



in association with

**AWA**  
AFRICAN WILDLIFE AUCTIONS

**WSI**  
WATERBERG SECURITY INITIATIVE

**WILDSWINKEL**  
mokkies en direk

# FMD Information Day

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

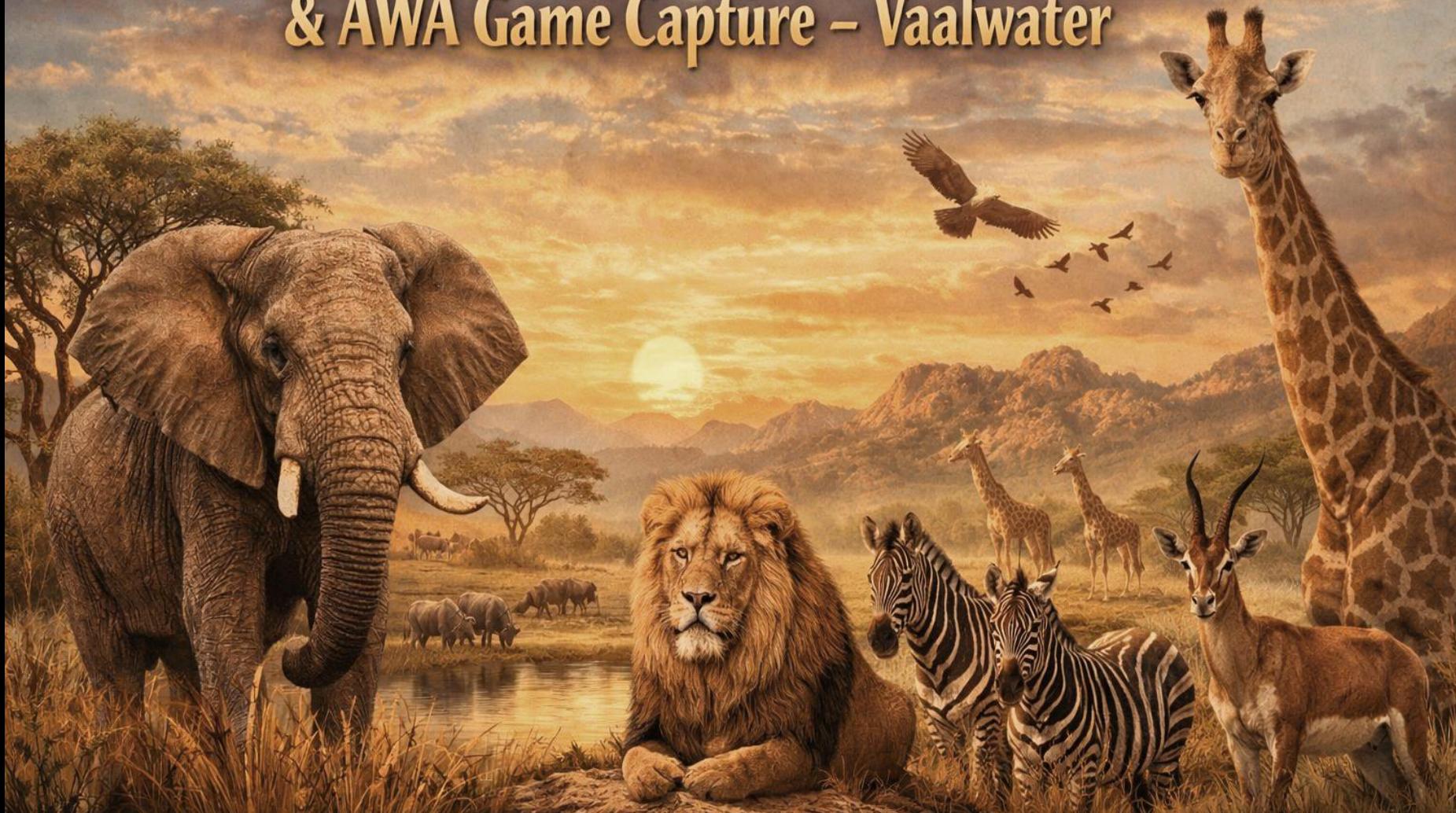
A scenic African landscape at sunset with a herd of buffaloes in the foreground.

**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.

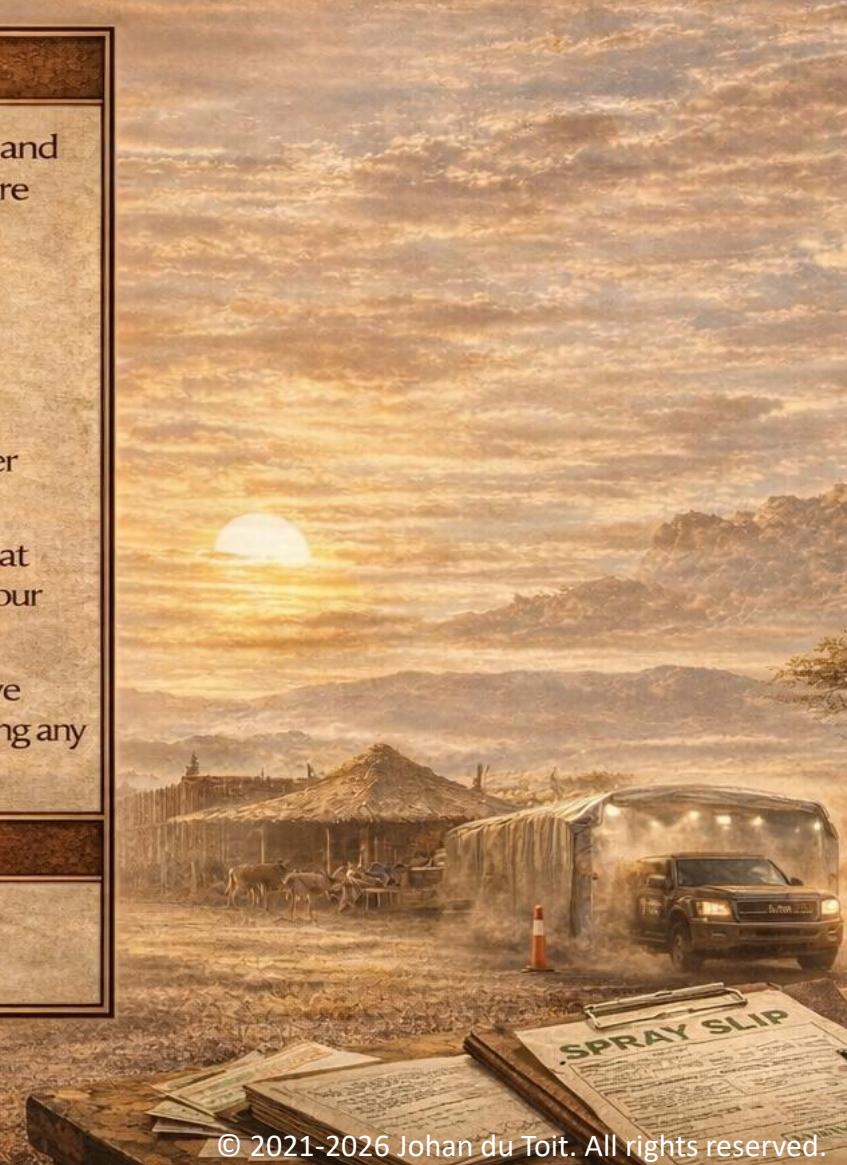
# Disinfection & Sanitation Protocols

## 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.



# 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



DISINFECTION B-ONE



# 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.



# 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**



# South African Wildlife Industry

## Market Insights 2025

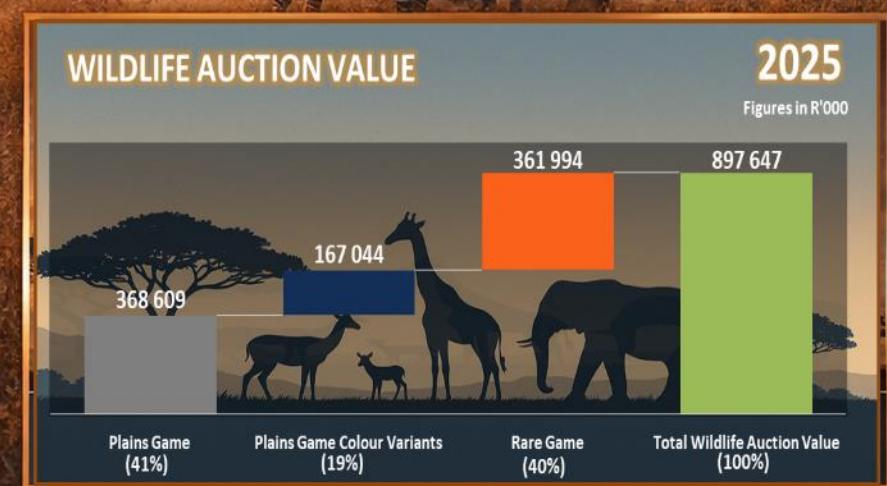
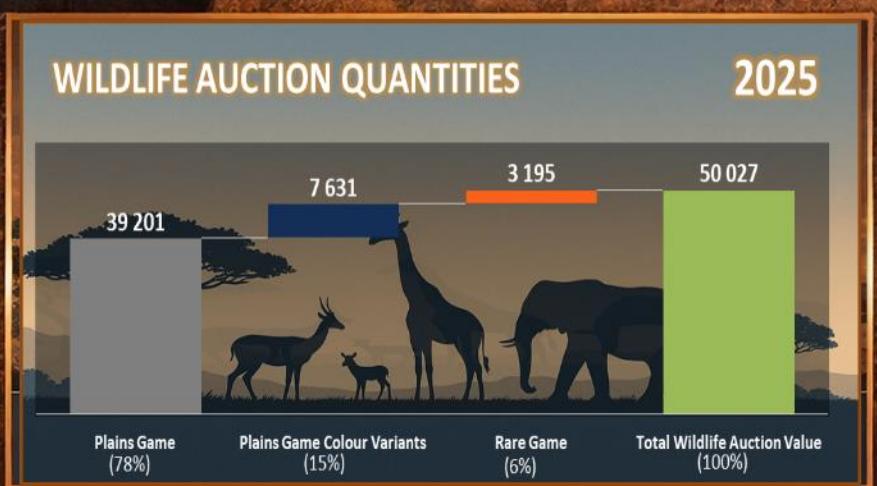


Live & Online Auction Trends | 2025 | 2026

# 2025 Market Snapshot – Big Picture

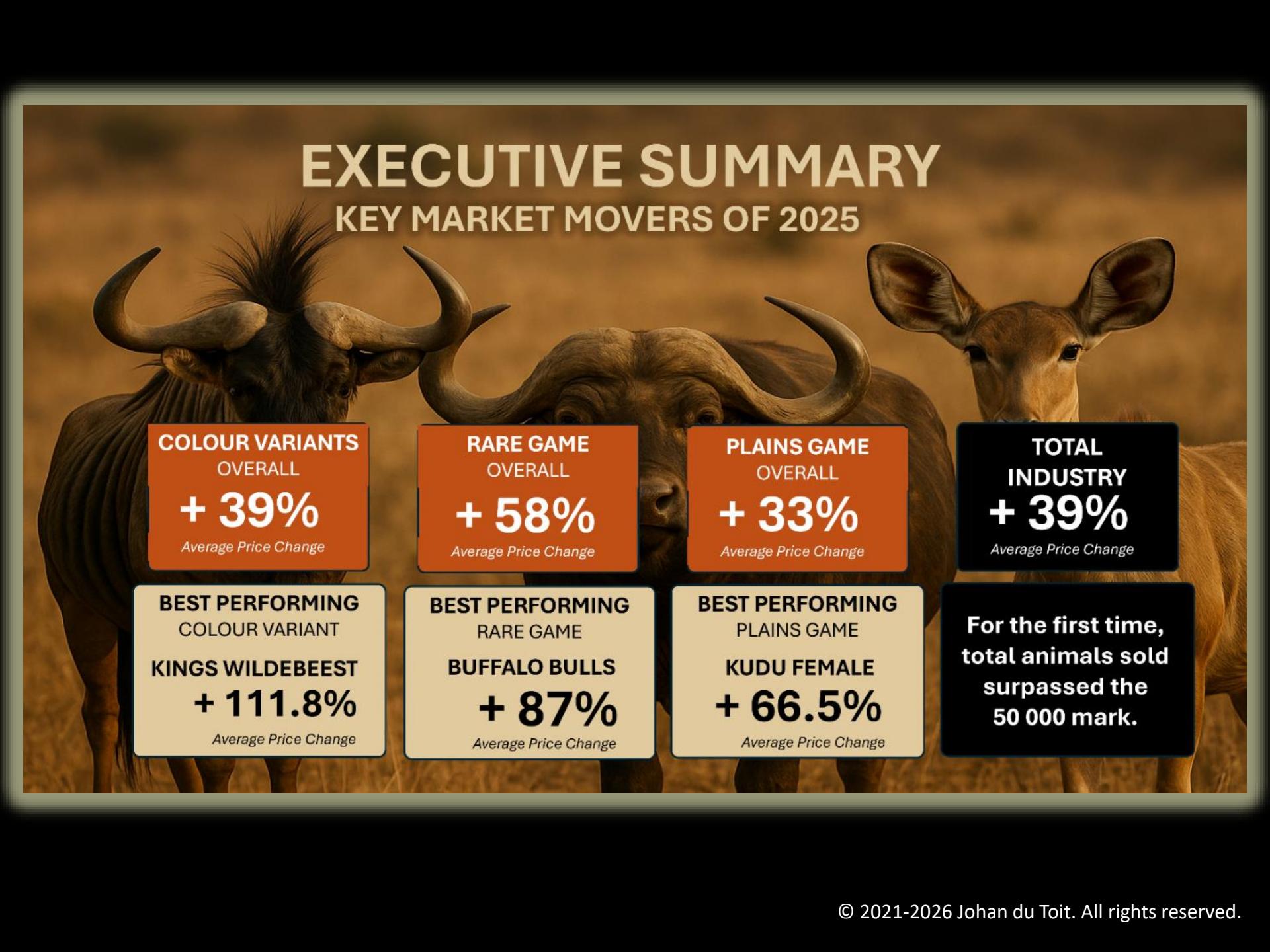
- 🐾 Total auction value: **R897.6 million** ↑39.8% YoY)
- 🐾 Total animals sold: **50,027** ↑ 0.3% YoY – effectively flat)
- 🐾 Average price per animal: **R17,943** ↑39.4%)

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

**PHASE 1**  
**FORMATION & EARLY GROWTH**

2008-2012



**THE OVERHEATED MARKET ERA**

Record headline prices during peak boom and speculative conditions.

**PHASE 2**  
**MARKET OVEREXTENSION & CORRECTION**

2013-2016

Normalization & stability

**PHASE 3**  
**COVID-ERA CONTRACTION**

2020-2021

Multi-year price lows

**PHASE 4**  
**POST-COVID REBUILD & EARLY RECOVERY**

Quantity upliftment by 9%



**PHASE 5**  
**MODERN MARKET RESURGENCE**

2025: Broad-based price resurgence across plains game, colour variants and selected rare species.

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

Species 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



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%**

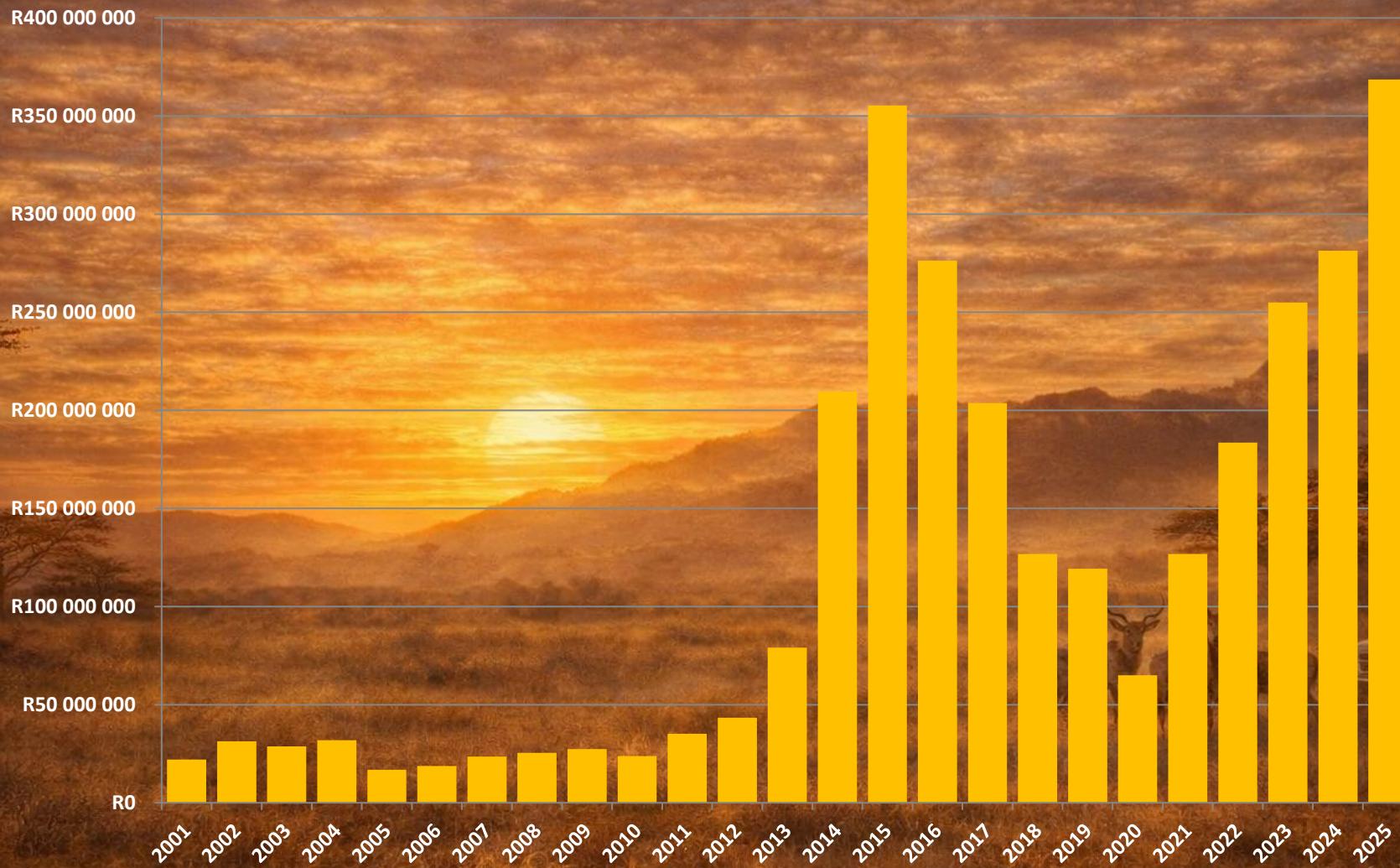
Indicates re-rating of quality plains game

# 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

Species 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 Bluewildebeest (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

- 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

- ✿ 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

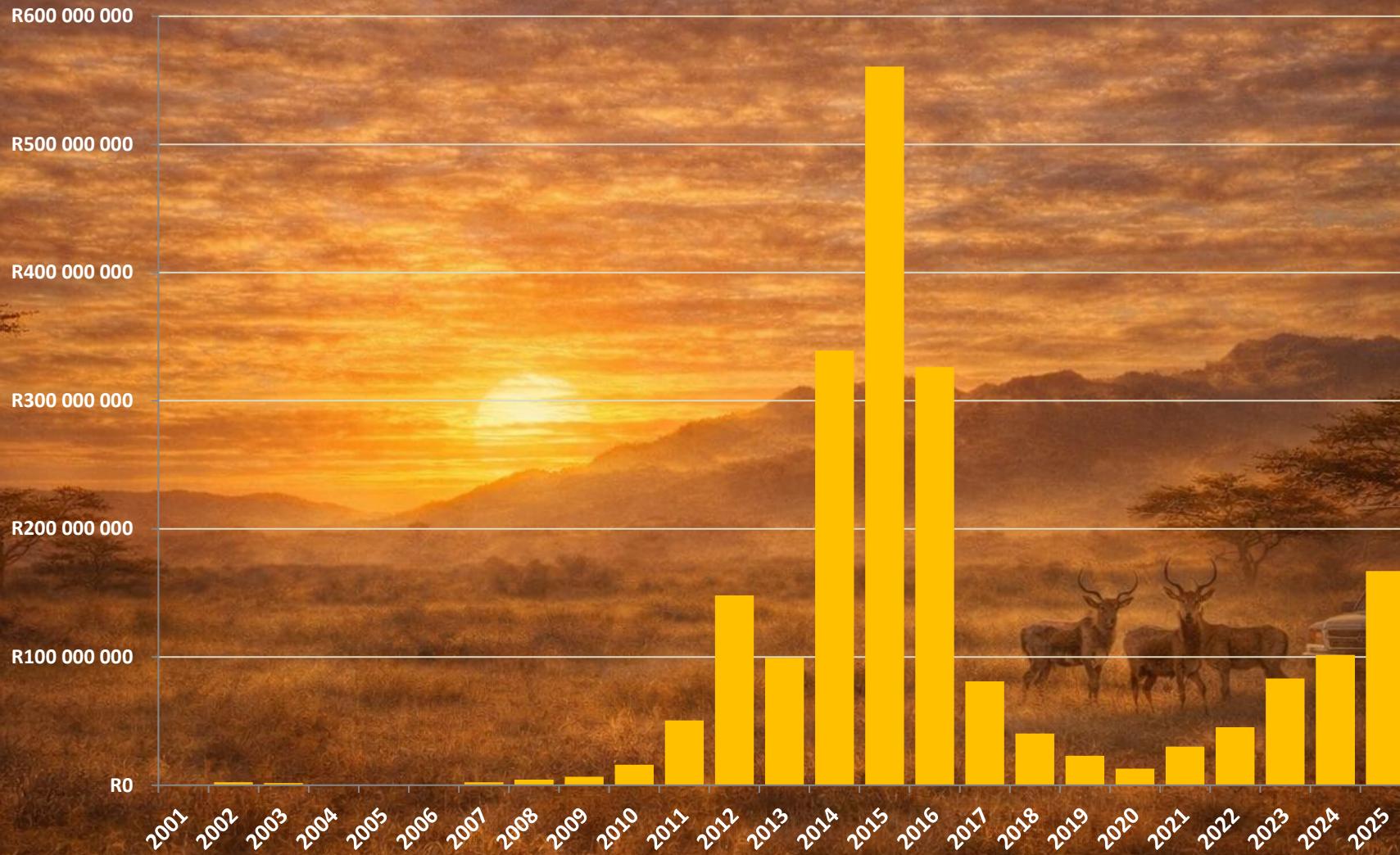


# Colour Variants 2025 – Strong Acceleration

- ✿ 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	<b>18.61%</b>	<b>39.11%</b>	<b>18.04%</b>

# 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.



# 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



Information extracted from Awa Wildlife industry Journal: 2025