN border policing and levy-funded enforcement has strengthened controls against poultry smuggling, while ongoing engagements with DVS on an Avian Influenza Master Plan aim to safeguard sector biosecurity.

Dairy

Milk production ending September 2025 recorded steady output (14.4 million litres produced between January and September 2025) despite a declining producer base.

There is now only one major producer in the South. The exit of producers was driven primarily by high input costs, particularly feed, energy and compliance, which eroded profitability. Despite these pressures, producer prices remained relatively stable, averaging around N\$7.40 to N\$7.50 per litre.

OUTLOOK FOR 2026

As Namibia enters 2026, most livestock and crop industries are expected to remain shaped by the recovery cycle following several years of drought and reduced production capacity. Cattle marketing is projected to improve only modestly as herd rebuilding continues, while sheep and goats may recover more quickly due to shorter production cycles. Prices across major commodities are expected to remain firm, supported by tight regional supply, steady export demand and ongoing cost pressures. Poultry and horticulture sectors are poised for further expansion, underpinned by new investments, improved regulatory enforcement and strengthening value chains. However, high input costs, climate variability and animal health risks remain key challenges.

AGRICULTURAL EMPLOYERS' ASSOCIATION OF NAMIBIA

LANDBOUWERKGEWERS
VERENIGING

Geaffilieer by die NLU



AGRICULTURAL EMPLOYERS'
ASSOCIATION

Affiliated to the NAU

The past year was once again characterized by stability and peace on the labour front on commercial farms, with very few labour disputes. The AEA, mandated to inform and advise NAU members on labour matters, consistently experienced good cooperation from members with interactive participation at all levels. Members are particularly thanked for their enthusiastic participation in the 2024 opinion poll regarding the National Minimum Wage (NMW). The 2026 Wage Survey will provide management information on the impact of the NMW.

Over the years, the AEA has established itself as one of the most important employers' organisations in Namibia, providing input and protecting the interests of commercial farmers and agriculture.

MINIMUM WAGE

Agricultural Minimum Wage

On 21 May 2024, the Ministry of Labour gazetted the negotiated Agricultural Minimum Wage, thereby extending the Collective Agreement on Minimum Wage in the Agriculture Sector to the entire agricultural sector. This is the minimum wage that has been negotiated by the AEA and the Namibia Farm Workers' Union (NAFWU) since 2003.

National Minimum Wage (NMW)

Subsequently, on 7 August 2024, the National Minimum Wage was also gazetted. This wage order stipulates that the NMW does

not replace sectoral wage agreements but only determines the minimum *cash* salary. Thus, as from 1 January 2025, farm workers were to receive at least N\$10.00 per hour in cash, as well as the in-kind benefits as per the May 2024 gazetted Minimum Wage Agreement.

The agricultural sector was to phase in new wages as follows:

- In 2025, \$10 per hour
- In 2026, \$14 per hour
- In 2027, \$18 per hour

The AEA, together with the Namibia Agricultural Labour Forum (NALF), spent the year emphasising that the Ministry of Labour's wage order with its huge increments was unfeasible: From the previous \$6/hour to \$10/hour (67%), followed by an increase to \$14 per hour (40%) and another to \$18/hour (29%). This is deemed unaffordable for much of the sector. Since the start of wage consultations in 2021, the agri sector has requested exemption, as farm workers have a unique situation with free housing, water, power, nutrition and transport that are an additional cost to company. No exemption was granted by the Ministry of Labour and instead the phasing-in model was gazetted. Strong exception against this model has been expressed ever since and, by the start of 2026, NALF and the AEA are geared to again take up the matter with the third Executive Director assigned to Labour.



Chairperson: Christine Stoman

REPRESENTATION OF THE AEA ON VARIOUS ENTITIES

The AEA participates in various bodies, board and forums –

- NAU Executive Council
- Agricultural Labour Forum (NALF)
- Namibia Employers' Federation (NEF)
- Technical Committee - Generational Farm Workers
- Advisory Committee on Child Labour (PACC – ILO)
- Khomas Regional Development Committee

NAU FARM WORKERS' PROJECT Low-cost housing

The AEA's 2024 Wage Survey indicated that 83% of farm workers already have housing elsewhere for retirement purposes. Meanwhile, an earlier request to Agribank to provide loans for retirement homes in towns for farm workers proved futile, as the bank's mandate only allows loans on agricultural land. This matter should be taken up at regional level with the local municipalities so that affordable erven may be set aside near medical care for elderly ex-farm workers.

... AGRICULTURAL EMPLOYERS' ASSOCIATION OF NAMIBIA

Retirement benefits

According to the 2024 AEA Wage Survey, employers indicated that only 14% of farm workers currently have savings or pension plans for retirement. However, all farm workers will benefit from the government's National Pension Fund when implemented.

Generational farm workers

No progress was made during the past year by the Technical Working Group on Generational Farm Workers after the last meeting of 20 June 2024 was cancelled at short notice due to lack of interest from the majority of the government agencies that form the group. In the meantime, the AEA already formulated its point of view in accordance with a draft policy document of the Labour Advisory Council (LAC), which serves as a point of departure in this regard.

AEA SECRETARIATE

The AEA's advisory service to members on labour practices and the application of the Labour Act is aimed at promoting fair labour practices, thereby ensuring that labour relations in the commercial agricultural sector remain sound. The AEA strives to assist members in resolving labour disputes as expeditiously as possible.

Labour documentation

The sale of labour documents to members and non-members is as popular as ever, an indication that employers are keen to follow correct administrative systems. The AEA management strives to keep the prices of all documentation as inexpensive and affordable as possible. Only the price for a copy of the Labour Act Manual has been adjusted for the 2025/26 financial year.

TRAINING

Farm worker training

The training of farm workers remains a priority for the AEA and available courses are advertised to members in the NAU Newsletter. The uptake has been slow and, with the NMW adding to members' financial burden, there is not much hope that already strained budgets will allow for formal training.

Personnel Management Course for Young Farmers

The AEA contacted the NAU Young Farmers' Committee to determine their need for a personnel management course to be offered by HR consultant Mr Roland Zirzow. Young farmers expressed interest; courses are to be scheduled at a convenient time.

NTA (National Training Authority)

The AEA obtained a list of vocational training centres (VTCs) offering agriculture as a subject. The NTA also enquired whether there is a need for practical training or internship programmes for students on nearby commercial farms. Furthermore, the NTA's partners are busy developing two new agricultural training qualifications, the so-called work-integrated learning (WIL) training project under which apprentices will also be accommodated on farms for practical training. Further details still need to be clarified.

EXTERNAL LIAISON

Ministry of Labour, Industrial Relations and Employment Creation

Contact with the Ministry of Labour was disappointingly infrequent during 2024 and 2025, despite the fact that many urgent labour issues affecting the agricultural sector were addressed in writing and needed to be negotiated.

As of 21 March 2025, the government appointed a new Minister for the merged Ministry of Justice and Labour Relations, namely Honourable Fillemon Wise Immanuel. Whereas one Executive Director had initially been appointed to the merged Ministry, 2026 started with a freshly appointed executive director for Labour only, Mr Ben Nangombe.

Social Security Commission (SSC) MSD Fund (Fund relating to maternity, sickness and death)

The SSC launched a new digital platform, *mySSC*, during 2024 to make it easier for rural farmers to do business with the SSC online. The SSC also increased the ceiling salary brackets for MSD contributions as from 1 March 2025.

Employee Compensation Fund (ECF)

Although much improved, complaints continue to be lodged with the AEA office regarding poor communication by the SSC with employers, as annual ECF assessments were often not received on time. When these complaints were taken up with senior SSC officials, the cooperation was good and problems were resolved quickly.

Proposed National Pension Fund

The Ministry of Labour's attempt to have the International Labour Organisation (ILO) pension model unilaterally approved by the government despite the fierce opposition from employers, did not bear fruit because the trade union federation (NUNW) also rejected the Ministry's pen-



sion fund model as the proposed benefits for their members would be less favourable than those of private pension funds. The AEA also provided further inputs on this issue via the NEF and it is hoped that the government will take into account the concerns of employers and workers in the final model to be presented.

Namibia Employers' Federation (NEF)

General Affairs

Danie van Vuuren again represented the AEA in the past year as a Council member and member of the Executive Committee of the Namibia Employers' Federation. The NEF serves as a united voice for employers who represent their interests in negotiations with government and other role players. The NEF provides input regarding legislation, policy and practices within the labour field that affect the business environment and where a united voice of employers carries more weight than the voice of one sector only.

Labour Advisory Council (LAC)

The NEF also has representation on councils and committees of the government including the LAC, where all labour-related legislation and regulations are deliberated before finally being forwarded to government for approval. The draft new Labour Act is currently with the LAC for consideration and recommendation to the Ministry of Labour. Although consensus was reached on most of the legislation, there are four proposed amendments with outstanding consensus affecting businesses negatively which are unacceptable to employers.

Affirmative Action (AA)

Legislation became stricter for small enterprises when the reporting threshold was lowered from 25 to 10 workers. Following negotiations by the AEA with the AA Commissioner, an abbreviated feedback form was made available for employers with 10 to 19 workers.

Furthermore, the government is in the process of replacing the existing AA legislation with a new Employment Equity Bill. Although the AEA has provided input on this proposed law via the NEF, this piece of legislation is viewed as discriminatory and inappropriate.



AEA CONGRESS 2025

The theme of the annual congress was "Mental Health on Farms" and drew 65 delegates from 48 farmers' associations. Thinus Pretorius, NAU President, in his opening address noted that unemployment remains one of Namibia's biggest challenges. He also emphasised that minimum wages have a significant impact on employment levels and that a balance must be struck between a living wage and sustainable job creation.

Wimpie Vernooy's keynote address on mental health was eye-opening and alerted members to the importance of checking on the state of mind of everyone on the farm. A complete list of organisations and counsellors for future reference was shared with the members.

After group discussions on the NMW, the feedback from members was clear: in its current form, the national minimum wage is not sustainable and will not work. The congress mandated its management team to negotiate with government for the inclusion of farmworker benefits in the national minimum wage (cash wage); and should this avenue be blocked, legal opinion should be obtained with a view to possible legal action.

On the issue of undocumented foreign nationals working on Namibian farms, which led to threats by the Minister of Home Affairs to imprison employers, the congress mandated management to urgently obtain clarity on the matter and seek a moratorium on prosecution until such time as government has documented foreign nationals.



AGRONOMY PRODUCERS' ASSOCIATION



Chairperson: Gernot Eggert

PERFORMANCE BY SECTOR

White Maize

Namibia produced about 31,990 tons of maize during the period observed and imported 265,258 tons of maize, meaning local production consisted of only 12% of total demand which stood at 297,248 tons. Poor rainfall negatively affected the production of white maize for the 2024/2025 season. As a result, the recorded figures of white maize production from April 2024 to March 2025 were recorded close to 50% less than the the marketing figures during the same period in 2023/2024.

The white maize price per ton averaged around N\$7,386 per ton during the corresponding marketing season.

Wheat

Namibia also recorded a significant decline in local wheat production of which only 3,557 tons were harvested from 692 hectares planted. Compared to the 2023 period, this was a more than 80% decline in production. This was mainly influenced by the low water levels of the Hardap Dam, where irrigation supply had to be suspended. As a result, Namibia imported 149,601 tons of wheat, accounting for 98% of consumption.

Producers received on average N\$7,453 per ton, demonstrating an increase in price of 6.89% compared to the previous season.

Groundnuts

The production of groundnut especially on irrigated land increased, leaving the estimated production for the 2024/2025 season at 4,000 tons, and the price at N\$ 17,000 per ton. A good number of producers diversified to groundnut production during the 2024/25 season, increasing estimated production by 233%.

STRATEGIC PLANNING FOR AGRONOMIC SECTOR

The APA held a strategic planning session in August 2024 and identified core topics for the

year ahead. Key priority areas were identified for the ensuing 3 to 5 years, these included the topics of fertiliser, electricity, chemicals, fuel, seed and labour.

PROJECT FUNDING BY NAMIBIA AGRONOMIC BOARD

Project funding is the government's financial support made available to all organisations in the agricultural sector based on applications for projects that benefit the broad agricultural community and specifically the agronomic industry.

The APA projects received a total amount of N\$2.8 million (N\$720,000 per year) from NAB for the years 2019/2020, 2020/2021, 2021/2022 and 2022/2023 which were all depleted during the stipulated times as per the signed contract. By December 2025, all the 2024-funding was to be utilised.

GENETICALLY MODIFIED MAIZE (GMO)

The APA supported a producer in his application to the Ministry of Environment, Forestry and Tourism for a Strategic Environmental Assessment (SEA) and to the Bio-Safety Council

for the necessary permits to allow cultivation of selected GM maize strains in Namibia. The step-by-step process has been outlined and is available for producers.

STAKEHOLDER ENGAGEMENTS

National Agronomy Advisory Committee (NAAC)

The APA serves as a member of the National Agronomy Advisory Committee (NAAC) administered by the Namibia Agronomic Board (NAB). The key issues deliberated at the NAAC meetings include trials (sesame seed trials, wheat trials), wheat and maize marketing, Local Gap for the agronomy sector and as an advisory committee they strive to recommend solutions and matters for decision making to the board.

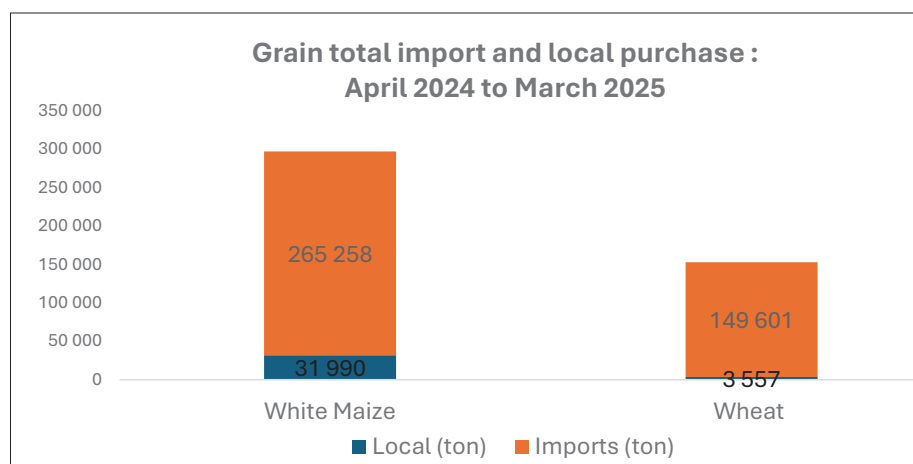


Figure 1: Estimated imports and local purchase of grains in tons for 2024/2025
Source: Namibia Agronomic Board

... AGRONOMY PRODUCERS' ASSOCIATION



B2Gold Namibia is this year's white maize producer of the year. Namasiku Nalisa, corporate communications officer at B2Gold Namibia, received the certificate from Warden Simushi, Zambezi regional council chairperson.



The Uvhungu Vhundu Green Scheme Irrigation Project from the Kavanago production zone is this year's wheat producer of the year. Uvhungu Vhundu's farm manager, Floris Smith (left), received the certificate from Salomo Mbai, NAB board member.

The Namibia Agronomic Board

The Ministry of Agriculture, Fisheries, Water and Land Reform appointed a ten-member team to lead the Namibia Agronomic Board in July 2023. The board tenure is for three years, ending June 2026. Current board members include:

- Hubertus Hamm (Chairperson)
- Marina Muller (Vice Chairperson)
- Gerhard Engelbrecht (APA Chairperson)
- Peter Kawana
- Salomo Mbai
- Sonja Molebugi
- Maria Pogisho
- Violet Simataa



LPO

LIVESTOCK PRODUCERS' ORGANISATION

CHALLENGED BY DROUGHT

In 2024, our greatest challenge came in the form of the worst drought in over a century. By June 2024, the situation for livestock producers across the country was critical and it was a fight for survival for farmers and communities alike.

But we all shared the same hope – rain. And that is what came. In November 2024, the heavens finally broke open with the first rain. The long-awaited downpour that fell in the months that followed, revived pastures, brought relief and filled dams. A new cycle for grazing and herds to recover. A divine refreshment for the soul.

MARKETING

Marketing figures in 2025 reflected the effects of the drought. Cattle marketing in the first quarter decreased by 58%, sheep marketing by almost 42% and the goat industry recorded a decline of 10%. Herd numbers were drastically reduced in 2024 and farmers are now holding animals back to rebuild herds.

While we can now bask in the lovely sight of beautiful grasslands and fattened animals, we cannot rest on our laurels. Now is the time to build resilience by implementing climate-smart practices and regenerative agriculture. We are not just recovering, we are preparing. We must adapt, innovate and remain vigilant as we rebuild stronger and prepare for whatever comes next.

The drought and corresponding emergency marketing to our South African neighbour, brought tensions to the fore with South African sheep producers. These producers also experienced a critical time and the emotions were therefore understandable. The LPO's research however, exposed a stark reality: most of the Northern Cape abattoirs rely on Namibian lamb to ensure sufficient throughput. The same situation applies to weaners. Hence the LPO's concerted effort over the past year to understand the challenges and to address these with role players, not with

defensiveness, but with respect and a willingness to jointly seek solutions.

STRATEGY

Cirrus Capital were appointed to develop a business plan for the sheep sector. South Africa remains a valued and essential market, but diversification and domestic value addition is critical. The most profitable path lies in exporting bone-in lambs to the EU. This insight has prompted the exploration of a producer ownership model at Farmers Meat Market in Mariental and will enable the expansion of export markets in the long term.

Meatco remains critically important to the cattle industry and must function as a transparent, independent institution for all producers. New export abattoirs create greater opportunity for value addition, job creation and the export of a proudly Namibian product.

ANIMAL HEALTH STATUS

Protecting Namibia's long-standing World Organisation for Animal Health (WOAH)



LPO Chairman: Jako van Wyk

foot-and-mouth-disease (FMD) free status remains central. The LPO is involved and supports the Directorate of Veterinary Services (DVS) and the LLPBN in their efforts to prevent this virus from entering Namibia's borders. Prevention remains a priority, but Namibia should be ready to stop a potential outbreak in its tracks.

DVS is seen as the best of its kind in Africa. The LPO supports its efforts to protect and improve the country's animal health status. Together we will continue to build a future where Namibian livestock not only survive, but thrive.



PPAN

PIG PRODUCERS' ASSOCIATION OF NAMIBIA

Updated figures from the LLPBN reflect encouraging growth in the pork sector. From January to June 2025, Namibia formally slaughtered 25,508 pigs, marking a 3.27% increase over the same period the previous year. A significant portion of this growth, 23,670, came from Mariental and Haloli while 1,838 pigs came from other producers. This year-on-year increase is a positive sign that Namibia's pork numbers are growing, though we are still far from being self-sufficient.

EXPORTS AND IMPORTS

Currently, Namibia only covers about 45% of local consumption. With the border to South Africa still closed due to Foot-and-Mouth Disease (FMD), Namibia is importing from Europe. In 2024, Germany was our primary source, but an FMD outbreak caused their exports to drop from 1,944 tons to just 338 tons in the first half of 2025. This gap was successfully filled by Spain, which increased its exports to Namibia from 658 tons to 1,567 tons during the same period. The remaining tons of imported pork came from other European countries (Belgium, France, Den-

mark, Portugal and Netherlands) as well as the UK and China. Total imports for Jan to June 2025 stood at 3,470 tons of which offal accounts for many of these imports at 51.4%, followed by cooked and processed pork at 30%.

PORK MARKETING SCHEME

The ceiling price for producers was pegged at N\$51.03/kg for three years. While this is the highest producer price globally, it was not sustainable for small-scale producers due to their economies of scale and high feed costs. In February 2025, the LLPBN hosted a meeting with small-scale producers to create a new feed-based model for calculating the pork ceiling price, which would better represent their cost-covering concerns. Although the initial projections put the ceiling price at N\$57.00/kg, the drastic drop in international maize and soya prices lowered the feed component, resulting in a final ceiling price of N\$52.93/kg effective since August 2025 and subject to quarterly updates going forward.



Chairperson: Gideon Goosen

ANIMAL HEALTH STATUS

South Africa's FMD challenges, preventing SA from exporting to Namibia for longer than three years, present opportunity. With the combined drive of the LLPBN and the Namibia Investment, Promotion and Development Board (NIPDB), local production can be increased to lessen Namibia's dependency on imports, working towards a more self-sufficient future.



NAPHA

NAPHA Annual Report – an extract



NAPHA President: Axel Cramer

Despite global instability, Namibia continues to stand as a nation defined by peace, unity, and stability. This year, the country reflected on the life of the late H.E. Dr. Sam Nujoma, honouring his foundational leadership, while also celebrating a new milestone with the inauguration of H.E. Dr. Netumbo Nandi-Ndaitwah as Namibia's first female President. Her background in environment and tourism offers confidence in continued national progress and unity.

The Namibia Professional Hunting Association (NAPHA) redesigned its website to improve accessibility and member engagement. The new platform features a clearer mission statement, updated conservation-hunting information, an active news section and a secure membership portal with NAPHA documents, circulars, and permit resources. Marketing efforts have shifted toward international audiences, prioritising high-quality, ethical-hunting content. Future communications will drive traffic directly to the new website.

NAPHA SCHOOL OF CONSERVATION

From September 2024 to August 2025, NAPHA hosted ten professional training courses with 128 participants. Key programmes included the Previously Disadvantaged Namibians (PDN) Hunting Guide Course, first aid training, and a German language course supporting client communication. With the passing of Royston Wright, whose facilities hosted training, NAPHA is exploring the establishment of its own premises to ensure long-term sustainability. A pre-feasibility study will assess financial viability and potential partnerships.

EXTERNAL AND INTERNAL LIAISON

NAPHA invested considerable time engaging with media to enhance national awareness of conservation hunting. Participation in the

Dallas Safari Club Convention strengthened international partnerships and secured continued sponsorship of membership cards. Representation at multiple platforms reinforced Namibia's reputation as a leader in ethical, sustainable hunting.

Through its seat on the Federation of Namibian Tourism Associations (FENATA) Board, NAPHA contributed to sector-wide efforts to address challenges such as visa-on-arrival processes. NAPHA developed multilingual visa guidelines now widely used in the tourism sector. FENATA also consulted MEFT on the National Tourism Spatial Development Master Plan, focusing on sustainable tourism growth, environmental protection and improved infrastructure.

The International Council for Game and Wildlife Conservation (CIC), the Hanns Seidel Foundation and Krieghoff International remain key allies. CIC's advocacy continues to counter international trophy import bans, while Krieghoff supported multiple NAPHA initiatives and sponsored the 2024 Gala Dinner rifle auction. NAPHA also strengthened ties with international media, especially through JAGDZEIT International, which sponsored full-page advertisements and promoted Namibia's ART Measurement Method.

NAPHA maintains a strong working relationship with the Ministry of Environment, Forestry and Tourism (MEFT) through ongoing correspondence and weekly visits to facilitate permit processing. The association provided support for Namibia's drought-relief communications and advocated for clarity on problem-animal procedures, resulting in an official MEFT statement. In 2025, NAPHA conducted a dedicated PDN training course and continued to disseminate MEFT notices to members.

NAPHA worked with NAU on topics including double-fencing and foot-and-mouth disease, assisting members with MEFT-related queries.

NCE remained a steadfast partner, producing the *Namibia Wildlife Economy* film series and responding to misinformation on giraffe hunting with scientific data.

NAPHA also strengthened cooperation with the Namibian Police to improve firearm procedures and successfully extended temporary rifle import permit validity over the 2024 festive period.

The Namibia Tourism Board (NTB) promoted HuntNamibia at the airport and will co-exhibit with NAPHA at Jagd & Hund Trade Fair in Dortmund, Germany, during 2026.

The Namibian Association of CRNBM Support Organisations (NACSO) remained a strategic associate, where NAPHA emphasised the economic and conservation value of professional hunting in communal conservancies.

NAPHA also maintained a strong presence at Safari Club International in Nashville, Jagd & Hund Trade Fair in Germany and Hohe Jagd & Fischerei in Austria. These engagements helped reinforce global confidence in Namibia's conservation-hunting model and supported industry partnerships.

HuntNamibia remained a key marketing tool, though U.S. print distribution was challenging. Future U.S. engagements may rely on QR-coded signage rather than bulk print shipments.

... NAPHA Annual Report



The newly elected NAPHA executive committee. From left are Jacques Strauss, Hannes du Plessis (newly elected president), Harm Woortman, Alexander Rogl and Sigurd Hess.

NAPHA is developing a digital system with HuntAdmin to streamline permit applications, automate reminders, store documents and simplify annual returns to MEFT. This tool will reduce paperwork, improve compliance and support accurate national reporting.

NAPHA met with the German Embassy to discuss the sector's role and future opportunities. It also hosted a Polish delegation exploring collaboration on advocacy and market diversification. Opportunities were identified for stronger ties with European networks such as FACE and CIC.

CONCLUSION

The past decade has shown that NAPHA's strength lies in its members. The association continues to uphold ethical and sustainable hunting while representing Namibia on national and global platforms. With unmatched natural landscapes and a strong conservation framework, Namibia's hunting sector depends on professionalism, unity and shared commitment to high standards. NAPHA remains committed to stewardship of wildlife, support for its members and promotion of Namibia as a world leader in conservation hunting.



CAoN

CHARCOAL ASSOCIATION OF NAMIBIA

The Charcoal Association of Namibia (CAoN) serves as the representative body for Namibia's charcoal industry and has been an affiliate member of the Namibia Agricultural Union (NAU) since its inception. The Association coordinates and supports unified industry positions in engagements with national and international regulators and provides guidance to both new entrants and established producers on production, processing and trade – locally and for export.

MEMBERSHIP OVERVIEW

CAoN's membership is primarily built around charcoal processors, who report their trade volumes, identify suppliers and pay levies per ton of traded charcoal. These levies form the foundation of the Association's membership roll.

Currently, CAoN consists of approximately 20 processor members, supplied by an estimated 650 active producers. Because producers often operate seasonally, those not actively supplying during a 6 to 12-month period remain on the membership roll. This brings the combined total of active and dormant producers to approximately 1,400. In addition, CAoN represents the interests of foreign traders and associate members across the broader value chain.

The Namibian charcoal industry provides an estimated 11,000 jobs, contributed roughly N\$1.5 billion to GDP in 2024 and was pro-

jected to export approximately 250,000 tons of charcoal in 2025. As a result, CAoN and the industry continue to attract growing attention from government as well as domestic and international investors.

MEMBERSHIP SERVICES AND ADVOCACY

Throughout 2025, CAoN continued delivering its established portfolio of member services. These include support with compliance processes ranging from administrative assistance for permit applications to the development of full environmental clearance certification for larger producers.

During the reporting period:

- 72 biomass inventories (bush counts) were conducted.
- Many inventories resulted in the development of Forest and Environmental Management Plans and Environmental Clearance Certificate applications.
- Approximately 500 individuals received on-farm charcoal production training.

This training included eight farmers and formed part of a strategic collaboration between the Namibia Biomass Industry Group (N-BiG), CAoN and the National Youth Service. CAoN delivered its standardized five-day training on the one-day burn method, aimed at improving product quality and developing local

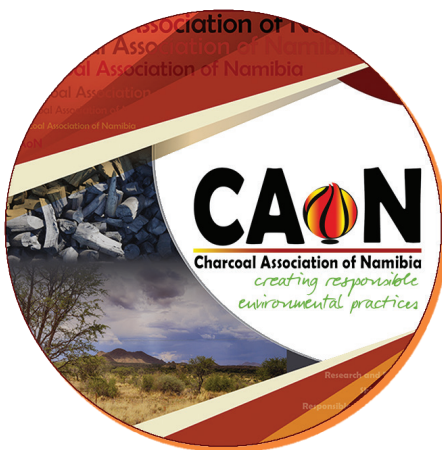


Chairperson: Koos Briedenhann

skills in this labour-intensive sector.

In 2025, CAoN also supported the voluntary trial implementation of the International Maritime Organization's revised regulations on the classification of charcoal as dangerous goods due to its self-ignition risks at sea. The Association facilitated technical consultations with the dangerous goods departments of major shipping lines such as Maersk and MSC.

Further, following H.E. Dr. Netumbo Nandi-Ndaitwah's directive that state institutions must consult the private sector on policy development, CAoN actively participated in approximately 10 policy and reform processes, including the ongoing reform of the Forestry Act.



CHARCOAL ASSOCIATION OF NAMIBIA

CURRENT AND FUTURE MARKET DYNAMICS

While Namibia's charcoal export market continues to grow, international consumer demand – especially in Europe – has softened. Over the past five years, FSC-certified charcoal has secured most of the European market at a price premium. In response, CAoN is working closely with producers and processors to diversify both product offerings and target markets.

EMERGING CARBONIZED PRODUCT MARKETS

- Organic coal from large-scale bush control is gaining interest for use in green steel production. Although expected high-volume trade did not materialise in 2025, demand is projected to increase in the next 18 to 24 months.
- Biochar production is attracting more investment, supported in part by the voluntary carbon credit market.
- CAoN is expanding its membership base to include stakeholders across all carbonized product value chains, including producers of by-products such as condensates and tars.

CAoN will also intensify its market research to identify additional off-take opportunities – both in traditional BBQ markets and rapidly growing climate-driven carbon markets.

QUALITY AND TECHNOLOGY TRENDS

Global demand for higher-quality carbonized products is rising, requiring innovation in both production methods and technology. This includes improvements to kiln-based processes and increased adoption of retort technology. CAoN is committed to supporting these developments, including mobilizing resources for industry-wide research and development.

As evidence of increased investor interest, CAoN is currently facilitating exploratory engagements with four international investors evaluating opportunities in Namibia.

DIVERSIFICATION, INCLUSION AND INTEGRATION

In response to evolving industry dynamics, CAoN's Board and Management have committed to expanding and diversifying membership, product lines and market segments. A priority area is the inclusion of communal farmers, who are increasingly engaging in bush control and seeking additional income opportunities – particularly in structurally disadvantaged regions.

CAoN remains committed to supporting the integration of communal and commercial farming interests, in alignment with the broader mandate of Namibia's farmers' unions.



PPA

POULTRY PRODUCERS' ASSOCIATION

EXTERNAL LIAISON

The poultry sector had several engagements with Government during 2025 and the LLPBN had a major impact on the poultry sector through its dedication and meetings. The implementation of levies ensured that the LLPBN had funding to police borders and implement stricter measurements to stop poultry smuggling.

The engagement with DVS regarding an Avian Influenza Master Plan was a major step forward and having submitted their response, the PPA is now awaiting feedback from the directorate.

Engagement with the Namibia Investment, Promotion and Development Board (NIPDB) regarding the poultry sector was outstanding. Concerns were discussed and new innovative ideas could be raised. Namibia imports 50,000 tons of yellow maize per year for the poultry sector, thus indicating a huge market and although Namibia has a Green Scheme in the north, the country still needs to import maize. More opportunities exist for a product like soya which could also be cultivated locally.

LOOKING INTO THE FUTURE

The poultry sector is growing and Kadila Poultry's first year of operation was very successful. Hochland Farms are expanding and busy completing their processing plant. This business started with only two hundred broiler chicks per week and will soon slaughter 30,000 broilers per week. Maranatha Poultry in Stampriet likewise is expanding, erecting broiler houses to be able to slaughter 100,000 broilers per week. With their own broiler breeder operations and hatchery, they will be fully integrated and will supply themselves and contract growers with day old broilers.



Chairperson: Louis Kleynhans

GROWTH IN PRODUCTION

The SME market is also growing and currently produces 60,000 broilers per week.

The eggs sector is stable with the only challenge being the import of day-old and point-of-lay layers. The Avian Influenza outbreaks in South Africa are and will continue to pose a risk for this sector as some producers in South Africa do not report outbreaks since there is no compensation for losses for them.

The health status of the Namibian poultry sector remains good with no current challenges.



SBN

SWAKARA BOARD OF NAMIBIA

PELT SALES

On 9 March 2025, Swakara held a highly successful pelt auction at Swakara Furs in Helsinki, Finland. A total of 7,746 pelts were sold, including 861 white pelts sold privately to Fendi. This represents a slight 1% decrease from the 7,835 pelts sold in 2024. However, the overall average price surged to €51 (≈ N\$1,075), marking a 98% increase from €25 (≈ N\$527) in 2024.

- White pelts: €85 (≈ N\$1,792) compared to €61 (≈ N\$1,286) in 2024.
- Black pelts: €32.50 (≈ N\$685) compared to €21.44 (≈ N\$452) in 2024.
- Strong buyer competition created a highly positive atmosphere, signaling renewed global demand for Swakara product.

Due to late lambing, the September 2025 auction was not attended. The closing date for Namibian farmers to submit pelts was 7 November 2025, with an estimated 4,500 pelts from 41 producers prepared for the March 2026 auction. Many producers raised all ewe lambs to rebuild stock after years of below-average rainfall.

SWAKARA INDUSTRY FORUM

The annual Swakara Industry Forum was held in September 2025, with broad participation from producers, breeders and international stakeholders. Discussions focused on strengthening resilience, rebuilding stock and positioning Swakara in global markets. The next forum is scheduled for September 2026.

SWAKARA BREEDERS' SOCIETY

The Swakara Breeders' Society Auction took place in September 2025 in Keetmanshoop.

- On offer: 16 rams (8 white, 8 black) and 30 ewes (6 registered black, 12 registered white, 12 flock ewes).
- Prices were very strong, reflecting renewed

interest in superior Swakara genetics.

- The auction reaffirmed breeders' commitment to strengthening the genetic base and supporting communal farmers' access to quality stock.

FURMARK AUDIT AND CERTIFICATION

The FURMARK certification process for 2024 concluded in January 2025, with all Swakara farms successfully passing group certification.

- The next certification cycle commenced in December 2025, with current certification expiring on 28 January 2026.
- Baltic Control (Denmark) was appointed to conduct third-party audits in January 2026, ensuring continued compliance with international animal welfare and sustainability standards.

SWAKARA WOOL

A Swakara wool credit facility was finalized between the Swakara Board and the Stampriet Mill, securing an average price of N\$40 per kg and guaranteeing timely farmer payments.



Chairperson: Julene Meyer

- By November 2025, the facility had entered its third round of payouts, strengthening farmer confidence.
- The mill reported satisfactory sales and anticipates further demand growth, driven by both established carpet weavers and new weaving operations.



GLOBAL FUR MARKET TRENDS

The global fur market showed mixed signals in 2025:

- **Sojuzpushnina (Russia):** March auction ranked among the best in recent years, with 177,039 farmed sable pelts averaging €135 (≈ N\$2,849) and 164,257 wild sable pelts averaging €133 (≈ N\$2,803).
- **Saga Furs (Finland):**
 - March 2025 auction sold 2.6 million pelts (2024: 3.0 million), totaling €96 million in brokerage sales.
 - Mink pelts: 84% of 2.8 million offered were sold, continuing a positive price trend.
 - Fox & Finnraccoon pelts: 70% sold, but prices remained unprofitable for producers.
 - June 2025 auction achieved €127 million in sales, with 92% of 3.9 million mink pelts sold but only 39% of 200,000 fox pelts.
 - Demand was dominated by China, with encouraging increases in South Korea, Türkiye, Greece and Europe.

Saga Furs CEO Markus Gotthardt noted that while mink sales were strong, fox pelts remain challenging. However, fashion weeks showed increased use of fur, signaling renewed interest from Western fashion houses.

CONCLUSION

The Swakara industry in 2025 demonstrated resilience and growth despite challenges.

- Pelt prices nearly doubled, with white pelts achieving record averages in both Euro and NAD terms.
- Wool demand strengthened, supported by the credit facility ensuring farmers receiving good income from Swakara wool.
- Breeder auctions attracted strong prices, reinforcing genetic improvement and communal farmer inclusion.
- FURMARK certification upheld international sustainability standards, enhancing Swakara's global reputation.

Overall, the industry remains on a positive trajectory, balancing tradition with innovation and ensuring long-term stability for producers.





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