

# Botswana: Trends in growth of modern retail and wholesale chains and related agribusiness

## Context

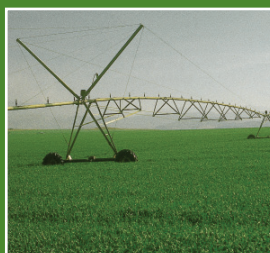
This policy brief forms part of the Recovering Markets study in Southern Africa. It has endeavored to analyse market concentration in the food processing and retail sectors, as well as to predict future dynamics in the sectors which have emerged as a result of the restructuring of the food market and the rapid changes taking place in the structure and governance of local, national and regional agri-food markets and the implications of the changes for small/medium producers in the restructuring of the food industry, together with the implications for policies and programmes within the context of the agri-food market.

## Key points

- Agri-food systems in Botswana are changing due to increased FDI by South Africa firms. There has been an increase in the number of local and foreign supermarkets involved in the food retail sector in Botswana.
- Supermarkets use a mixture of procurement systems. These range from decentralised to the use of specialised fresh fruit and vegetables (FFV) wholesalers and distribution centres procuring produce for their stores in Botswana. Decentralised (store to store) procurement enables supermarkets to procure from local farmers including small scale farmers. Small scale traditional farmers who produce under rainfed conditions are excluded from the supermarkets' FFV supply chain. The number of small scale commercial farmers who are entering the FFV supply chain in Botswana is increasing. This could be attributed to government intervention and private sector involvement.
- In the beef sector, alternative market channels have gained importance offering stiff competition to the Botswana Meat Commission (BMC), which is the major player in both the domestic and export market in Botswana. In order to access the lucrative EU beef market, BMC has to adhere to stringent food quality and safety standards. These measures aimed at controlling livestock disease, increased transaction costs for producers which greatly reduce the price they receive.
- Public policy, namely trade policies, play a crucial role in the development of FFV, dairy and food processing sectors in Botswana. Market and trade liberalisation,



UNIVERSITEIT VAN PRETORIA  
UNIVERSITY OF PRETORIA  
YUNIBESITHI YA PRETORIA



regional integration and domestic policies intended to attract FDI have opened up trade between Southern African countries. There is evidence of increased trade flows between member countries such as Botswana and South Africa. The increased expansion of supermarkets in Botswana may have helped to attract imports especially of those goods not produced locally.

### Brief country profile

Botswana is a landlocked country in the centre of Southern Africa. It is bordered by Namibia to the west, Zambia and Zimbabwe to the north east and South Africa to the south. The country covers an area of approximately 582,000 sq. km. The climate of Botswana is arid to semi-arid. Rainfall is erratic, ranging from 250 mm per year in the south west to over 600mm in the north east. The total population is about 1.68million (Republic of Botswana, 2003) with an urbanisation rate of 50%, a gross domestic product (GDP) of US\$ 8.5 billion (2004) and a per capita GDP of US\$ 2796 (2002). Botswana is a member of the Southern African Development Community (SADC) and Southern African Customs Union (SACU). Botswana's creditworthiness was ranked as "high" in 2001. Botswana has, to date, continued to receive these high ratings, reflecting an unusually low public debt and very strong liquidity, which derive from commitment to prudent fiscal and monetary policy. However, increased spending on HIV/AIDS control and treatment coupled with the slow pace of economic diversification from reliance on the mining sector might in future undermine this ranking (SADC, 2006).

The agricultural sector's contribution to GDP has declined from 40% in 1966 to 4% in 2006. This has, in the main, been due to the rapid development of the mining sector and slow growth of the agricultural sector (Republic of Botswana, 1997). Despite its low contribution to GDP, agriculture still remains an important sector in providing food and employment to rural populations (who make up 50% of the population). Agriculture is seen as a sector that may play a significant role in the diversification of the economy. The government of Botswana is committed to the diversification

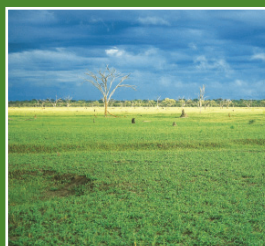
of the economy away from reliance on mining (Republic of Botswana, 2004b).

The agri-food system in Botswana is based on local production and food imports due to the nature of the environment which is arid to semi-arid and the underdevelopment of irrigation agriculture (Republic of Botswana, 2000). The agri-food system consists of producers, food processors, importers, wholesalers and retailers. Food retail consists of the modern (formal) and the traditional (informal) food sectors. The formal food retail sector consists of wholesalers, supermarkets (chain and independent), and convenience stores (located in filling stations) and general dealer shops. The informal (traditional) sector consists of street vendors.

The food retail sector is changing due to factors internal and external to Botswana. South African retail firms increased FDI fuelled by market and trade liberalisation and regional integration is a major determinant factor. There has been an increase in the number of supermarkets investing in Botswana in the last 10 years (Emongor, 2007). The rapid growth and expansion of supermarkets in Botswana could be attributed to both demand and supply side factors. Demand factors include increased urbanisation (about 50% of Botswana's population resided in urban areas in 2003 compared to 18 % in 1981), growth in income and increased economic middle class, and changing consumer tastes and preferences. Supply side factors include trade and market liberalisation, favourable domestic policies (relaxation of exchange controls), political stability and regional integration.

Currently there are both foreign and local chain supermarkets, independent supermarkets, cash and carry stores and convenience stores involved in food retail in Botswana (Table 1).

The share of supermarkets in food retail in Botswana could be between 50% and 60% (Weatherspoon & Reardon, 2003) but key informants estimate it to be as high as 80% (Emongor, 2007). This is plausible because 50% of Botswana's 1.68 million people reside in urban areas (towns and urban villages) where supermarkets are dominant. Since the early 1990s supermarkets (foreign



**Table 1: Supermarkets in Botswana**

Supermarket Name	Number of stores	Urban (Gaborone)	Other urban and/ rural towns	Origin
Shoprite*	3	1	2	South Africa
Payless	4	4	0	Botswana
Spar	26	8	18	Franchise/ supervised by Spar South Africa
Metro Cash & Carry (wholesale) METSEF	12 3	1 2	430 (Viva stores & other general dealers- franchises)	Metro South Africa (original company from Germany)
Checkers	2	1	1 (Francistown)	South Africa
OK foods	3	3	-	
Choppies	27			Botswana
Woolworth foods	3	3	0	South Africa
Fairways	7	1	6	Botswana
Pick 'n Pay family stores	2	2	0	Franchise
Score supermarkets	16	4	12	Pick 'n Pay owns over 50% shares
Independent supermarkets, Cash and Carry	many	many	many	Botswana

Source: Emongor and Kirsten (2007)

and local) have been expanding rapidly by buying out local independent and chain supermarkets, forming partnerships and franchising (Table 1).

The expanding Botswana supermarket sector has been able to increase market share as consumers prefer the convenience of one stop shopping supermarkets offer and the perceived lower prices for its "high quality" food products. The entrance of many of these chain supermarkets has led to the closure of some of the smaller retail stores (general dealer shops). The benefits of these increased FDI investments in supermarkets in countries such as Botswana include the increased competition among retailers and lower prices of some food products.

### Implications of procurement practice changes to markets

The demand for FFV in Botswana is met through local production (20%) and imports (80%). Botswana is a net importer of FFV. The FFV sector is in its infancy. Some of the marketed fresh fruits and vegetables are imported because the country's agronomic conditions (arid to semi-arid climate)

do not favour their production. For others, it is cheaper to import because some commodities cannot be easily obtained locally in the required quantities and qualities. The supply chain of FFV consists of producers (large and small scale), wholesalers (specialised and dedicated FFV wholesalers who supply chain supermarkets and institutional buyers), supermarkets, general dealers mainly in rural areas who stock very few FFV products and street vendors.

Both large and small scale farmers are involved in the production of FFV in Botswana. Large scale farmers located in the Tulliblock, which is about 300km from Gaborone, supply to wholesalers and directly to supermarkets. There are two types of small scale farmers involved in FFV production. Small scale farmers in the traditional system, who own approximately 5ha or less, use low inputs and depend on rainfall to produce mainly field crops and FFV for subsistence. These farmers are not included in the formal FFV supply chain. Even in good rainfall years, traditional small scale farmers are unable to produce enough staple food crops to provide sufficient food and income for their families. The second type is the emerging commercialised,



well capitalised small scale farmers who are supplying to supermarkets and other market channels. Survey results show that there are increasing numbers of this type of small scale farmers getting involved in the FFV supply chain since the early 1990s (Emongor, 2007). The increased involvement of farmers in the production of FFV in Botswana can be attributed to direct government intervention and probably the involvement of supermarkets in buying FFV from contracted farmers. Accessibility to the supermarkets FFV supply chain offers a ready market for farmers' produce. Due to these efforts, production of fresh fruits and vegetables has been increasing (Emongor & Kirsten, 2007).

Local and foreign supermarkets use a combination of procurement systems to purchase FFV in Botswana. These systems include: farmers delivering produce to individual stores, supermarkets that use specialised wholesaler or preferred suppliers, supermarkets that use distribution centres and outsourcing (Emongor, 2007). Local chain supermarkets such as Payless, Friendly and Choppies and various independent retailers operating under the Spar logo contract with farmers (large and small scale) to deliver FFV directly to their stores. Some chain supermarkets procure FFV through specialised wholesalers or preferred suppliers such as Mr. Veg. Mr. Veg supplies FFV to various supermarkets such as Ms Veg (Franchise of Mr. Veg), METSEF and Pick 'n Pay. About 90% of the fresh produce sold by Mr. Veg is sourced from the Johannesburg Fresh Produce Market. The remaining 10% is sourced from large scale farmers in the Tulliblock which is about 300 km from Gaborone. Some supermarkets procure FFV centrally at distribution centres. This is observed among large South African supermarkets such as Spar, Shoprite and Pick 'n Pay. These chain supermarkets use their sophisticated distribution centres and specialised FFV sourcing companies in South Africa to source FFV for their stores in Botswana. Street vendors source FFV at farm gate (from small scale farms near the cities), from wholesalers (such as Tony's Café) and from chain supermarkets. This is because prices in chain supermarkets are normally lower than those of street vendors.

Meat (beef, sheep, goat and poultry) are important in the socio-economic activities of Botswana. **Cattle** are the most

important livestock and are produced in two distinct sectors; traditional (operate on communal land) and commercial (freehold land). About 80% of all cattle reared in Botswana are kept under the traditional production systems and the remaining are kept on commercial farms (Nkhori, 2004). Approximately 44% of producers in the traditional systems own small herds of between 10 and 40 head of cattle (Republic of Botswana, 2004a). Beef cattle are marketed through two major channels namely Botswana Meat Commission (BMC), which was formed in 1966 by an Act of Parliament, and is responsible for slaughter and marketing beef for both the domestic and export markets. BMC is the sole exporter of lean beef and has two state-of-the-art meat processing plants located in Francistown and Lobatse. These plants are equipped to slaughter and debone 800 cattle and 500 small stock per day. In the domestic market, beef cattle are marketed directly to BMC or its agents. The alternative channels are inter alia, private butchers, speculators, private buyers, co-operatives, municipal abattoirs, local abattoirs, sales to other farmers and auctions. In order to reduce transaction costs, small scale farmers form informal weakly bound groups in order to attain the critical cattle numbers BMC requires. The groups then use cattle agencies to link to BMC. The agencies offer their services for a commission of 2.5% (Nkhori, 2004).

In recent years cattle sales through alternative channels have increased, offering stiff competition to BMC leading to its stagnation or declining share in processing and marketing of beef cattle. For example in 2002, approximately 60% of cattle sold by the commercial sector were sold to BMC and its agents and in 2003 this percentage dropped to 53%. The alternative channels that have gained in sales are butchers, feedlots and other farmers (agencies). Due to stringent quality and grading requirements of BMC, many cattle producers perceived that selling to BMC was a "rip-off" as BMC allegedly pays low prices for high quality carcasses. In most instances the quality of carcasses produced doesn't usually match the required standards and the prices offered to the livestock producers are subsequently unattractive. The result is that livestock producers prefer to sell to the alternative channels which have less stringent quality standards and can offer better prices for their cattle (Table 2), (Nkhori, 2004).



Apart from low prices, other factors that cause farmers to prefer the alternative market channels are high transaction costs. These include high transportation costs to BMC processing plants incurred by the producers and the delayed payments (7-14 days after slaughter) whereas competing channels pay cash on delivery. Another factor is that these channels are easily accessible to producers as they are located in the village or another village nearby (Nkhori, 2004).

The BMC is a statutory body fully owned by the government and has full authority from the government to deal with all issues regarding exportation of beef and its bi-products. Indeed, the BMC exhibits monopolistic behaviour in the industry especially with regards to pricing and it remits some revenue to the government from the levies charged on every transaction. The state also plays a key role in disease control by imposing livestock travel bans in instances of disease outbreaks. The state mainly focuses on pursuing policies that would lower transaction costs in output and input markets in order to improve the welfare of the producers (Nkhori, 2004).

The increased competition and recent disease outbreaks (such as FMD) in cattle producing areas aggravated BMC's supply constraints resulting in its abattoirs operating at surplus capacity. When BMC processing plants operate at surplus capacity, it threatens its ability to retain export markets due to the inability to supply the required quantities. Botswana has an export quota of 18 916 to the EU market. BMC sells mainly boneless beef (chilled and frozen) to the European Union and countries in SADC. The major buyers are countries such as United Kingdom (UK) with a market share of 28.9%, Germany (10%), Holland (0.7%), Reunion Island (3.4%), Republic of South Africa (9.2%) and Mauritius (0.14%).

The stringent disease control measures enforced to meet the specification of the EU markets when there was an outbreak of FMD in Botswana in 2005 cost its government millions of pula in disease control and compensation to farmers who lost their cattle.

In the local retail market, beef is sold through supermarkets, butcheries and informal retail outlets. Chain supermarkets

such as METSEF, Pick 'n Pay and Shoprite source their supply from large butcheries, and in some cases outsource their beef category to butcheries. Butcheries offer lower retail prices than supermarkets. Generally BMC acts as a wholesale price leader, which means that butcheries and other establishments that sell beef, peg their prices to those of BMC. Beef prices in regional markets, exchange rates, carcass grade, and carcass weight and disease conditions influence BMC's beef prices.

**Table 2: Cattle (1-3 years old) average prices by type of buyer**

Type of buyer	Average producer price (Pula)
BMC	1041
BMC Agent	1010
Cooperative	893
Another farmer (agencies)	1260
Auction	903
Municipal abattoir	1721
Local abattoir	1052
Trader	1003
Other (feedlots, butchers, private buyers)	1309

\*Average exchange rate 2004: 1US\$ = 4.69Pula

Source: Republic of Botswana, 2004a

In Botswana villages, **poultry** keeping is a sideline occupation because of the dominance of the beef cattle industry in the society (Aganga *et al.*, 2000). The total chicken population in Botswana is about 15 million. Chickens are kept under two systems, namely commercial (exotic breeds for eggs and meat), which may account for 80%, and traditional extensive production systems which account for 20% of chicken stocks. Botswana is 98% self-sufficient in poultry meat and eggs (Nsoso. *et al.*, 2005). Traditional poultry production serves as a source of protein to many rural households on and off the farm. The poultry meat sector is protected via import bans. The key players in this sector include processors such as Molep's poultry, Tswana pride and Richmark's poultry. These are large producers who produce and process chicken products and supply directly to supermarkets. Small scale poultry farmers



sell processed whole chickens directly to consumers and to independent supermarkets. Production capacities are low owing to the fact that the country depends on the importation of broiler stock and chicken feed from neighbouring South Africa and Zimbabwe.

Food manufacturing/processing consists of a number of sectors such as food and beverages, meat processing, dairy processing and grain milling. The **food processing** sector is underdeveloped. Most of the processed foods sold in supermarkets in Botswana were sourced and procured from South Africa. Key informants estimated that about 80% of all processed foods sold in supermarkets in Botswana are imported from South Africa (Emongor, 2007). This is mainly attributed to the lack of these products in the local market due to low processing capacity. Chain supermarkets such as Shoprite, Pick 'n Pay and Spar use their distribution centres in South Africa to source these products for their stores in Botswana. Local chain supermarkets use local importers and agents based in South Africa.

The dairy industry is in its formative years in Botswana (Republic of Botswana, 2004c). The impact of supermarkets on the livelihood of small scale dairy producers is still small because most of the fresh milk processed in the country is sourced from South Africa and large scale farmers in Botswana. The reason for this sourcing pattern is the underdevelopment of the dairy sector in general.

There are three major dairy companies; namely Sally Dairy, Clover Botswana and Parmalat. According to the production managers of Sally Dairy and Clover Botswana, 97% of the fresh milk processed by Sally Dairy and 75% of the fresh milk processed by Clover Botswana was imported from South Africa. Parmalat in Botswana does not process fresh milk but acts as a distributor of processed products such as UHT milk, cheese and yoghurt from Parmalat South Africa in the Botswana market. The dairy processors market 35% of their output through supermarkets and the remaining 65% through wholesalers and other channels (Emongor, 2007).

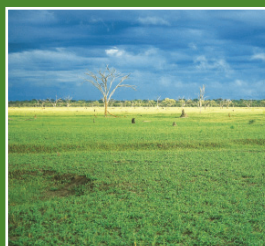
Grain milled products such as wheat flour and maize flour are sourced locally from large milling companies such as

Bolux Milling Company, Shashe Milling Company and Bokomo which started milling operations in Botswana in 2004. Foreign sources are large South African grain milling companies such as Premier Foods Ltd and Tiger Brands. South African chain supermarkets procure flour products under their own supermarket brands, e.g. Family Favourite "METSEF" brand, Spar maize meal brand, and company brands such as "Iwisa", "Induna" and "Impala". Maize flour products from South Africa were significantly cheaper than those procured in Botswana in the supermarkets when they were stocked (Emongor, 2007). This could be due to scale economies large South African and other multinational milling companies enjoy.

### Regional and international markets and linkages with national channels

Both regional and international beef markets have influenced the beef sector. Botswana as a member of the ACP states is a signatory to the Cotonou Agreement, which guarantees non-reciprocal access of livestock products to the EU market. In order to maintain its quota in this market farmers and BMC have to adhere to stringent quality and safety standards. For example meat products have to be disease free and adhere to a host of other safety requirements, traceability being an example.

Botswana, being a member of SACU and SADC has witnessed an increasing flow of products to and from member countries. There has been increasing trade flows between South Africa to Botswana and vice versa. Imports from South Africa to Botswana have grown by 30% since 2000 to 2003. Generally, imports from South Africa to Botswana have increased more rapidly than exports, resulting in a negative trade balance between Botswana and South Africa. This trade imbalance could be attributed to various factors such as increased importation of goods (such as food) and services not currently produced in Botswana. Factors such as trade liberalisation, globalisation and expansion of multinational retail companies may have also contributed to the increasing trend of trade flows between South Africa and Botswana.



## Government policies and support

The policy objectives for the agricultural sector are to improve food security at household and national levels, diversification of the agricultural production base, increased agricultural output and productivity, increased employment opportunities for the growing labour force, provision of a secure and productive environment for agricultural producers; and conservation of natural resources (Republic of Botswana, 2000).

To achieve the above objectives the government of Botswana has put in place and endeavours to implement a number of agricultural programmes aimed at promoting rainfed, irrigated and dairy farming by providing an enabling environment to producers. Such programmes include Arable Lands Development Programmes, Irrigation and Water Development Projects, Development of Extension Services, Dairy Improvement and other agricultural projects funded under the Financial Assistance Policy (FAP). The FAP came to an end in 2001 and Citizen Entrepreneurial Development Agency (CEDA) and Local Enterprises Authority (LEA) replaced it with the intention of empowering citizens by providing loans and other services to start and strengthen local businesses including agriculture. The government through the Ministry of Agriculture engaged the services of an Israeli consulting firm to develop a national master plan for arable agriculture and dairy development (NAMPAAD). This master plan is now being implemented.

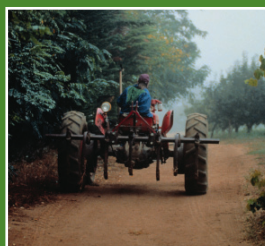
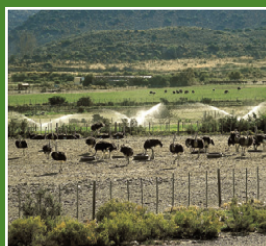
Apart from running programmes that assist farmers, the Botswana government intervenes in agricultural markets by setting trade policies intended to regulate agricultural trade. Processing industries such as grain milling, dairy and poultry are regulated via non-tariff barriers such as licensing, domestic content requirements (supermarkets must source 50% of flour products from local companies) and a ban on importing poultry. These interventions have contributed to increased production in these industries (Emongor, 2007). The rationale of trade policies is intended to protect local industries from competition and encourage local production of goods and services either for local consumption or for export. The impacts of these trade policies on the various participants in the supply chain of the affected products needs to be investigated.

## Emerging implications for small scale producers and opportunities for public and private sector intervention

The supply chains of most agricultural products are changing as supermarkets are expanding and are becoming key players in the food supply chain in Botswana. Currently small scale well capitalised farmers are able to negotiate contracts and supply supermarkets and the alternative traditional markets which are largely street vendors. This is mainly facilitated by the pro-producer policies and the institutions that the government has put in place to help develop agriculture. These policies require that supermarkets and wholesalers of FFV source locally where possible, enabling supermarkets to develop supply chains that include local producers. The impacts of these policies in relation to changing markets due to external forces such as globalisation and regional integration should be evaluated.

Lack of accessibility to irrigation water for the production of horticultural crops is a major constraint for the expansion of the FFV sector. To facilitate more producers, especially those in the traditional system, to commercialise and be included in the emerging supermarkets and global supply chains, will require all stakeholders (farmers, NGOs, donors, private sector and government) to work in partnership. The NGOs are well positioned to build the capacity of farmers in terms of adhering to quality standards, maintain consistent supply and initiate linkages with the supermarkets. Donors are helpful in financing the operations of the NGOs while the private sector ought to be collaborative and participatory. The government provides the legal framework and environment that ensures that property rights are respected and enforced. The government could also play a role in disease control as well as in the provision of market information.

Formation of cooperatives and other farmer organisations may help mitigate and lower transaction costs by grouping farmers together to provide services instead of providing services to fragmented farmers as individuals. Forming cooperatives can enable small scale farmers to pool their produce and obtain the critical supply volumes supermarkets require and simultaneously reduce transaction costs and increase the probability of successfully entering this chain.



As the FFV supply chain develops and matures, production of some products could outstrip demand. As Botswana is a relatively small market it will benefit from the development of regional, cross border and global supply chains that can mitigate its market size problems. This calls for working in partnership with SADC countries to exploit comparative advantages in each country and also to increase access to export markets.

Food quality and standards are important in driving export markets especially for beef products. Stringent food quality and safety standards increase transaction costs that impose constraints on small scale beef producers and consequentially excludes them from entering global supply chains. Transaction costs related to production and marketing of beef cattle to BMC could be reduced. For example, more resources could be used to train farmers on meat quality and standards issues and how to achieve them. Farmers, especially in the traditional production systems who own 80% of the cattle, could be trained on issues of disease control and how to produce high quality cattle. This could be achieved by improving information flow to producers regarding prices, disease conditions and meat market requirements for quality and food safety standards.

Beef exports to EU markets have been affected by strict controls introduced in the EU relating to animal diseases such as Foot and Mouth disease (FMD). FMD in Botswana is controlled through fencing sub-divisions, which separate areas where FMD is endemic, from those areas where FMD can be excluded. FMD vaccinations are a possible way of reducing the disease in areas where it is endemic. Livestock movements from FMD areas are carefully controlled through a series of quarantine camps, and cattle from FMD areas are only slaughtered in the national abattoirs during specified periods of the year. Meat from animals originating in FMD-prone areas is marketed locally, whereas meat from the FMD-free zones is sold regionally and internationally. About 50% of beef exports from Botswana end up in the UK, Norway, Greece, Germany and Holland.

### Author

Rosemary Emongor (University of Pretoria)

### Editor

Professor C Blignaut (University of Pretoria)

---

### Key references and resource papers

AGANGA, A. A., OMPHILE, U.J., MALOPE, P., CHABANGA, C.H., MOTSAMAI, G.M. AND MOTSUMI, L.G. (2000). Traditional poultry production and commercial broiler alternatives for smallholder farmers in Botswana. *Livestock Research for Rural Development* 12 (4). URL: <http://www.cipav.org.co/lrrd/lrrd12/4/Aga124a.htm>, Accessed: 16 June 2007

EMONGOR, R. A. (2007). The Impact of South African supermarkets on agricultural and industrial development in the Southern African Development Community. Draft PhD Thesis. Department of Agricultural Economics, Extension and Rural Development, University of Pretoria, Republic of South Africa

EMONGOR, R.A AND KIRSTEN, J. F. (2007). Supermarkets in the agri-food systems in the Southern African Development Community (SADC): Case study of Botswana. *Botswana Journal of Agriculture and Applied Sciences* 3(2) in print

NKHORI, P. A. (2004). The impact of transaction costs on the choice of cattle markets in Mahalapye District, Botswana. MSc (Agric) thesis. Department of Agricultural Economics, Extension and Rural Development, University of Pretoria, Republic of South Africa

NSOSO, S. J., MONKHEI, M. AND MODISE, O. M. (2005). A survey of indigenous tswana chicken farmers in Kgatleng agricultural district in

Botswana. *Journal of Agriculture and Applied Sciences* 1(1):10-18

REPUBLIC OF BOTSWANA. CENTRAL STATISTICS OFFICE. (2004a). Annual Agriculture Statistics Report 2002. Department of Printing and Publishing Services.

REPUBLIC OF BOTSWANA. CENTRAL STATISTICS OFFICE. (2004b). Statistical Bulletin, 26 (4) and 27 (1-4). Gaborone, Botswana. Department of Printing and Publishing Services.

REPUBLIC OF BOTSWANA. MINISTRY OF AGRICULTURE. (2004c). Dairy section annual report. Gaborone, Botswana.

REPUBLIC OF BOTSWANA, (2000). National Master Plan for Arable Agriculture and Dairy Development (NAMPAADD). Implementation guidelines. Ministry Of Agriculture. Department of printing and publishing services. Gaborone.

REPUBLIC OF BOTSWANA (1997). National development plan 1997/98 -2002/2003. Ministry of Finance and Development Planning. Department of Printing and Publishing Services. Gaborone.

REPUBLIC OF BOTSWANA (2003). National development plan (2003/04-2008/09). Ministry of finance and development planning.

---

### For further information contact

#### Prof. André Louw

Department of Agricultural Economics, Extension and Rural Development - University of Pretoria  
PRETORIA, 0002, South Africa

**Office** Room 2.23, Agricultural Annex  
**Phone** +27 12 420 5772  
**Fax** +27 12 420 4958  
**e-mail** andre.louw@up.ac.za

This publication is an output of the 'Regoverning Markets' programme, which is a multi-partner collaborative programme funded by the UK Department for International Development (DFID), the International Development Research Centre (IRDC), ICCO, Cordaid, the Canadian International Development agency (CIDA), and the US Agency for International Development (USAID). The programme analyses the growing concentration in the processing and retail sectors of national and regional agri-food systems and its impacts on rural livelihoods and communities in middle- and low income countries. The views expressed are not necessarily those of the funding agencies.