



in association with



WATERBERG SECURITY INITIATIVE



WILDSWINKEL

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# FMD Information Day

Knowledge is power and together we need to protect  
our Wildlife & Industry.

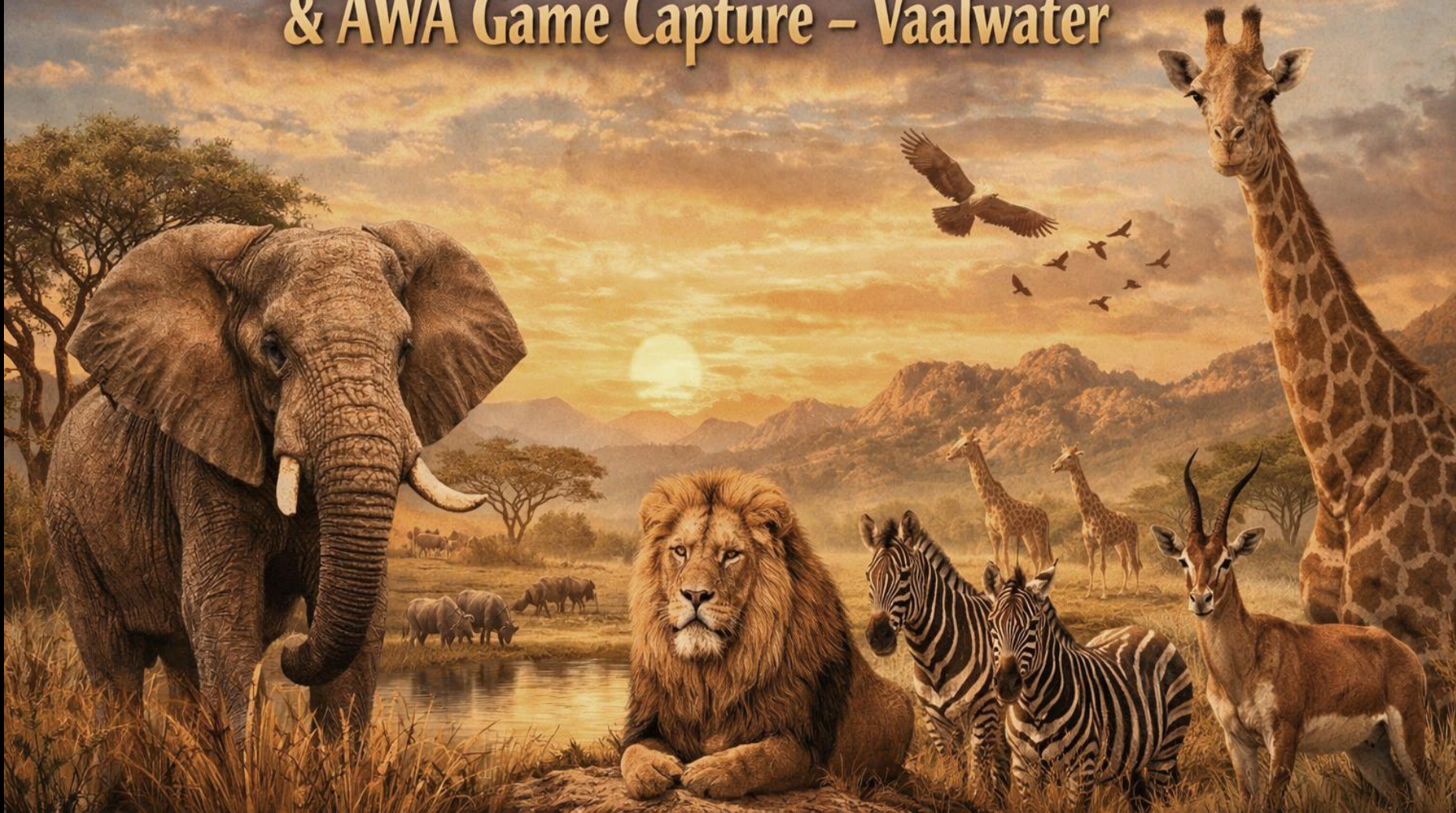
**What you need to know  
regarding FMD, Movement  
Protocols and Auctions**

**Saturday - 31 January 2026**

**10:00 | AWA, Vaalwater**



# FMD Protocol for African Wildlife Auctions & AWA Game Capture – Vaalwater





# Animal Movement & Admission Controls

## a. Pre-Movement Requirements

- ✓ AWA will only accept wildlife with a valid movement permit from the origin farm confirming an FMD safe zone. This is mandatory for all capture and delivery related wildlife coming to boma.
- ✓ We will support our clients by facilitating the application process for all necessary movement permits.
- ✓ AWA will not accept animals from provinces or areas under FMD restriction or Disease Management Area (DMA) unless cleared by the State Vet.

## b. Health Inspection Upon Arrival

- ✓ All animals arriving at AWA bomas will be visually inspected before offloading to ensure animals are healthy. This visual inspection is critical even if health paperwork is provided.



# Biosecurity Zoning

## a. Define Zones

- ✓ **Clean Zone:** Controlled and disinfected boma area holding auction-ready stock.
- ✓ **Auction & Office Zone:** Open area for Auction and office operations.

## b. Controlled Access

- ✓ Controlled personnel and vehicle movements between zones.
- ✓ All staff and visitors moving between zones will only do so following strict disinfection procedures.



# Disinfection & Sanitation Protocols

## a. Vehicles & Equipment

- ☑ All vehicles entering the property must be cleaned and disinfected at the designated disinfection point before entering or leaving.
- ☑ All AWAGC trucks and staff will go through the disinfection protocol when leaving to a clients farm for capture.
- ☑ All AWAGC trucks and staff will go through the disinfection protocol when leaving the bomas to deliver animals.
- ☑ AWA will issue a “FMD Spray Slip” to all vehicles that have gone through the disinfection spray booth on our premises. Thus confirming disinfection and traceability.
- ☑ All clients are recommended, where possible, to have disinfection stations at their farm gates before allowing any persons or vehicles onto their properties.

## b. Personnel

- ☑ All staff and visitors must use disinfectant tunnels when moving between zones.





# Health Monitoring & Reporting

## a. Daily Checks

- ☒ Conduct daily observation of animals.

## b. Immediate Response

- ☒ If any animal shows suspicious signs, immediately:
  - Isolate the animal
- ☒ • Notify the local State Veterinarian without delay
- Stop any movement of animals on or off the boma until clearance.



# Traceability & Record Keeping

Maintain detailed records of:

- ☑ Animal origins
- ☑ Health declarations
- ☑ Movements on & off property
- ☑ Spray Station Slips

These records are essential for trace-back/  
trace-forward investigations if an outbreak occurs.

ANIMAL REGISTRY



SPRAY SLIP



# Staff Training & Communication

Train all staff on:

- ☑ FMD clinical signs in wildlife
- ☑ Sanitation and disinfection rules
- ☑ Reporting procedures

Display FMD awareness posters at key points (entry gate, boma gate).

Announcements of FMD risks and required compliance measures to auction clients.

## **FMD** FOOT AND MOUTH DISEASE IN WILDLIFE

**BE ALERT!**



- ☑ Lameness
- ☑ Salivation
- ☑ Blisters on feet/mouth
- ☑ Dullness

- Report Any Suspicious Animals Immediately
- Notify the State Veterinarian
- Stop all animal movements

**Highly Contagious Disease!**

**REPORT IMMEDIATE! 123-456-789**

ENTRY





# External Support & Compliance

Work closely with:

- ✓ Local State Veterinary Services
- ✓ Animal Health officials
- ✓ Wildlife Disease specialists

This ensures regulatory compliance under South African law (Animal Diseases Act) and supports national FMD control efforts.

STATE VETERINARY  
SERVICES



AGRICULTURE  
Animal Health  
Officer



South Africa  
FIELD HANDBOOK

STATE  
VETERINARY  
SERVICES



# KEY PRINCIPLES REINFORCED:

- ✓ **MOVEMENT ONLY WITH VALID MOVEMENT PERMIT**
- ✓ **STRICT BIOSECURITY ZONES AND ACCESS CONTROL**
- ✓ **DISINFECTION OF VEHICLES AND EQUIPMENT**
- ✓ **IMMEDIATE REPORTING OF SUSPICIOUS SYMPTOMS**
- ✓ **DETAILED RECORD KEEPING**
- ✓ **STAFF TRAINING AND AWARENESS**

STATE VETERINARY  
SERVICES

 **PERMIT**

**APPROVED**

**SPRAY SLIP**

**MINIMUM EFFECT**

STATE  
VETERINARY  
SERVICES

DISINFECTION

**VIROCLAIR  
300**



# South African Wildlife Industry

## Market Insights 2025



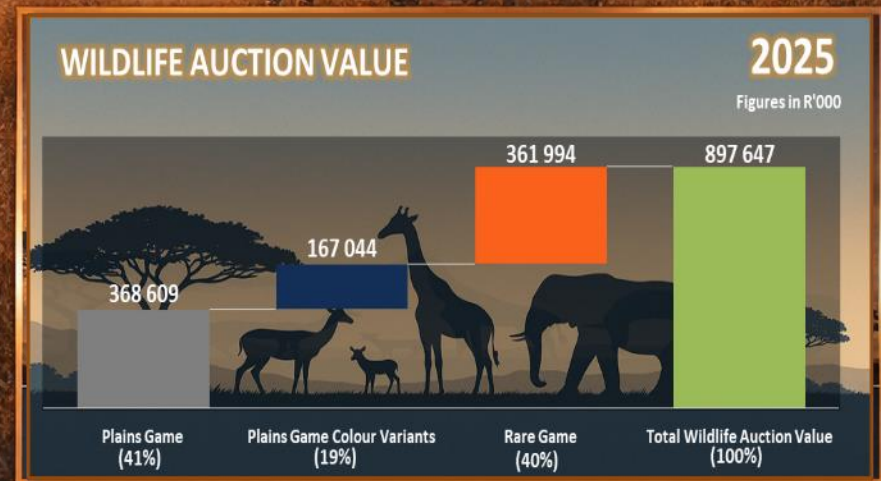
Live & Online Auction Trends | 2025 | 2026



# 2025 Market Snapshot – Big Picture

- 🐾 Total auction value: **R897.6 million** ↑39.8% YoY)
- 🐾 Total animals sold: **50,027** ↑0.3% YoY – effectively flat)
- 🐾 Average price per animal: **R17,943** ↑39.4%)

2025 defined by price expansion, not volume growth





# EXECUTIVE SUMMARY

## KEY MARKET MOVERS OF 2025

**COLOUR VARIANTS**  
OVERALL

**+ 39%**

*Average Price Change*

**RARE GAME**  
OVERALL

**+ 58%**

*Average Price Change*

**PLAINS GAME**  
OVERALL

**+ 33%**

*Average Price Change*

**TOTAL  
INDUSTRY**  
**+ 39%**

*Average Price Change*

**BEST PERFORMING**  
COLOUR VARIANT

**KINGS WILDEBEEST**  
**+ 111.8%**

*Average Price Change*

**BEST PERFORMING**  
RARE GAME

**BUFFALO BULLS**  
**+ 87%**

*Average Price Change*

**BEST PERFORMING**  
PLAINS GAME

**KUDU FEMALE**  
**+ 66.5%**

*Average Price Change*

**For the first time,  
total animals sold  
surpassed the  
50 000 mark.**



# Total Auction Revenue per year





# THE THREE FORCES SHAPING THE WILDLIFE MARKET (2016–2025)

## Industry Dominance



Power shifts from concentrated dominance to a more balanced, diversified market

## Market Trends

New buyer cohort

Price-led recovery

Tighter supply

2021–2025: pricing power returns, demand deepens, and buyer behaviour modernises

## Industry Structure



Plains game  
= stability



Rare game  
= upside



Data = driver

Mature, evidence-based market with distinct roles for plains, rare and exotic species

**Where dominance, demand and data converge – the wildlife market's new equilibrium.**



# Why 2025 Was a Structural Shift

- ✓ Post-COVID recovery phase completed by 2023
- ✓ 2024 acted as a consolidation and reset year
- ✓ 2025 marked a repricing of quality and genetics
- ✓ Scarcity of mature animals intensified bidding pressure



# Five-Year Compounding Performance (2020–2025)



Total auction value CAGR: **34.63%**



Quantity CAGR: **19.89%**



Simultaneous growth in price and volume is rare in primary industries



Biological growth amplifies financial returns

*The industry's ability to compound biological growth into sustained financial returns places wildlife assets in a category few primary sectors can replicate.*



# Market Composition – Three Pillars (2025)



Plains Game: 41% of total auction value (R368.6m)



Colour Variants: 19% of total auction value (R167.0m)



Rare Game: 40% of total auction value (R362.0m)



Balanced structure reduces volatility and systemic risk





# WILDLIFE MARKET CYCLE: 2008–2025

Six Defining Phases of the Modern South African Wildlife Economy



Compiled from AWA Wildlife Journal Data, Auction Analytics & National Market Trends



# Buyer Behaviour Shift Since COVID

- 🐾 New buyer cohort entered post-2021 without boom-cycle memory
- 🐾 Higher emphasis on data, genetics and documentation
- 🐾 Less speculative buying, more structured acquisition strategies
- ✓ Deeper bidder participation across auctions in 2025

**“The market has matured: fewer impulsive bids, deeper benches and smarter money.”**



## Rare Game 2025 – Scarcity-Driven Growth

Total rare-game value: **R361.99m** (↑**39.8%**)

Volumes declined **11.6%** year-on-year

Average price increased **58.2%**

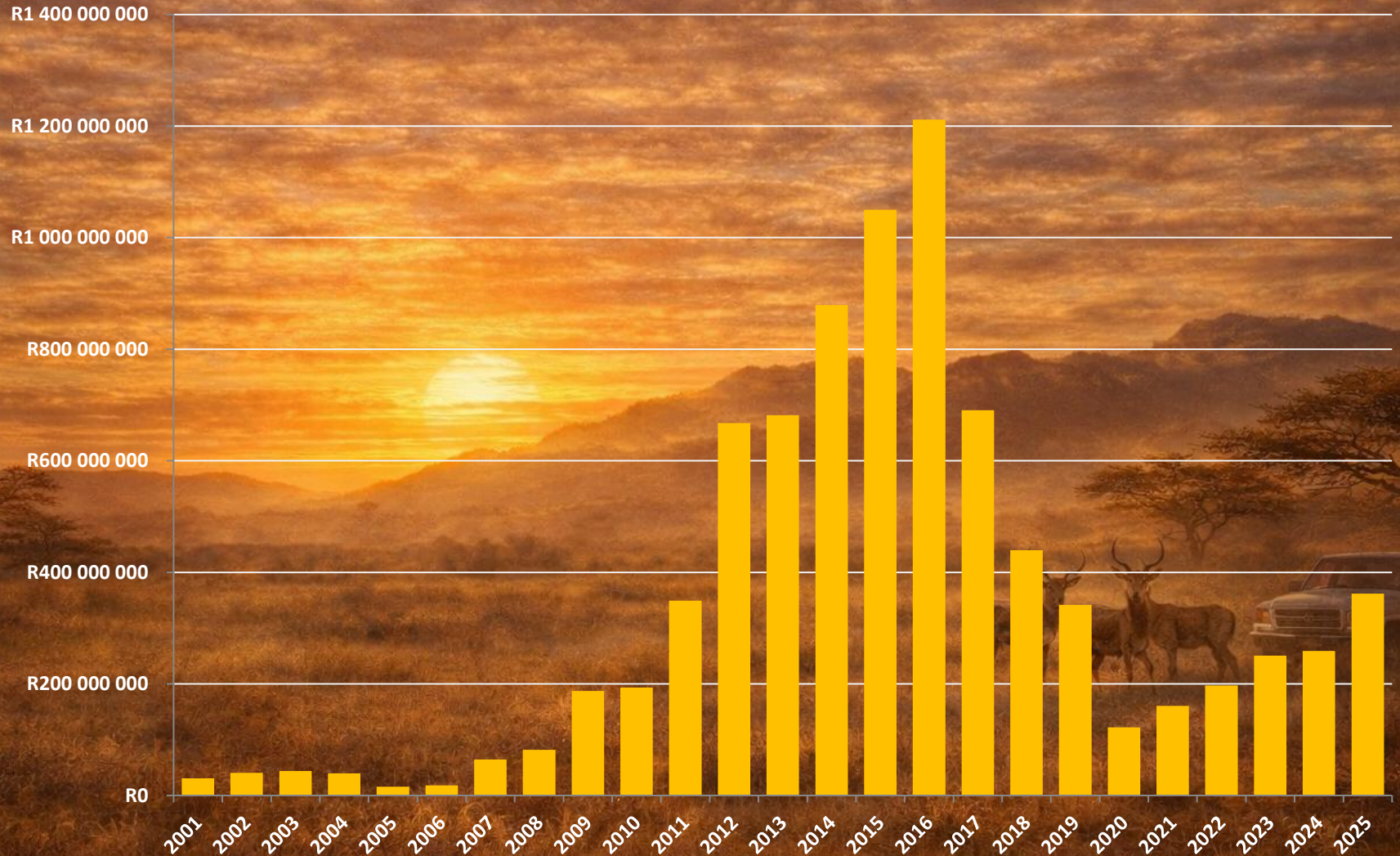
✓ Quality and **horn class** drove competition



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# Rare Game Auction Revenue per year





## RARE SPECIE DATA

Specie Name	% of total sales 2025	Price Change 2025	Quantity change 2025
Roan (Male and Female)	2,29%	7,75%	-0,32%
Roan Male	1,50%	-1,65%	-11,05%
Roan Female	0,79%	65,12%	14,07%
Tsessebe	0,32%	22,19%	-32,14%
Rhino	2,35%	75,22%	115,15%
Sables (Male and Female)	10,87%	46,98%	-10,78%
Sable Female	3,71%	80,37%	-12,90%
Sable Male	7,16%	32,94%	-9,13%
Buffalo (Male and Female)	23,69%	69,63%	-16,27%
Buffalo Female	9,33%	48,31%	-5,54%
Buffalo Male	14,36%	87,11%	-23,40%
RARE GAME AVERAGES	40,33%	58,16%	-11,62%




# Rare Game – Market Role

- 🐾 Functions as the volatility and upside engine of the industry
- 🐾 Pricing shaped by genetics, perception and confidence
- 🐾 Lower volumes but disproportionate value contribution
- ✓ Sets national pricing benchmarks during strong cycles





# Buffalo – Rare Game Value Anchor

A large buffalo with thick, dark fur and prominent, curved horns stands in a savanna landscape. The background is a warm, golden sunset sky with silhouettes of trees and grass. The buffalo is facing forward, slightly to the left.

Contributed **23.69%**  
of total rare-game value

Bull genetics drove strongest  
price escalation

Top-end animals continue to  
set price ceilings

Elite breeders re-entered  
the market in 2025



# Current Rare Game Buyer Preferences

- 🐾 Verified lineage and genetic credibility
- 🐾 Horn length and maturity classification
- 🐾 Comprehensive documentation and transparency
- ✓ Long-term herd viability over short-term gains





# Plains Game 2025 – Performance Snapshot



Total value: **R368.6m** (↑ **31%** approx.)



Volumes declined **1.5%** year-on-year



Average price increased **33.0%**

Indicates re-rating of quality plains game



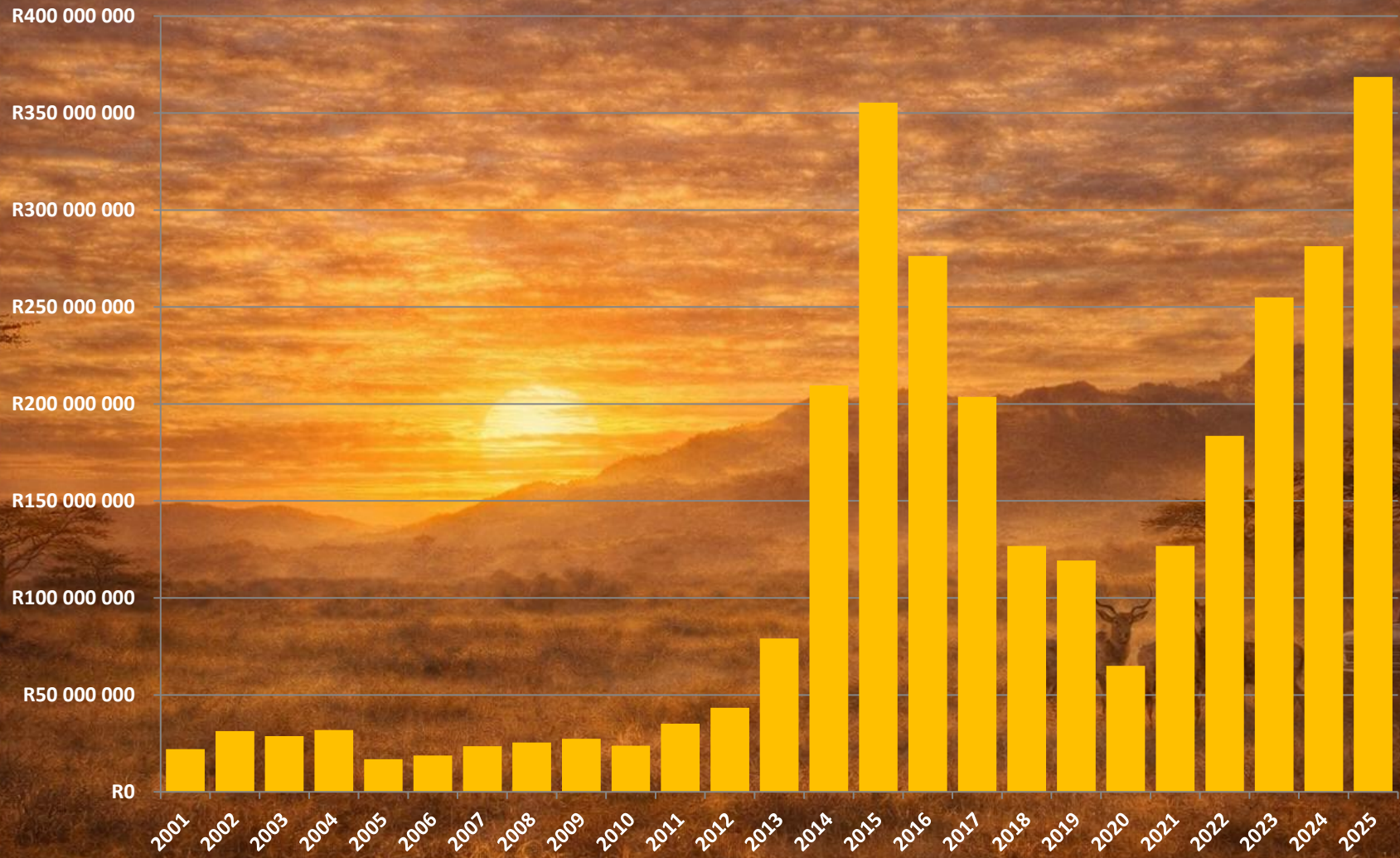
# Plains Game – Industry Backbone

- Provides **liquidity**, scale and stability
- Forms the base of auction volumes
- Supports hunting, breeding and tourism demand
- Key driver of consistent cash flow for farmers





# Plains Game Auction Revenue per year






## PLAINS GAME SPECIE DATA

Specie Name	% of total sales 2025	Price Change 2025	Quantity change 2025
Common Gemsbok	4.00%	20.08%	-8.05%
Total Common Impala (Male & Female)	3.75%	34.54%	-7.05%
Common Impala Female only	2.34%	35.10%	-9.86%
NYALA	2.77%	27.27%	+23.42%
Common Waterbuck	2.55%	36.50%	+12.65%
Giraffe	0.69%	10.46%	+14.23%
Total Kudu (Male and Female)	6.49%	53.15%	+3.13%
Kudu Male Only	4.05%	41.89%	+7.62%
Kudu Female Only	2.44%	66.50%	+0.61%
Zebra	2.16%	20.84%	+3.73%
Blesbok	4.27%	36.80%	-5.79%
Cape Eland (Male and Female)	3.52%	8.73%	+20.00%
Cape Eland (Female)	1.99%	13.08%	+38.98%
Redhartebeest	2.19%	31.04%	+8.84%
Common Blue wildebeest (Male and Female)	4.79%	30.84%	-15.73%
Blue Wildebeest (Female)	2.43%	31.45%	-18.93%
Springbok	4.29%	31.61%	+32.66%
PLAINS GAME AVERAGES	41.06%	33.01%	-1.51%






# Impala – Keystone Commercial Species

- 
- An Impala with long, spiraling horns stands in a savanna landscape at sunset. The background is a warm, golden-orange sky with silhouettes of trees and bushes.
- Largest volume contributor across auctions
  - Critical ecological stabiliser species
  - Strong adaptability across veld types
  - Remains entry point and anchor species for new farmers



# Emerging Scarcity in Plains Game

- 
- A Kudu antelope with long, spiraling horns stands in the foreground on the left. The background is a savanna landscape with acacia trees and a sunset sky in shades of orange and red. A wavy, semi-transparent white line separates the list from the bottom text.
- 🐾 Kudu supply declined materially in 2025
  - 🐾 Female animals increasingly priced at premiums
  - 🐾 Buyers prioritising veld performers and condition
  - 🐾 Selective selling strategies protecting price levels

Plains game is moving into a **scarcity-led, quality-driven market**. With fewer animals coming through, **buyers are paying for resilience and breeding value**, while disciplined sellers are **defending price integrity rather than chasing volumes**.



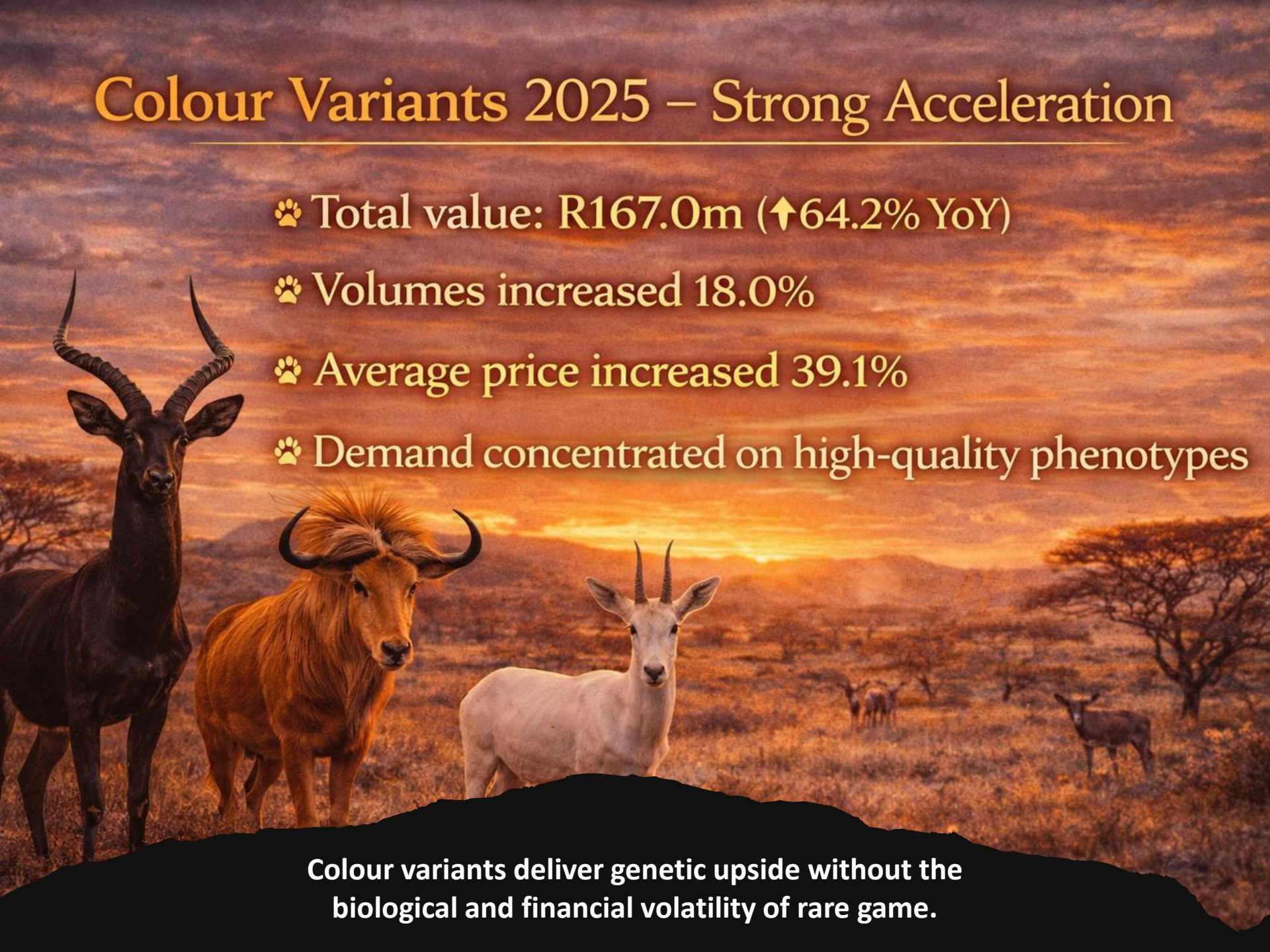
# Why Farmers Continue to Back Plains Game

- 🐾 Predictable breeding and reproductive cycles
- 🐾 Lower biological and security risk than rare game
- 🐾 Faster turnover and broader buyer base
- 🐾 Improved price resilience post-2023



# Colour Variants 2025 – Strong Acceleration

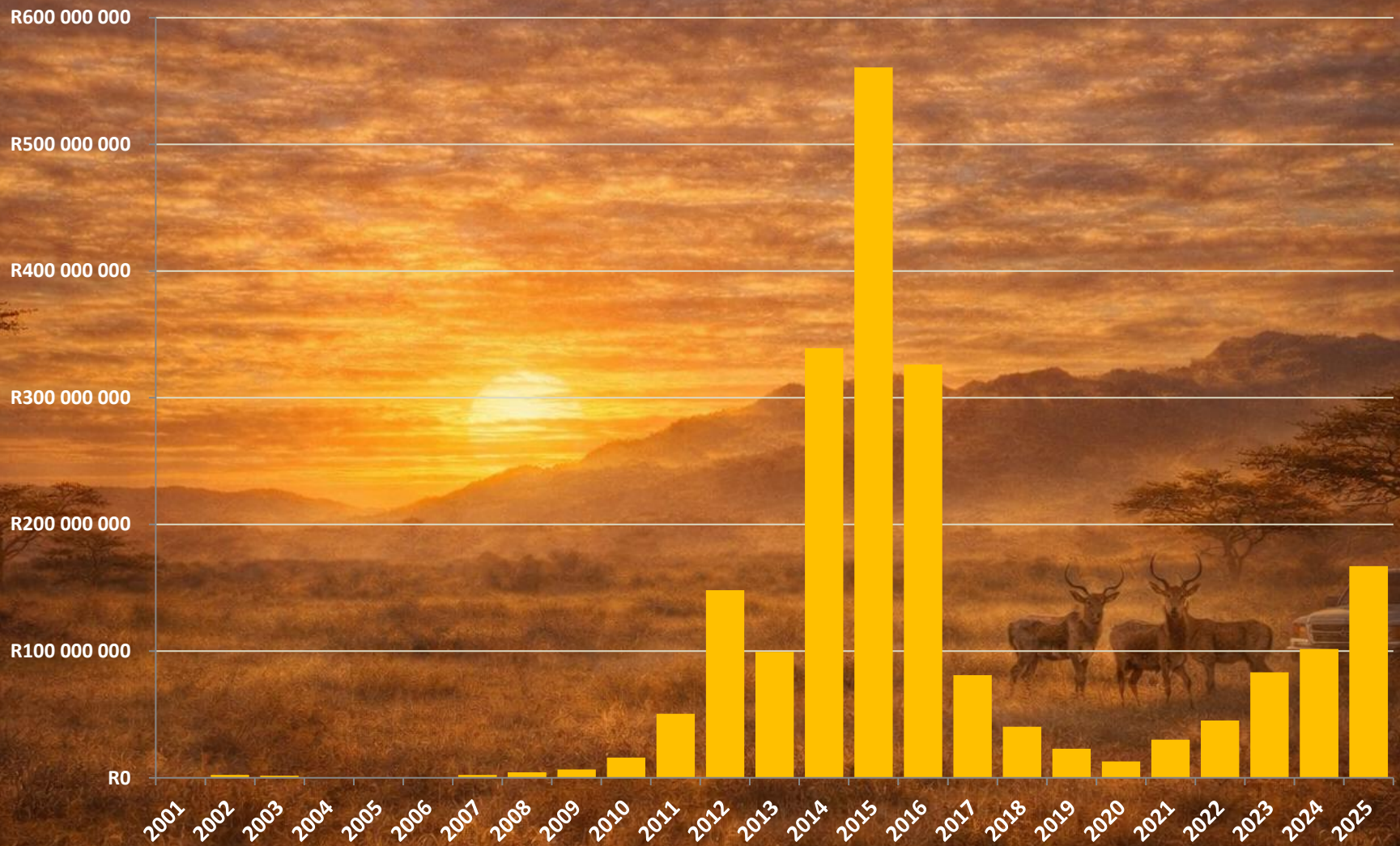
- 🐾 Total value: R167.0m (↑64.2% YoY)
- 🐾 Volumes increased 18.0%
- 🐾 Average price increased 39.1%
- 🐾 Demand concentrated on high-quality phenotypes



Colour variants deliver genetic upside without the biological and financial volatility of rare game.



# Plains Game Colour Variants Auction Revenue per year





## PLAINS GAME COLOUR VARIANTS

Specie Name	% of total sales 2025	Price Change 2025	Quantity change 2025
Livingston Eland (Male and Female)	1.08%	-14.64%	25.56%
Saddleback Impala	0.46%	-17.96%	105.79%
White and White Flank Impala	2.09%	31.14%	82.17%
Black Impala	2.28%	41.58%	-2.16%
Dappled Impala	0.92%	6.43%	108.16%
Gemsbok/Oryx Golden	0.83%	32.49%	-10.13%
Gemsbok/Oryx Red	0.75%	26.34%	33.33%
Golden Wildebeest	3.13%	26.71%	-9.18%
Kings Wildebeest	2.92%	111.80%	0.00%
Royal and Ghost Wildebeest	1.20%	25.33%	-4.17%
PLAINS GAME COLOUR VARIANTS AVERAGE	18.61%	39.11%	18.04%



# Top Performing Colour Variants

- 🐾 Golden, King and Royal Wildebeest
- 🐾 Black and Saddleback Springbok
- 🐾 High-contrast Impala variants
- 🐾 Tourism-aligned phenotypes outperforming





# Drivers of Colour Variant Premiums

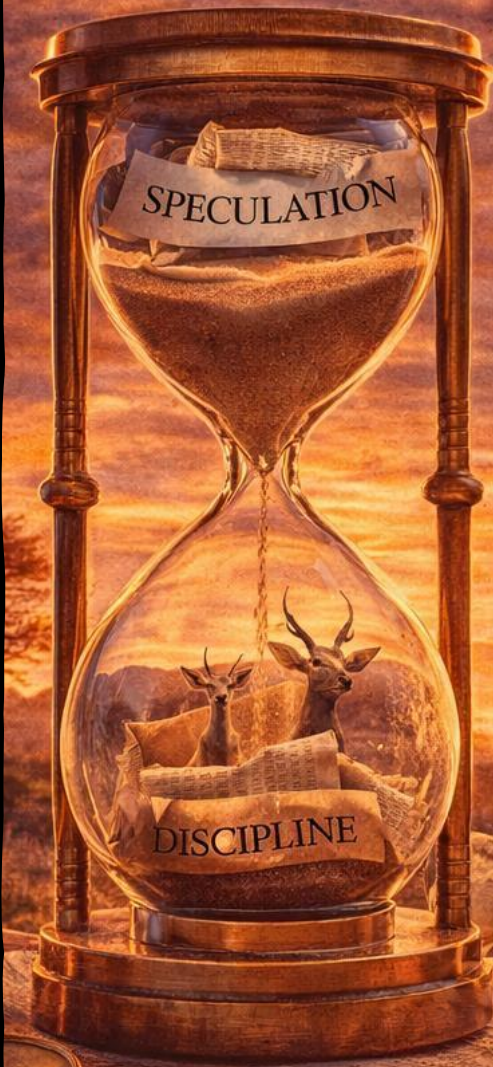
- 🐾 Visual differentiation for tourism operations
- 🐾 Enhanced hunting experience
- 🐾 Farm branding and marketing value
- 🐾 Controlled supply and line purity





# Maturing Colour Variant Market

- 🐾 Shift away from speculative overproduction
- 🐾 Greater focus on genetic consistency
- 🐾 Buyers rewarding discipline and quality
- 🐾 Smoother cycles than rare game historically





# 2025 Market Summary



Price-led growth  
across all market  
segments



Scarcity of mature  
animals driving competition



Balanced contribution  
from all three pillars



Strong foundation  
heading into 2026



2025 marked a **clear transition to quality-driven value creation**, with disciplined buyers competing for proven genetics and mature animals.



# Why the Wildlife Economy Outperforms



Biological growth  
and compounding



Scarcity-driven pricing  
dynamics



International tourism  
and hunting demand



Genetics as a long-term  
value driver



# 2026 Outlook – – Farmer Perspective



Supply expected to remain tight



Quality animals likely to  
command premiums



Disciplined breeding  
programmes rewarded



Market momentum supported  
by strong fundamentals





# VENISON INDUSTRY TRENDS

## 2024–2025: One-Sided Economics

- ✓ Auction prices accelerated sharply
- ✓ Venison yields declined as:
  - ✓ Mature animals became scarce
  - ✓ Hunting packages capped animal numbers
  - ✓ Harvesting shifted toward younger animals, eroding carcass mass and value

Strategic reality:

Selling live became rational.  
Harvesting became punitive.



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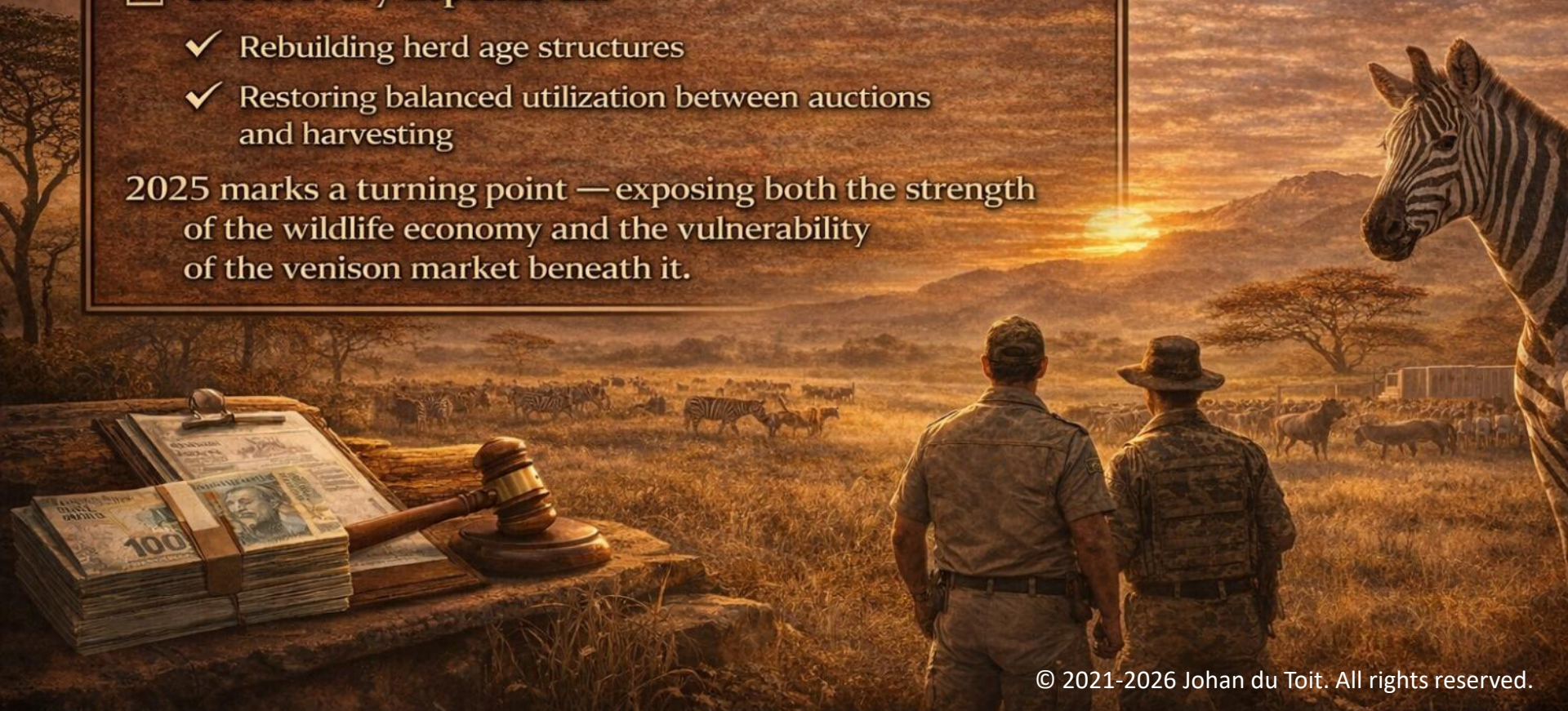
# VENISON INDUSTRY TRENDS

## What This Means Going Forward



- ✓ Venison is transitioning into a supply-constrained, price-sensitive sector
- ✓ Its recovery depends on:
  - ✓ Rebuilding herd age structures
  - ✓ Restoring balanced utilization between auctions and harvesting

2025 marks a turning point — exposing both the strength of the wildlife economy and the vulnerability of the venison market beneath it.





# African Wildlife Auctions

Market Intelligence | 2025-2026

Supporting informed breeding, buying and selling decisions



# The End

Information extracted from Awa Wildlife industry Journal: 2025