

# Fiji Livestock Strategy

# DRAFT STRATEGY

December 2015

Suva, Fiji



**SPC**  
Secretariat  
of the Pacific  
Community

# PHASES OF STRATEGY PREPARATION

Assessment

Where are we now and why?

Vision and Goals

Where do we want to be?

Component Activities

How do we go from here to there?

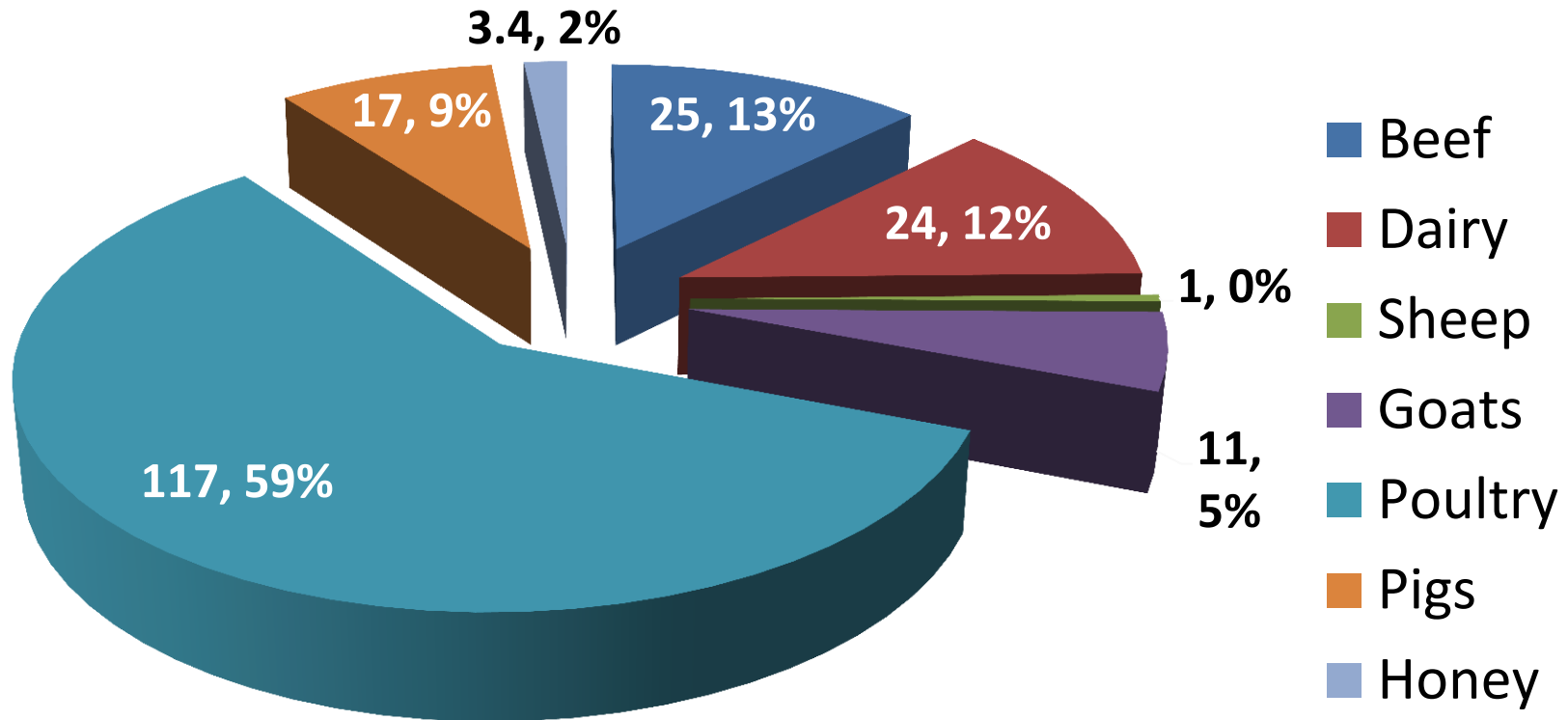
Implementation

Who is driving?  
What resources needed?

# **ASSESSMENT: KEY ISSUES**

# Farmgate value of Livestock Sector

## FJD million, % (2012)



**TOTAL \$198.4 million**

ISSUES	STRATEGIES
1. Skills are limited	Capacity building
2. Lack of capital	Improve access to capital
3. Animal feed – cost and quality	Reduce import costs Develop domestic industry
4. Support services are limited	Improve service delivery
5. Farmers need land	Improve access to land
6. Business enabling environment - compliance	Regulation, monitoring, protection, enforcement
7. Lack of infrastructure	Develop infrastructure on-farm, market access, and agribusiness
8. Declining competitiveness	Improve domestic industry competitiveness
9. Risks from climate change and disasters	Risk management, adaptation, response

**Where do we want to be?**

# Vision 2025

Livestock Fiji

# Agriculture 2020

- *“A diversified and economically and environmentally sustainable agriculture economy”*

## Roadmap for Democracy and Socio-Economic Development

- *“Sustainable community”*



# VISION:

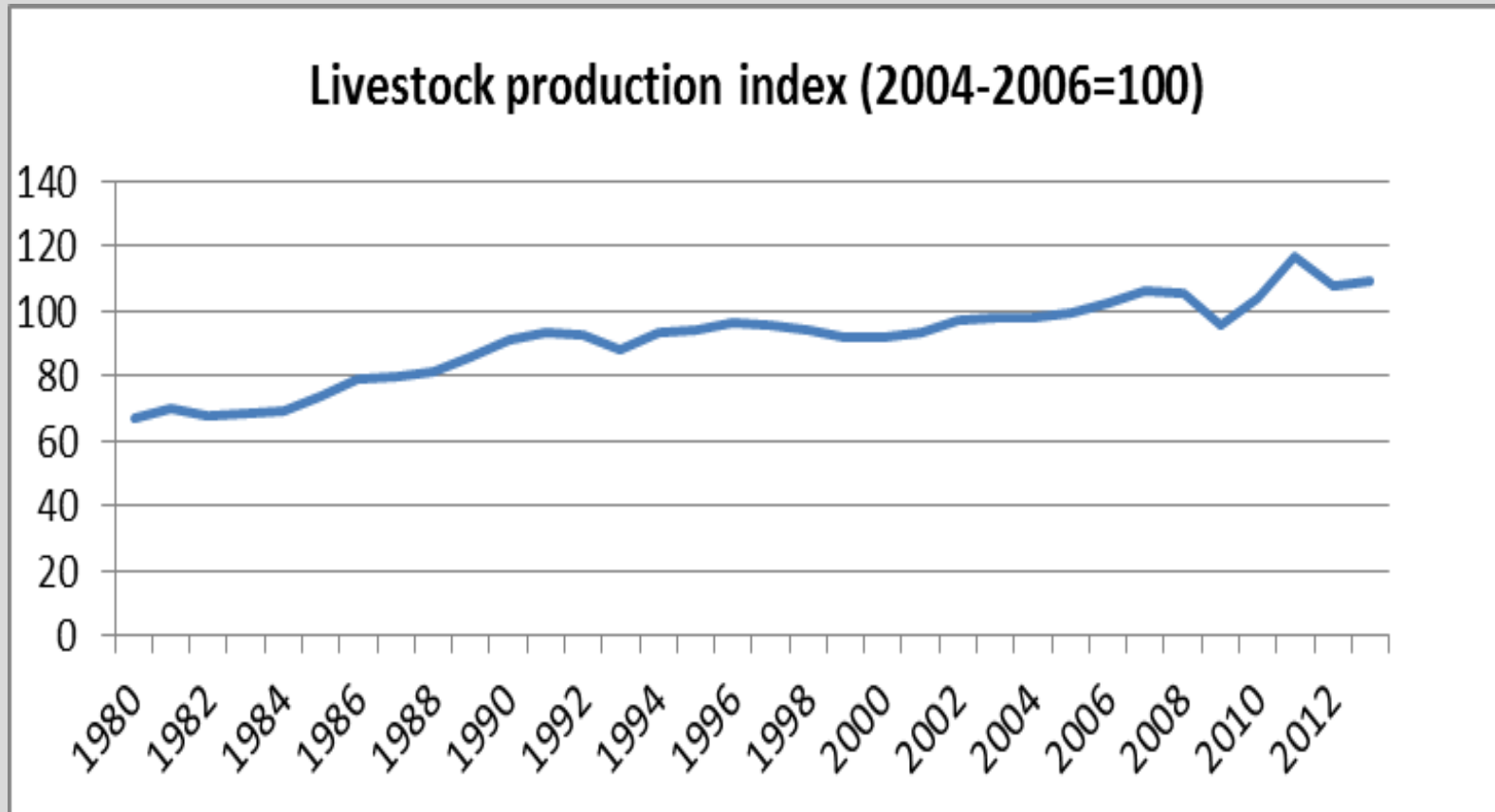
“The livestock sector, **led by industry** and government, will comprise **modern, competitive value chains** that are **sustainable, resilient** and diverse, providing **livelihood opportunity for youth and women**, and contributing to economic **growth and food security.**”

*(Fiji Livestock Sector Working Group).*

**How do we get from where  
we are to where we want to  
be?**

**Where do we start?**

# There has been improvement



Source: World Bank Metadata, accessed 17 Nov. 2015

# There are still productivity gaps

<b>Productivity Measure</b>	<b>Average Commercial</b>	<b>Fair Potential</b>
<b>Milk per cow, daily</b>	6 litres	20 litres
<b>Lambing rate per ewe</b>	1	1.5
<b>Calving rate</b>	43%	100%
<b>Piglets sold per sow, per year</b>	14	20

Source: Agricultural Census 2009 and industry estimates

# Ag Officers visit farms – but farmers don't go to the Ag Office much

Extension Type	Number of Farmers	Percentage of Total Farmers
Visited an agricultural office	16,820	26%
Attended a field day	5,835	9%
Visited by an agricultural officer	22,348	34%

Source: 2009 Agricultural Census Report, MOA

# Adoption rates are low

<b>Technology</b>	<b>Percentage of Total Farmers with Technology</b>
<b>New variety introduced</b>	11.4 %
<b>New livestock breeds introduced</b>	2.8 %
<b>Practising organic farming methods</b>	8.4 %
<b>Farms requesting a loan for technology</b>	6.0 %

# And few youth and women

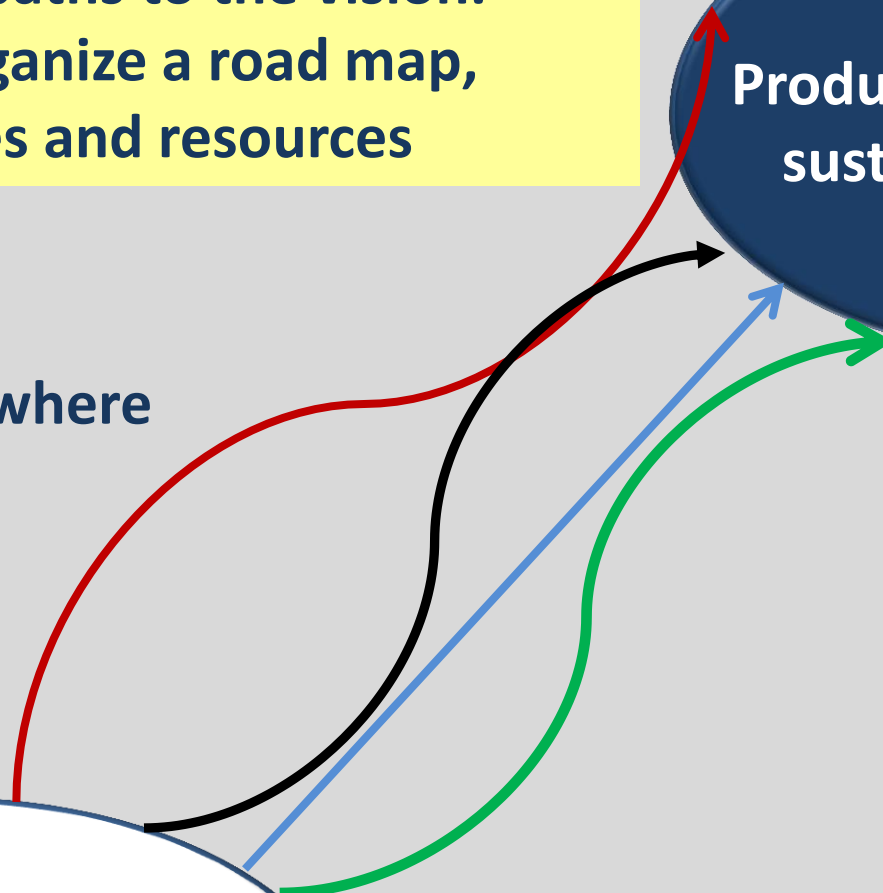
<b>Demographic</b>	<b>Number of Farmers</b>	<b>Percentage of Total</b>	<b>Agriculture College Education</b>
<b>Farmers aged under 20 yrs</b>	592	9.0 %	0
<b>Female farmers</b>		3.6 %	0
<b>Female paid farm workers</b>	15,080	7.0 %	n/a

**Many activity paths to the vision.  
We need to organize a road map,  
drivers, vehicles and resources**

**Assessment - where  
are we?**



**May 2015  
constraints and  
strategic options  
discussed**



**2025  
Productive, competitive,  
sustainable livestock  
sector**



**Vision - where  
we want to be?**



**What do we need for  
a successful  
Livestock strategy?**

**Good Strategy**

```
graph TD; A[Good Strategy] --> B[Adequate Resources]; B --> C[Implementation Capacity]; C --> A;
```

**Implementation  
Capacity**

**Adequate  
Resources**

**COMPONENTS...**

# Outcome Goals to Achieve Vision

## Improved Governance

“The capacity of government and industry organizations to design, formulate and implement programs, regulations and deliver services.”

## Competitive Value Chains

“Competitive agricultural value chains that increase value added and benefits to smallholder farmers and agro-enterprises.”

## New Generation Opportunities

“Livestock farming, industries and support services provide attractive opportunities for young people and women to earn income, gain skills, and follow rewarding careers in agriculture.”

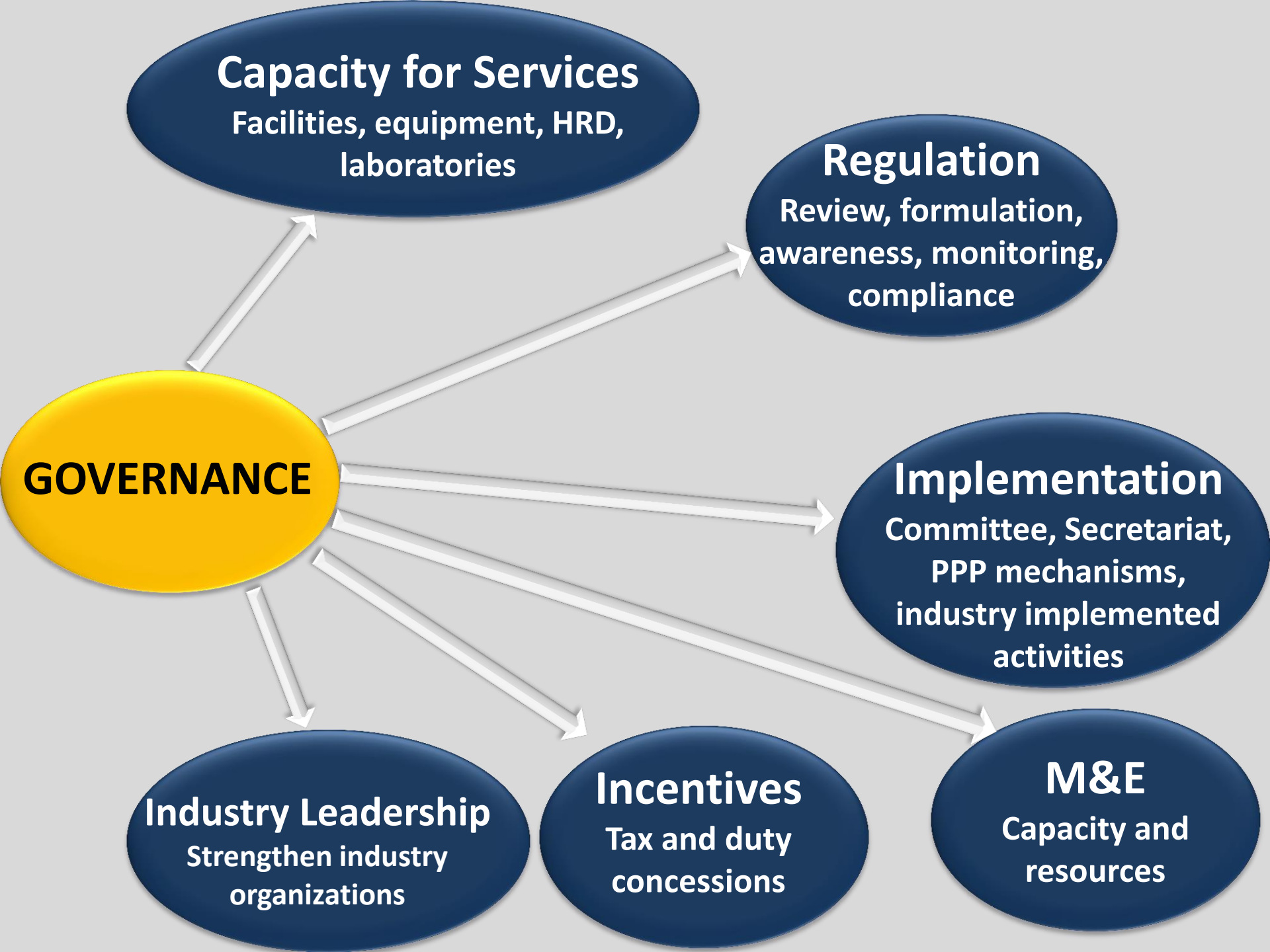
## Sustainability and Risk Management

“The livestock sector is resilient to climate change, disasters and other shocks, manages its natural resources sustainably and contributes to a healthy environment.”

<b>Outcome Goals</b>	<b>Indicator</b>	<b>Current Situation (2012 Stats)</b>	<b>Target 2020</b>
Improved Governance	Livestock GDP growth	3% pa	5% pa
Competitive Value Chains	Livestock products trade balance (kg)	-18,239,207	-16,970,255
	Total consumption of Livestock	\$213m	\$298m
New Generation Opportunities	Livestock labor productivity (livestock GDP/ employment in livestock)	\$23,613	\$25974
	Proportion of women employed in livestock farming and value chains	7%	30%
Sustainability and Risk Management	Nutritional contribution of livestock to food security – domestic supply of meat protein	53%	60%
	Growth in gross output of animal production	-0.4	>0

# **GOVERNANCE**

**The capacity of government and industry organizations to design, formulate and implement projects, regulations and deliver services**



# IMPLEMENTATION STRUCTURE

Agent	Role
<b>Livestock Strategy Implementation Committee (LSIC) (changed from LSSWG)</b>	<ul style="list-style-type: none"><li>• <b>Strategy Coordination</b></li><li>• <b>Membership comprising all relevant ministries and livestock industry organizations</b></li><li>• <b>Drive public sector reform</b></li><li>• <b>Program funding</b></li></ul>
<b>MOA</b>	<ul style="list-style-type: none"><li>• <b>Chair the LSIC</b></li><li>• <b>M&amp;E of the strategy</b></li><li>• <b>Activity implementation</b></li><li>• <b>PPP</b></li></ul>
<b>FCLC</b>	<ul style="list-style-type: none"><li>• <b>LSIC Secretariat</b></li><li>• <b>Advocacy</b></li><li>• <b>Awareness and representation</b></li><li>• <b>Some activity implementation</b></li></ul>
<b>Private Sector</b>	<ul style="list-style-type: none"><li>• <b>Investment</b></li><li>• <b>Production, processing and marketing</b></li></ul>



# COMPETITIVE VALUE CHAINS



CONTRACT GROWING OPERATIONS GROUP





One key idea for competitive value chains:

**FIX GAPS IN THE VALUE  
CHAIN**



# Market Infrastructure and Logistics

## Issues

- Insufficient investment;
- Small scale supply chain;
- Remoteness.

## Solutions

- Public investment with participatory planning and user's associations;
- PPP;
- CDD (community driven development).

## Establish Value Chain Programs that ...

- Are scalable;
- Promote good value chain governance;
- Invest adequate resources.

# Prioritize five value chains according to:

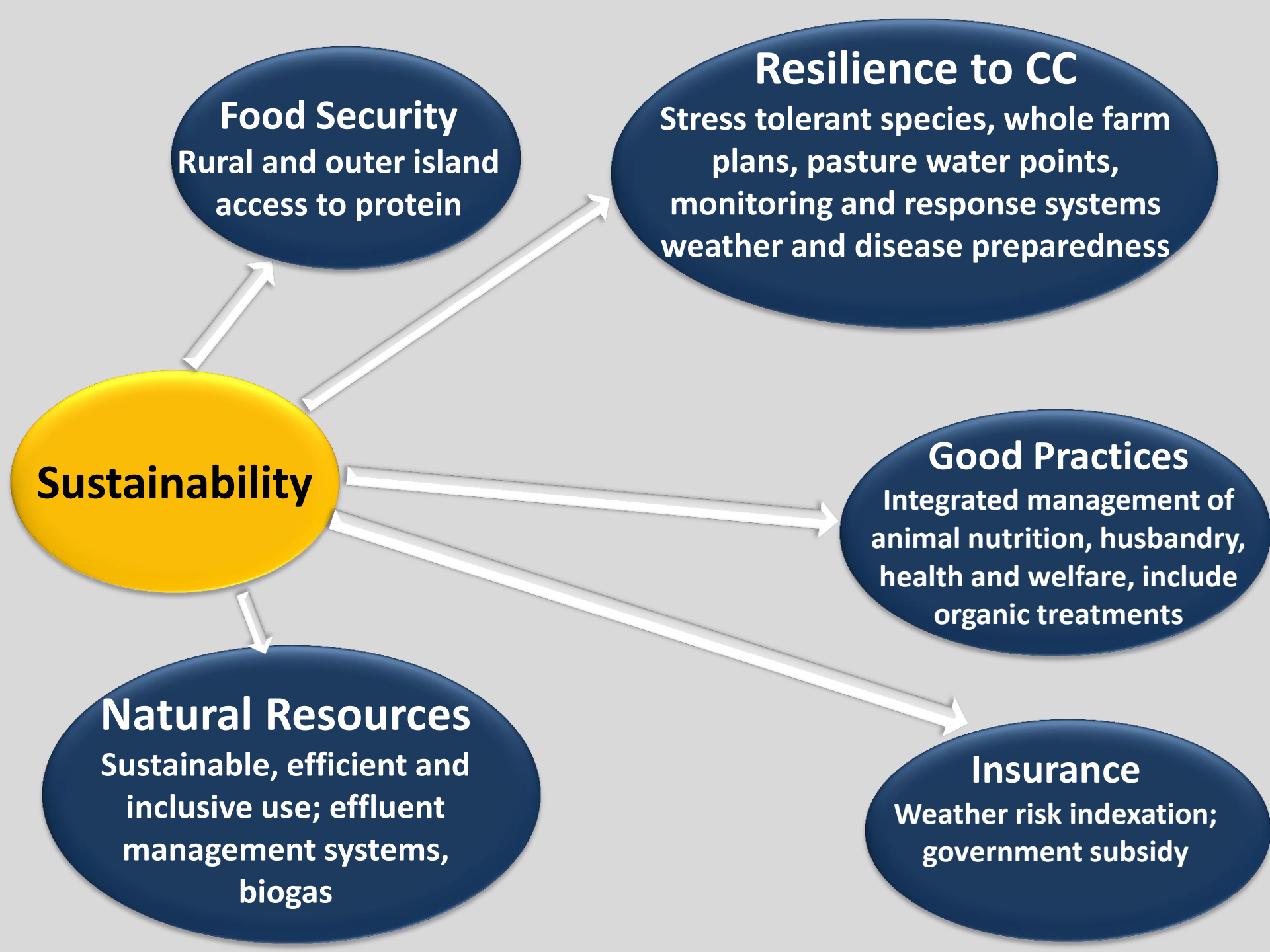
- Poverty reduction potential;
- Growth potential;
- Intervention potential;
- Cross-cutting issues.
- Economic contribution

Commodity/ Product	Rank
Feeds	1
Dairy	2
Beef	3
Pork	4
Goat	5
Bee products	6
Sheep	7
Poultry	8



# **SUSTAINABILITY & RISK MANAGEMENT**

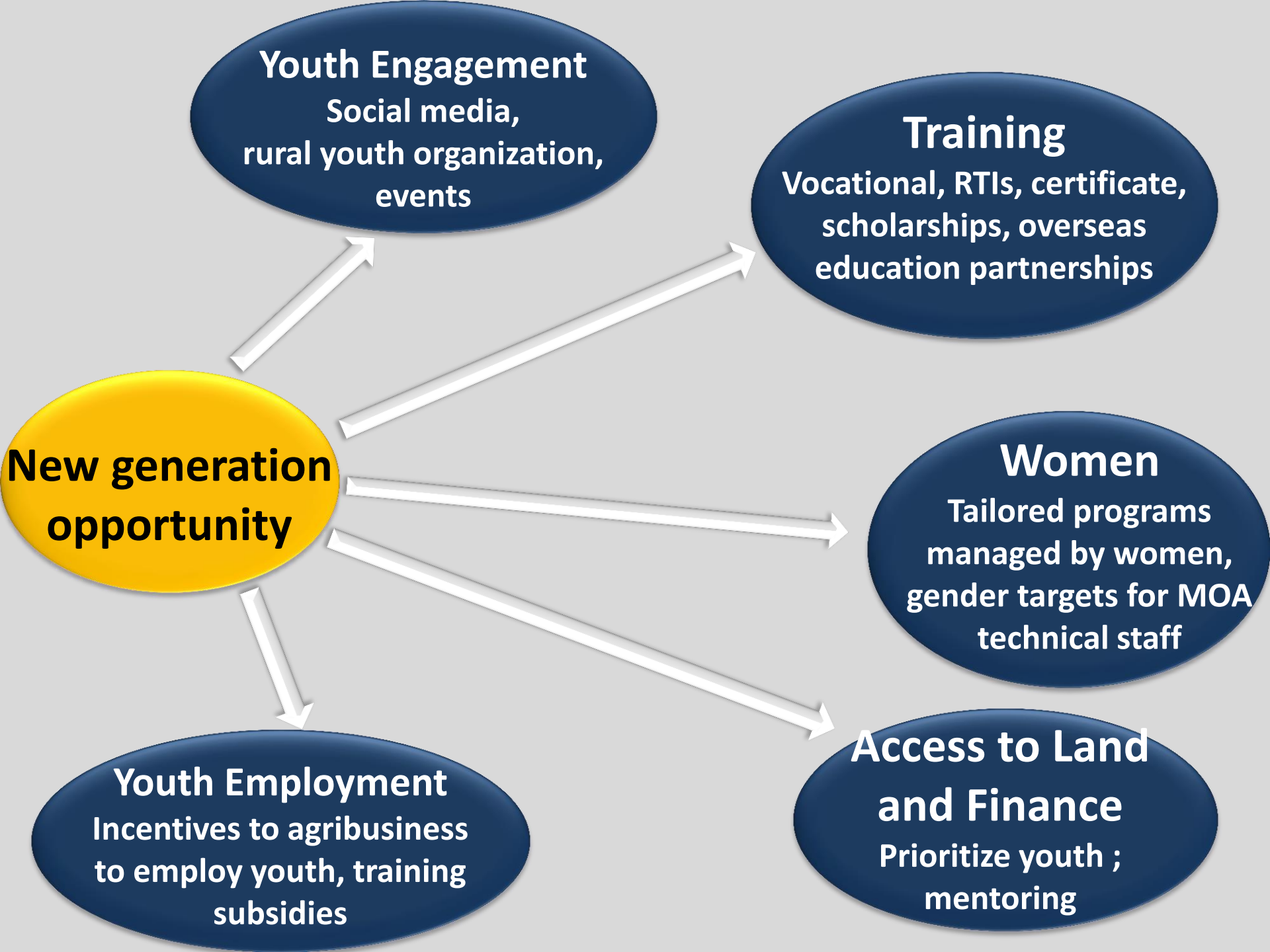




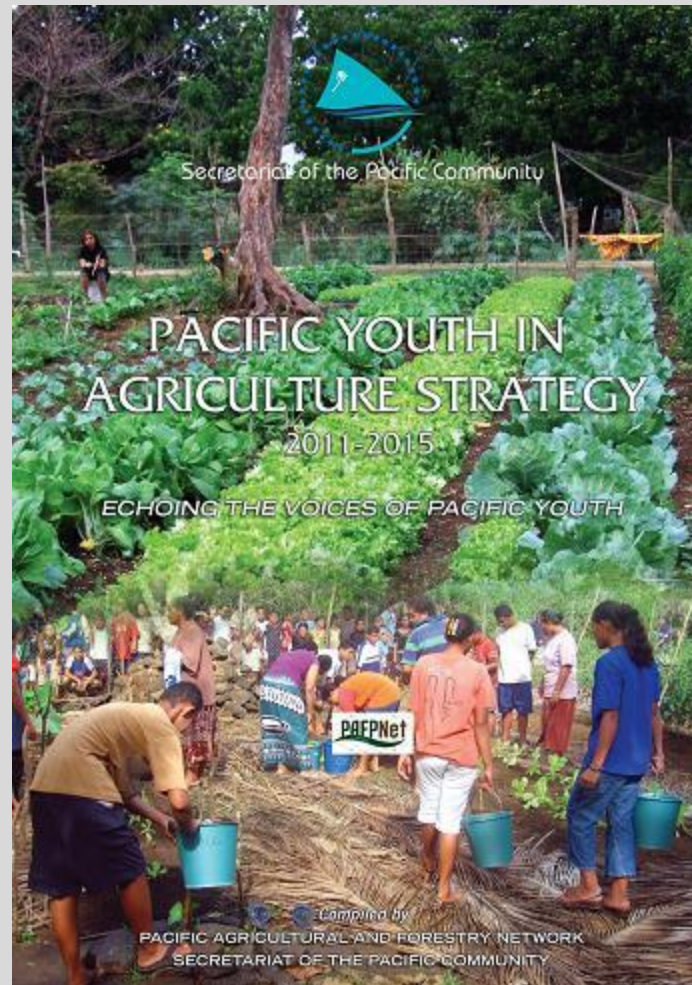
# **NEW GENERATION OPPORTUNITY**

**Smart agriculture  
is a rewarding  
livelihood**





# Link with other agencies



# Summary of Components

✓ **Governance**

✓ **Competitive value chains**

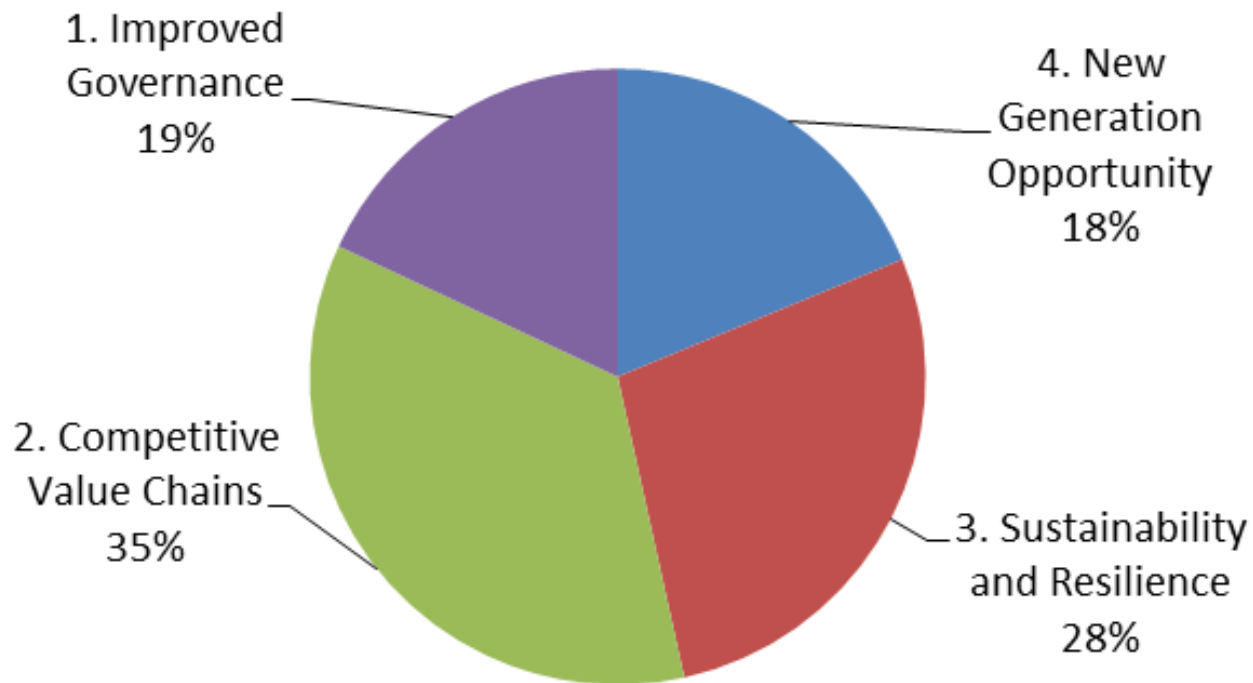
✓ **Sustainability and risk**

✓ **New generation opportunities**



# COST ESTIMATES

## Cost Estimate: FJ\$ 88.7 million



# Improved Governance

Outcome Goal	Output Objective	No. of Activities	Cost Estimate FJD '000
<b>1. Improved Governance</b>			<b>16,535</b>
1.1 Improved regulation		5	1,125
1.2 Industry leadership, inclusion and participation		2	205
1.3 Improved services capacity		4	1,505
1.4 Investment incentives		4	11,500
1.5 Effective implementation		2	2,200

# Competitive Value Chains

2. Competitive Value Chains				24,615
2.1	Innovation	6	5,950	
2.2	Quality and safety	4	1,025	
2.3	Business confidence	2	8,160	
2.4	Market development	4	7,800	
2.5	Finance	4	1,580	
2.6	Feeds	3	100	

# Sustainability and Risk Management

<b>3. Sustainability and Risk Management</b>			<b>30,930</b>
3.1 Improved resilience and risk management	3	12,700	
3.2 Sustainable use of natural resources	4	5,300	
3.3 Insurance	2	10,080	
3.4 Good practices	3	1,100	
3.5 Food security	3	1,750	

# New Generation

<b>4. New Generation Opportunity</b>			<b>16,000</b>
4.1 Youth engagement	2	1,000	
4.2 Youth employment	2	2,500	
4.3 Skills and competencies	2	3,000	
4.4 Inclusion of women	2	6,000	
4.5 Access to land and finance for youth and women	3	3,500	

# Key Priorities

- Governance
  - Effective implementation; Industry leadership; Services capacity
- Value Chains
  - Innovation; Quality & safety; Market development
- Sustainability
  - Improved resilience & risk management; Food security (local food systems)
- New Generation
  - Skills & competencies

# Key Risks

- Lack of policy ownership, commitment and structure for implementation
- Insufficient finance and resources (from both public and private sectors)
- Poor governance and lack of transparency in implementation