International Meat Secretariat
www.meat-ims.org | 596 | November | 2018

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Register now for the 2019 IMS Marketing Workshop

Banff, Alberta, Canada, 12-14 March 2019

The workshop, hosted by Canada Beef and Canada Pork International, will focus on the theme: Meat for the future -meat's place on the plate.

Join us to spend 2 ½ days sharing our campaigns and consumer insights from domestic and international markets and discussing the latest threats, challenges and opportunities facing our industry, with a particular focus on the challenges from lab grown/cell cultured meat and non-meat alternatives.

Key topics include:
- How do we position our industry going forward?
- Lab grown/cell cultured non-meat alternatives
- The future is more than just the domestic market
- An open session on "Hot Topics"

For more information on the program click here

THERE IS LIMITED SPACE, with priority for IMS members. Pre-registration (click here, to bottom of the page) does not guarantee you a spot. You will be contacted directly by the hosts for further registration and payment instructions (to guarantee your space).

Joint meeting of IMS committees on human nutrition and health, animal care, and sustainable meat: highlights

*A successful first joint meeting of the **Committees for Human Nutrition and Health, Animal Care, and Sustainable Meat** met during the week of 16-19 October at IMS Headquarters in Paris, France.*

The meeting underscored the importance of taking a broader, integrated view of the many common issues that are invariably intertwined. Healthy, well cared-for animals that are reared in sustainable environments are not only in the commercial interest of livestock supply chains, but also benefit the nutritional status of the human population. This year the joint meeting explored in greater depth some of the common concerns. In particular much of the discussion focused on the growing market in plant-based and cultured proteins as alternatives to livestock-based sources.

In stimulating a lively discussion, Director of Research at INRA Clermont-Ferrand, Dr Jean-François Hocquette gave global overview of the challenges and opportunities, given that globally over 9 billion people will need to be fed in 2050, and "business as usual" is not an option. He looked at the experiences and evidence on a wide-range of possibilities such as: having fewer children, eating less meat, following dietary guidelines, reforming agricultural policies, reducing food waste, intensifying production or adopting agro ecological farm practices.

He then focused on meat

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substitutes, particularly cultured protein. He pointed out that the costs of production of the latter are currently high (but decreasing), there are issues of consumer acceptability and palatability, ethical concerns in using bovine serum, and the health, safety and environmental impacts are not yet clear (while saving land, cultured protein uses a lot of energy), especially in the long run with larger scaled up facilities. A video of a TED presentation by Dr. Hocquette (in French) can be accessed by clicking here.

There are complex linkages – and trade offs – in the relationship between animals and humans, not least in evolving societal attitudes to animal welfare. But as the discussion showed, livestock farming provides positive benefits in using land unsuited to crop production, recycling waste inedible to humans, provides other outputs besides food, and the livelihoods of around 1 billion people globally depend on livestock supply chains. As a presentation by the International Livestock Research Institute (ILRI) to the Sustainable Meat Committee pointed out, 5 of the top 10 foods by global value are animal-sourced, 86% of dry matter eaten by livestock is inedible by humans, and 57% of land used for livestock is not suitable for crops – and rangeland is good for biodiversity.

Alternative proteins do have a part to play, and while still a small but increasing contribution to diets in terms of nutrition, the protein quality of livestock sourced foods is superior given the high density of nutrients (especially micronutrients) relative to calories.

With the evolving developments in the market for proteins, a key issues concern certification, labelling, and regulation. Certification can ensure the integrity and safety of foods; labelling helps to inform consumers as to which ingredients are in the food they buy; and regulation provides legal protection for producers and consumers. But it is imperative that to ensure the integrity of meat products there is a level playing field in the markets for meat and alternative protein sources, that certification, labelling and regulation should be "trade progressive rather than regressive" (Codex Alimentarius classifications are important in this context), and that dialogue between the meat and alternative protein industries is advisable.

The lesson of the dairy industry in Europe is salutatory: plant-based milk substitutes cannot be labelled as "milk", whereas as yet there is no restriction on using the term "meat" for substitute plant-based proteins. The IMS will coordinate sharing member analysis and experiences on alternative proteins so that members can better defend animal proteins in their own specific contexts.

The **Human Nutrition and Health Committee** presented nutrition considerations of alternative proteins. They noted that what is likely to be a highly publicised and influential report from the EAT-Lancet Commission on Food, Planet, Health will be published in The Lancet in late 2018. It purports to be the first full scientific review of what constitutes a healthy diet from a sustainable food system, and which actions can support and speed up food system transformation (https://foodplanethealth.org/the-report/). The Human Nutrition and Health Committee met earlier in the week to provide country updates, and discussed labelling, sustainable nutrition, and dietary guidelines.

The **Animal Care Committee** was informed of developments in intergovernmental organisations on antibiotics in livestock and meat (EU, Commission and Parliament), animal welfare (OIE), and antimicrobial resistance (AMR) and food safety (Codex, OIE, FAO). The IMS is an official observer in Codex meetings and follows closely these areas of concern to the livestock industry, stressing the need for the scientific basis for recommendations and working with national delegates to Codex in member countries, and sharing information.

A task force in Codex on AMR is working on drafting guidelines for the integrated monitoring and surveillance of AMR, and on code of practice to minimize and contain foodborne AMR. An encouraging development is that in some other countries antibiotic use has been reduced without resulting in a fall in production. A worrying development is that in the EU (Commission, Parliament and some Member States) there is a proposal, to come into effect in 2020, that meat treated with antibiotics should not be allowed on the EU market. However, this undermines the Codex process and can constitute a trade barrier that is not supported by scientific evidence for antibiotics used to protect animal health. The Committee is favourable to the suggestion to draft an IMS declaration on AMR, which would illustrate best practice across the industry.

A worrying development is the outbreak of African Swine Fever (ASF) in China. OIE staff noted that 43 countries that have reported AFS in the period 2016-18. This can have a significant impact on international trade in both pigs - and when animal feed is also contaminated. The effects will likely be felt in an expansion of poultry production and consumption in China, and measures concerning backyard pig production.

The OIE, in March 2018, hosted an animal welfare forum to support the implementation of OIE standards. A subsequent forum will take place in March 2019 under the theme of reconciling animal welfare with profitability. That healthy animals are profitable is a sentiment widely shared by the livestock industry!

The **Sustainable Meat Committee** was updated on developments in the FAO Hosted Global Agenda for Sustainable Livestock, FAO Hosted LEAP Partnership, ILRI (whose activities can be summarized as "Better Lives Through Livestock"), UNECE Working Party on Meat Quality Standards, Intergovernmental Panel on Climate Change (IPCC) and COP24

events on climate change, (Katowice, Poland, 3-14 December 2018), developments in the EU, and the RISE report on a "safe operating space" for livestock in the EU.

A round table on what the IMS "can do better" stimulated a lively discussion that emphasised a number of key points:

- Improving communication by focusing on shared experiences (for example the French approach on labelling alternative proteins), on best management practices, engaging in dialogue with the IDF on the dairy experience in labelling, and being pro-active rather than reactive to the criticisms of the livestock industries, stressing an integrated approach to the benefits of sustainable livestock;
- Using the IMS Marketing Worksop in Banff, Canada in March 2019 (http://www.meat-ims.org/events/marketing-workshop/) as one channel to address the challenge from alternative proteins, including exposure of misinformation;
- Encouraging the IMS Economics Committee to explore analysis of alternative proteins, possibly drawing on the OECD-FAO commodity projections;
- Continuing active involvement in intergovernmental organisations, which are influential for policy, including the FAO Hosted Global Agenda for Sustainable Livestock and LEAP, OIE, Codex, and IPCC, and ILRI's Livestock Advocacy Network – always stressing the need to base policies and regulations on sound science.

There is therefore a very full agenda for the IMS addressing the positive role of livestock for sustainability, animal welfare, and human nutrition and health, with renewed urgency for the three committees to work together in the overall interest of the industry.

Powerpoint presentations from the meetings are available on the IMS website at the following: http://www.meat-ims.org/2018-ims-committee/. IMS members have already received the password to access these documents. If you need the password, please write to Hsin.Huang@meat-ims.org.

Congratulations to newly appointed IMS committee chairs Fiona Greig (Human Nutrition and Health Committee) and Juan José Grigera Náon (Sustainable Meat). Thanks also to Mick Sloyan for kindly agreeing to continue chairing the Animal Care committee.

The IMS gratefully acknowledges the many contributions from outgoing Human Nutrition and Health Chair Veronique Droulez (Meat and Livestock Australia), and outgoing Sustainable Meat Chair Jurgen Preugschas (Canada Pork International).

OECD-FAO projects weak demand growth for meat through 2027

A decade after the food price spikes of 2007-8, production in 2017 reached record levels for cereals, meat and dairy products, while cereal stocks climbed to all-time highs. But demand growth has started to weaken, in particular in China.

New sources of global demand are not considered sufficient to maintain overall growth, and this is expected to persist over the coming decade. As a result, prices of agricultural commodities are expected to remain low, according to the latest *OECD-FAO Agricultural Outlook 2018-2027* (http://www.agri-outlook.org).

Global economic growth recovered in 2017 and for OECD countries is projected at 1.8% annually, broadly in line with the pace over the last decade. However, growth is expected to slow in China, but accelerate in India compared with the last decade.

Key highlights for livestock and meat

Production: Global meat production, which increased by 1.25% in 2017, is projected to be 15% higher in 2027, three quarters of which will come from developing countries, with poultry seeing the most rapid expansion.

In the *bovine* meat sector, cow herds have been rebuilt faster than expected in North America, which will lead to rising slaughter numbers and ample supply of meat on the world market for the coming years. Australia and Brazil are further along the herd building cycle, providing additional supplies of meat in the early years of the projection period.

Pig meat production will also increase, driven by steady herd expansion in China, which has slowed due to more stringent environmental regulations and animal welfare concerns.

Sheep meat production is also expected to increase with an expected global growth of 1.8% annually, a higher rate than in the last decade.

Consumption: In much of the developing world, per capita meat consumption remained stable in 2017 as income growth slowed. Overall, total meat consumption in developed countries will increase at approximately only a quarter of the rate in developing regions, where rapid population growth and urbanisation remain the core drivers. These drivers are particularly important in Africa, where the rate of total consumption growth over the outlook period is faster than any other region.

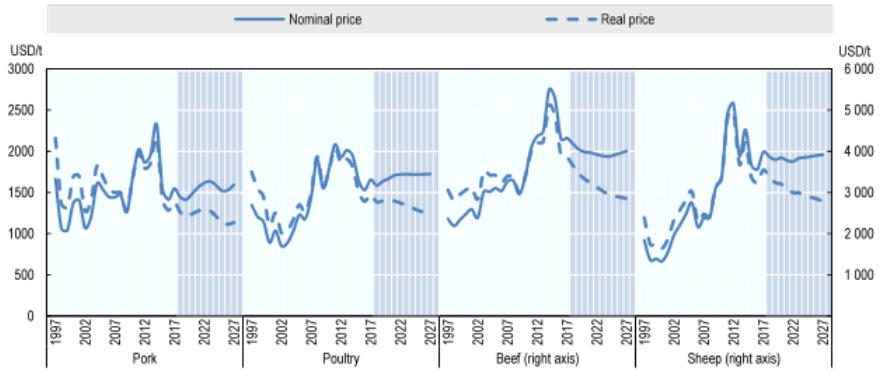
Global meat consumption per capita is expected to increase to 35.4 kg (retail weight equivalent)

by 2027, an increase of 1.1 kg compared to 2017. Consumers in developing countries are expected to increase and diversify their meat consumption towards more expensive meat such as beef and sheep meat. In per capita terms the growth will be fastest in Latin America, with an increase of 3.7 kg.

Beef consumption will increase gradually over the next ten years. By 2027, it is expected to be 8% higher than in the base period in developed countries, whereas in developing regions it is expected to increase by 21%. Global *pig meat* consumption on a per capita basis remains stable over the outlook period with consumption in most developed countries reaching saturation levels. Growth will be sustained in most of Latin America and in Asia, where population expansion still supports growth in total pork consumption. While per capita consumption of *sheep meat* in Africa, North and Latin America, and Oceania is expected to decline slightly, it will continue to expand in several Asian countries, such as China, where consumers associate sheep meat with quality and nutritional benefits, and in the Middle East and North Africa (MENA region), where it is traditionally consumed (the *Outlook* includes a special feature on the MENA region, highlighting food insecurity, water and land constraints, political instability, and volatile crude oil prices as key issues).

Prices: Measured by the FAO Meat Price Index, the monthly average for 2017 was 9% higher than in 2016, but 2.3% below the average of the preceding three years. International meat prices rose in the first half of 2017, underpinned by a significant increase in import demand for beef and pig meat. Nominal meat prices are projected to gradually increase until 2027, but prices adjusted for inflation are expected to trend downwards. In real terms, prices are expected to trend downwards for all meat types, although meat-to-feed price margins will generally remain within historical levels. Lower product prices have contributed to expanding production and consumption of poultry and pig meat.

World meat prices 1997-2017, projections to 2027



Note: US Choice steers, 1 100-1 300 lb dressed weight, Nebraska. New Zealand lamb price dressed weight, all grade average. US Barrows and gilts, No. 1-3, 230-250 lb dressed weight, Iowa/South Minnesota. Brazil: Export unit value for chicken (f.o.b.) product weight.
Source: OECD/FAO (2018), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database), http://dx.doi.org/10.1787/agr-outl-data-en.

Trade: World meat trade increased to 31 million tonnes in 2017, 1.5% higher than in 2016, but significantly slower than the 5% registered in 2016. Across categories, world trade expanded in bovine meat by 4.7% and poultry by 1%, while shipments of pig meat declined by 0.7% and sheep meat by 3%. The combined share of the two largest meat-exporting countries, Brazil and the United States, is expected to increase to around 47%, contributing nearly two-thirds of the expected increase in global meat exports over the projection period.

Globally, the share of meat output traded is expected to remain constant over the projection period, at around 10%, with most of the increase in volume coming from poultry meat. As the projected production growth in developing countries remains insufficient to satisfy demand growth, particularly in Asia and Africa, import demand is expected to remain strong throughout the outlook period. The most significant growth in the share of additional meat import will be in Asia, in particular in the Philippines and Viet Nam. Developed countries are still expected to account for more than half of global meat exports by 2027, but their share decreases slightly relative to the base period.

At the global level, meat exports (excluding live animals) are projected to be 20% higher in 2027 than in the base period. This represents a slowing down of meat trade growth to an annual average rate of 1.5% compared to 2.9% during the previous decade. However, the share of total meat output traded on the global market will remain similar in 2027 to the base period, at slightly below 10%. Global imports will increase, particularly for poultry and bovine meat, which will account for the majority of the additional meat traded in 2027. Meat imports into Asia account for 56% of global trade, and poultry will constitute more than half of this additional import demand. Rapid growth in imports from Africa is projected to increase the import share of the region by 2027. The MENA region will also increase its import of meat; the bulk of this growth will accrue to Saudi Arabia and the other Gulf States.

Uncertainties

Uncertainties related to existing or future trade agreements over the outlook period could impact and diversify meat trade patterns, together with changes in domestic policies, in particular the current negotiations on the next US Farm Bill. Multilateral trade agreements are proving difficult to ratify, which may favour bilateral trade agreements, but there are also increasing risks of unilateral trade actions.

Globally, animal disease outbreaks, sanitary restrictions, and trade policies remain the main factors driving the evolution and dynamics in world meat markets. Consumers are showing a preference for free-range meat and antibiotic-free meat products, but the extent to which they are willing and able to pay a premium for them remains unclear. Moreover, changing consumer preferences and attitudes towards meat consumption, such as the rise in vegetarian or vegan lifestyles, are relatively new and difficult to assess at this stage.

The OECD reports a growing global awareness of antibiotic use in food animal production and the risk of antimicrobial resistance (AMR) as bacteria mutate and develop traits that become resistant to the commonly used antibiotics. Not only are there concerns over the AMR effects on animal production and productivity, but on the transmission of resistant genes and bacteria between different species.

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The recently published companion OECD report, *Agricultural Policy Monitoring and Evaluation 2018* (http://www.oecd.org/tad/agricultural-policies/monitoring-and-evaluation.htm), describes and evaluates agricultural policies across countries, in particular using the OECD's measurement of support. It includes the 35 OECD countries and the six non-OECD EU member states, as well as eleven emerging economies: Brazil, the People's Republic of China, Colombia (which has now become a member of the OECD), Costa Rica, Indonesia, Kazakhstan, the Philippines, Russian Federation, South Africa, Ukraine and Viet Nam. Together, these countries account for about two-thirds of global agricultural production. In recent years, while support to producers in OECD countries has trended downwards, in some non-OECD countries, in particular China, it has increased.

Wilfrid Legg, Consultant

ASF: What It Could Mean for U.S. Pork Exports

One nation's problem can be another nation's opportunity.

So it is with African Swine Fever (ASF), presently sweeping across China dating back to August. While ASF is limited to members of the porcine family and cannot infect humans, it is a serious viral disease that can decimate hog herds. It is highly contagious, and infected pigs usually die within five to 10 days. It can be carried in meat, on the hands, on shoes, on just about anything.

Outbreaks were recorded in eastern Europe earlier this year, but ASF's presence in China, the world's largest hog producer and home country to 700 million hogs, threatens to seriously disrupt global pork markets. But for the U.S., which is ASF-free for the time being, this may drive increasing pork exports to China even as the Trump Administration's trade war with China escalates.

According to the Farm Bureau, "The many measures China has implemented to prevent the spread of the disease throughout the country have been less effective than hoped. ASF continues to resurface in provinces that it had already been discovered (Anhui, Liaoning), and has continued to spread to other provinces, reaching some of the southernmost provinces in the country (Hunan, Guizhou, Yunnan). Many in the industry fear that the number of outbreaks may be significantly underreported by the government." Reports indicate that more than 200,000 hogs have been culled in China to date.

"It may be very, very difficult to control this epidemic in China," Young S. Lyoo, a professor at the College of Veterinary Medicine at Konkuk University in South Korea, told the *Washington Post*. "And once it spreads to Asian countries, we could have big social chaos and instability."

Sinking exports

ASF's ultimate impact on the Chinese pork industry is unknown at this point, of course, but if the impact turns out to be severe, where would China fill its pork needs? The U.S. pork industry is an obvious source. As the Farm Bureau's economist Michael Nepveux notes, "It would take a very large deficit in pork for U.S. producers to overcome tariffs as high as 70 per cent on some pork products, but it is technically possible. China would likely turn to the European Union, Canada, Brazil and others first, depending how much excess pork those countries have.

The bright side on this is that U.S. pork could help backfill where these other countries have been exporting." And if the Trump Administration were able to negotiate an end to the trade war with China and the Chinese government removed retaliatory tariffs on U.S. pork, the opportunity could be much greater for the U.S. industry.

Already, ASF is having an impact on U.S. hog prices, however. Prices bottomed out in August at US$40 below the break-even point, reports the *Minneapolis Star-Tribune*, but after the Chinese outbreak made headlines, prices climbed over the break-even threshold within weeks.

ASF's disruption of the global pork market comes at an interesting time for the U.S. in terms of U.S.-China trade relations. As the U.S. Meat Export Federation noted in early September, "In China, the duty rate on U.S. pork and pork variety meat increased from 12 to 37 per cent on April 1, and to 62 per cent on July 6. July exports to the China/Hong Kong region totaled 22,199 metric tonnes, down 31 per cent from a year ago, while value dropped 19 per cent to US$55.9 million. Pork variety meat volume to China was hit especially

hard in July, dropping 49 per cent from a year ago to 7,446 metric tonnes. For January through July, pork and pork variety exports to China/Hong Kong dropped 22 per cent year-over-year in volume (238,207 metric tonnes) and 10 per cent in value (US$563 million) - due in part to the higher duty rates, but also due to an upward trend in China's domestic pork production."

(July exports of U.S. pork to markets other than China described a better picture. According to USMEF, exports to Japan —the largest market for American pork —totaled 31,248 metric tonnes in July, up 10 per cent from a year ago, while value climbed 6 per cent to US$127.2 million.)

Risk to the U.S.

There is a risk, of course, that ASF could infect the U.S. hog herd as well. As Patrick Webb, director of swine health programs for the National Pork Board said to the High *Plains Midwest Ag Journal*, "Having the increased incidence of African Swine Fever in China increases the risk and we have to be more vigilant that this is a good wake up call to know we are protecting our herd here in the United States, because we certainly don't want African Swine Fever here." According to the Swine Health Information Center, AFS is the third-highest risk to the U.S. swine industry, behind foot-and-mouth disease and classical swine fever. Earlier this year, a U.S. delegation traveled to Europe to find out how governments and pork industries there are combating ASF.

It's worth noting that Smithfield Pork, an iconic U.S. pork processing and hog producing company — Smithfield is in fact the largest U.S. pork company —, is owned by a Chinese conglomerate, the WH Group. U.S. companies own dozens of Chinese hog operations. The possibility that ASF could enter the U.S. on the shoes of a businessman or on the luggage of a hog expert is real indeed. "We've never had such a globalized industry as we have now in pork," Chris Hodges, former president of the National Pork Producers Council, told the Star Tribune.

Diseases, even diseases that infect the U.S. herd, impact domestic prices. "The last major disease outbreak among pigs was a major boon for hog prices. When porcine epidemic diarrhea virus hit the U.S. in 2013 and 2014, prices skyrocketed to their highest level ever," noted the Star-Tribune. "The same would not be true of African swine fever, said Dave Preisler, executive director of the Minnesota Pork Producers Association, because it would halt pork exports. U.S. hog farmers sell one in four pigs internationally. 'It would be awful,' he said. 'Our exports would basically go to zero. It would have a huge negative impact.'"

Steve Bjerklie, Contributing Editor, *Meat & Poultry* Magazine; correspondent, *The Economist*

Featured IMS member: Farm assured Namibian meat

The Farm Assured Namibian Meat (FAN Meat) Scheme was developed in a collaborative effort between the Meat Board of Namibia (MBN) and the Directorate of Veterinary Services (DVS) in an effort to safeguard foreign Namibian meat markets.

The need for livestock traceability and farm assurance in Namibia arose from an outbreak of Bovine Spongiform Encephalopathy (BSE) or Mad Cow Disease and the linked fatal variant Creutzfeldt - Jakob disease (vCJD) in humans in the United Kingdom from 1986 to 2001.

The Namibian Livestock and Meat Industry and DVS acted pre-emptively through the development of an extensive livestock identification and traceability system (NamLITS) which is utilized by the FAN Meat scheme to provide assurance regarding the safety, wholesomeness and quality of Namibian meat. Both the NamLITS system and FAN Meat Scheme were the first in Africa and the FAN Meat Scheme is still the only of its kind in Africa.

Cabinet pronounced the FAN Meat Scheme as a National Scheme and the Meat Board is the mandated administrator of the scheme. The Farm Assured Namibian Meat Scheme Logo symbolizes assurance for safety, wholesomeness, quality and traceability of Namibian export meat.

FAN Meat governance

All small holder and commercial farming systems are included. The rules and standards of the scheme are based on National Legislation combined with Good Agricultural

Practice and Animal Welfare principles.

In order to legally own, keep and sell livestock in Namibia, each such owner or producer of livestock must be issued with an official Stock Brand. At the same time, such owner or producer of livestock is issued with a FAN Meat number. The stock brand, producer, farm and livestock owned by such producer are linked on the National Database (NamLITS).

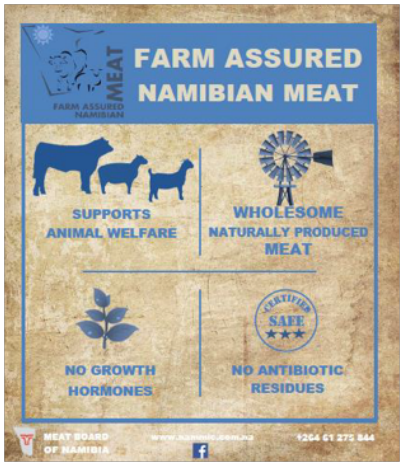
The movement of livestock in Namibia is governed by the Directorate of Veterinary Service through a system of movement permits, which is issued from the NamLITS system. In order to market livestock in Namibia, a movement permit must be obtained. Such permit can only be obtained if there is no restriction on the stock brand or farm of the owner or producer of livestock on the NamLITS database.

On an annual basis, the Directorate of Veterinary Services, which is the competent authority for animal health in Namibia, performs farm and community visits. During these visits, compliance to National Legislation and FAN Meat Standards are verified. If transgressions are encountered, the stock brand or farm is placed under restriction until such time as the transgression has been rectified.

The FAN Meat value chain

Includes producers at farm level, and non-producers, which are: Livestock Feed Processors, Agents and auctioneers, Transporters and Export Abattoirs. Non-producers are audited by the FAN Meat Division of the Meat Board on an annual basis and annual re-registration is required.

The FAN Meat promise



The Farm Assured Namibian Meat Scheme provides assurance regarding the safety, wholesomeness and traceability of Namibian produced meat. Meat produced under this scheme, which includes all Namibian Producers, is:

- Naturally produced;
- Growth Hormone free;
- Antibiotic residue free;
- Carries Negligible risk for Mad Cow Disease;
- Originates from animals which were humanely
- treated.

Recognition and use of FAN Meat

The FAN Meat Scheme was developed to provide assurance regarding the safety, wholesomeness and traceability of Namibian produced meat. The FAN Meat scheme also encompasses good agricultural practices for environmental health and sustainable production together with animal welfare requirements as recommended by the World Organisation of Animal Health (OIE). The FAN Meat Scheme is presented to markets requiring such assurance for recognition and to prevent duplication of market specific standards and efforts to verify compliance.

EDITOR'S NOTE: Does your organization have news you want to share with IMS members? You are kindly invited to submit articles to be published in future IMS newsletters.

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