

Honeybush  
(*Cyclopia species*)

AUGUST 2021



Kruger Swart Associates (KSA) were commissioned by the project ABioSA to develop this sector development plan in collaboration with sector partners and participants.

ABioSA has also commissioned a series of knowledge products for key biotrade species. These and other biotrade resources can be found at [www.abs-biotrade.info/projects/abiosa/resources](http://www.abs-biotrade.info/projects/abiosa/resources)

A glossary of biotrade terms can be found at [www.abs-biotrade.info/resources](http://www.abs-biotrade.info/resources)

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# HONEYBUSH (CYCLOPIA SPECIES)

## *Sector Development Plan*

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**For:**

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The ABS Capacity Development Initiative (ABS Compliant Biotrade in Southern Africa)

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## 1. EXECUTIVE SUMMARY

The Honeybush sector experienced a decline in exports over the previous year and a very slow domestic market uptake. The majority of the annual crop comes from wild harvested Honeybush plants and some species are threatened by overharvesting and invasion by alien plants. The different species available commercially have different tastes and consumers seem to be unaware of the different taste profiles. Furthermore, the representation of the sector is fragmented, as the SA Honeybush Tea Association (SAHTA) and the Honeybush Community of Practice (HCoP) do not have representation of all sector stakeholders. The draft Biodiversity Management Plan (BMP) was completed, the Geographic Indication (GI) application is in process and ABS permit and identification of TK holders processes are incomplete.

A major barrier to entry to the domestic and global market for new and existing actors is that consumers are not aware of the different taste profiles of Honeybush and easily confuse the tea with Rooibos. Also, the supply chain actors involved with wild harvested Honeybush noted that quality and continuous supply remain a concern.

The international analysis showed that Honeybush is authorised in food and food supplements as a tea and the main importers are Netherlands, Germany, UK and US. Four common species (*Cyclopia genistoides*, *C. intermedia*, *C. subternata*, and *C. sessiliflora*) have been identified for use in food products. It should be noted that *C. longifolia* is a significant cultivated species, but have not been authorised as a food or food supplement by the European Food Safety Authority (EFSA). The food market segment is the main market for Honeybush, and the cosmetics and pharmaceutical markets to a far lesser extent. Buyers are reluctant to develop new products if sustainability of supplies cannot be assured, both in quantity and quality.

The Sector Development Plan (SDP) addresses the various blockages in the Honeybush value chain as identified through a process of extensive consultation. The SDP includes specific strategic objectives, namely 1) Strengthen the sector organisation; 2) Create market demand; 3) Ensure consistent quality supply; and 4) Support Research & Development. Each of these objectives are supported by work packages with dedicated actions, priorities, timelines, responsibilities and costs.

## 2. INTRODUCTION

### 2.1. AIM OF SDP

The aim of the Honeybush SDP is to provide a detailed plan or roadmap to guide the development of the sector. The plan also includes details on how to engage with associated value chains, products, and markets as part of sector development.

The plan details how the sector will engage with the following aspects to ensure sector development: biodiversity/conservation status, traditional use, current economic position, existing value chains, market potential, current and future technologies, stakeholders etc.

The Honeybush SDP aims to be a succinct document and at minimum includes the strategic objectives of the sector, the actions related to the implementation of the objectives along with responsible persons or organizations, set timelines, cost and a monitoring strategy.

Within the context of the ABioSA project the Honeybush SDP provides the detailed plan to create an enabling environment for SMEs to operate and grow and for the sector to develop in a sustainable way.

## 2.1. OVERVIEW OF PROCESS FOR DEVELOPMENT OF SDP

This Sector Development Plan was prepared as part of the ABioSA project. The first step in the ABioSA work for the Honeybush sector was to determine stakeholders to be involved and consulted in the process. An original list with 29 possible companies was received from GIZ and other contact details of some of the sector organisations' members. Through the course of the implementation of the project, additional companies were identified in collaboration with the Department of Agriculture in George. Please see the final stakeholder list attached as Addendum A.

The list was used as a basis for consultation with key informants in the sector and this was supplemented by desktop research, the development and implementation of a sector wide survey and field visits to three core sector role players. Consultation focused on the different Honeybush species' geographic occurrence and size of Honeybush producers and processors, key considerations for market access, success factors for sector development and initial thoughts on the structure and functioning of a sector organization. The findings of the research and consultation were collated and shared in a stakeholder engagement workshop with sector stakeholders on 16 March 2021 to verify information and identify any gaps. Following the stakeholder engagement workshop additional consultations and field visits were held with key informants and findings from the status quo analysis reworked.

The status quo analysis and stakeholder consultation identified the following areas as priorities for inclusion in a sector strategy: 1) strengthen the sector organisation (inclusive of ABS permits), 2) create market demand, 3) ensure consistent quality supply, and 4) support research & development.

The priority areas were used as the basis for the development of the work packages included in this SDP with the addition of Industry data as another priority identified by the sector. These work packages were then reviewed by sector development experts and inputs integrated prior to being shared with sector stakeholders at the initial formation meeting of the Honeybush Joint Action Group (HJAG) on 29 May 2021. In short, the purpose of the HJAG is to provide a temporary platform to promote unity amongst the sector stakeholders on the shared challenge relating to transformation in the industry. The inputs gained from the meeting and from further individual consultations were integrated in the work packages and a final workshop will be held on 6 and 14 July 2021 for verification and approval of the final work packages and the SDP.

## 2.2. STRUCTURE OF THE SDP

The SDP is structured in four sections. First, the situational analysis will provide insight into the current composition of the sector, current status, challenges, and opportunities and how the sector is organized in order to take the sector development plan forward. Second, the strategic direction will provide the vision and mission and strategic objectives of the sector, before unpacking the specific work packages in detail. Third the financing and funding strategy for the SDP is considered, and finally the monitoring and the evaluation of the SDP within the sector will be explained.

### 3. SITUATIONAL ANALYSIS

#### 3.1. COMPOSITION OF THE SECTOR

The Honeybush sector is intricate the representation of the sector is uneven, as the current structures of the SA Honeybush Tea Association (SAHTA) and the Honeybush Community of Practice (HCoP) seem to have an uneven representation of all sector stakeholders. Only a few products are currently available on the domestic market; and most of the tea is sourced from wild harvesting. Although there are 23 species of Honeybush, only seven are used for tea production.

Please see below the composition of the Honeybush supply chain, consisting out of the different stages of the Value Chain Analysis (VCA), Value Chain Analysis Activities and Actors, and the Value Chain Analysis supporters and/or enablers.

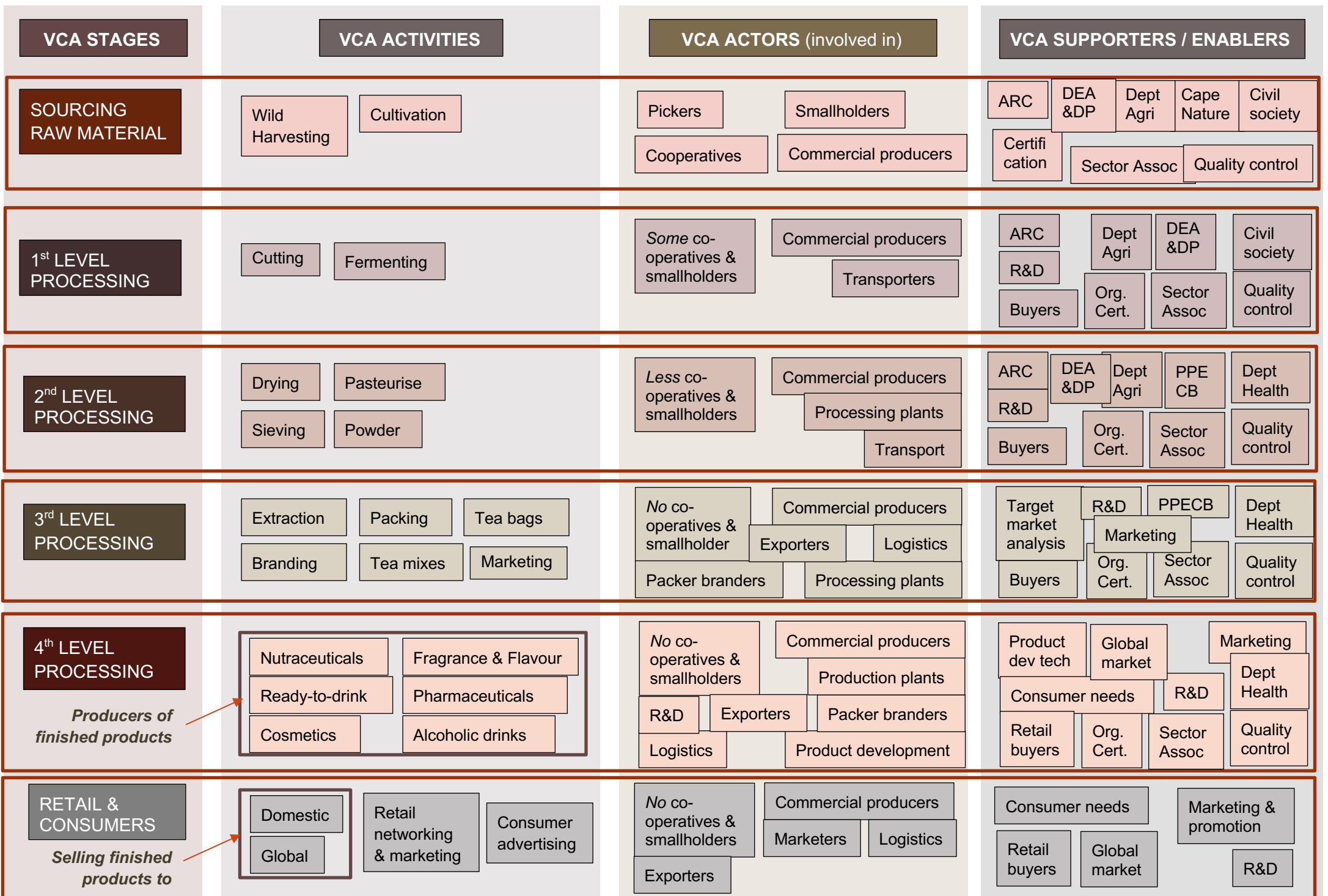


Figure 1: Composition of the Honeybush supply chain and value chain analysis



## 3.2. STATUS OF THE SECTOR

### 3.2.1. NATIONAL ANALYSIS

The Honeybush sector is probably the most complex in terms of stakeholder consultation of all sectors included in the project. The representation of the sector is fragmented, as the SA Honeybush Tea Association (SAHTA) and the Honeybush Community of Practice (HCoP) do not have representation of all sector stakeholders. Domestic market access is low with only a few products available in retail outlets currently. The different species available commercially have different tastes and consumers seem to be unaware of the different taste profiles. Supplier development is improving with the quality grading system recently developed, as well as the draft Biodiversity Management Plan in process to support continuous and quality supply of the raw material. The ABS permit and identification of Traditional Knowledge (TK) holders processes are incomplete, and the GI application is in process.

The majority of the annual crop comes from wild harvested Honeybush plants. Although there are 23 species of Honeybush, only seven are used for tea production. Some of the Honeybush species will be listed on the draft (and not gazetted) Threatened or Protected Species (TOPS) regulations when published and have different levels of concern relating their survival in the wild. None of the Honeybush species are listed on Convention on the International Trade in Endangered Species of Wild Fauna and Flora list (CITES) or have non-detrimental findings (NDFs). Threats include overharvesting, invasion by alien plants, as well as genetic contamination that occurs when cultivated Honeybush from non-local seed grows close enough for wild plants to crossbreed. With increased demand for the crop and better rates per kilogram of wet tea in comparison to cultivated tea, wild harvesting is an attractive source of income for landowners and wild harvesters. The production of Honeybush tea, including packing and branding, is relatively easier and less costly than any other type of processing where extractions or distillation are required.

A major barrier to entry to the domestic and global market for new and existing actors is that consumers are not aware of the different taste profiles of Honeybush and easily confuse the tea with Rooibos. So far only three Honeybush producers have established export markets and manage their own supply chain in terms of suppliers, distributors or retail locations, with little opportunities for smaller players to enter the supply chain. Also, the supply chain actors involved with wild harvested Honeybush noted that quality and continuous supply remain a concern.

### 3.2.2. GLOBAL ANALYSIS

The international analysis showed that Honeybush is authorised in food and food supplements as a tea and the main importers are Netherlands, Germany, UK and US. Four common species (*Cyclopia genistoides*, *C. intermedia*, *C. subternata*, and *C. sessiliflora*) have been identified by the European Food Safety Authority (EFSA) for use in food products. The food market segment is the main market for Honeybush, and the cosmetics and pharmaceutical markets to a far lesser extent.

Honeybush is registered as *Cyclopia genistoides* flower/leaf/stem extract, *C. intermedia* leaf extract, and *C. subternata* flower/leaf/stem extract in the International Nomenclature for Cosmetic Ingredients (INCI) and is listed in the European Commission cosmetics ingredients database (CosIng) with antioxidant, skin condition and/or humectant properties. Currently there is no established market and only very few products that contain this ingredient. The

product fits well with consumer and industry trends, but market growth is limited due to insufficient supplies of a varied quality. The main focus is on improving the consistency of both quality and quantity of Honeybush and ensuring that supplies are sustainable to ensure future availability. Buyers are reluctant to develop new products if sustainability of supplies cannot be assured, both in quantity and quality.

### 3.2.3. SWOT ANALYSIS

|               |   |
|---------------|---|
| Strengths     | <ul style="list-style-type: none"> <li>• Wild harvesting guidelines have already been developed to improve quality &amp; conservation</li> <li>• Growing consumer demand for health benefits of products &amp; herbal tea (national &amp; global) supported by research</li> <li>• Unique taste</li> </ul>  |
| Weaknesses    | <ul style="list-style-type: none"> <li>• Red-tape and permit systems prevents development (EC &amp; WC different)</li> <li>• Insufficient research &amp; development funding</li> <li>• No centralised body of knowledge</li> <li>• Few suppliers</li> </ul>  |
| Opportunities | <ul style="list-style-type: none"> <li>• Market demand can increase with a dedicated marketing strategy</li> <li>• Unique cultural heritage story of Honeybush can support market demand</li> <li>• Increase product range for national and global markets i.e. growing diversification of herbal tea market</li> <li>• Increase employment opportunities in Production, Wild harvesting, 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> Level Processors, Brander packers, Marketing, Export and R&amp;D</li> </ul>                                    |
| Threats       | <ul style="list-style-type: none"> <li>• Some of the smaller producers are outside of the sector organization and they have different needs in terms of market access challenges</li> <li>• Consumers confuse Honeybush with Rooibos i.e. strong competition from Rooibos</li> <li>• Unsustainable future supplies (inconsistent and quality issues)</li> <li>• Conservation status<sup>1</sup> of some wild species might restrict market for cultivated species</li> <li>• Most companies trade illegally due to ABS permit non-compliance</li> </ul> |

### 3.3. RESPONSIBILITY FOR IMPLEMENTATION

The responsible organisation for the implementation of the Honeybush SDP should be the SA Honeybush Tea Association (SAHTA), yet SAHTA currently experiences low membership fees and does not charge levies. This means that SAHTA has limited and voluntary resources for the implementation of actions indicated in the SDP. The Honeybush Community of Practice (HCoP) was established by the Western Cape Department of Environmental Affairs and Development Planning, and the Eastern Cape Department of Economic Development,

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<sup>1</sup> Some consumers are cautious to buying a natural ingredient which is threatened. Consumers therefore needs to be informed that the product has been cultivated and does not threaten the wild population

Environmental Affairs and Tourism to facilitate the implementation of Access and Benefit Sharing processes; provide for a co-operative approach amongst the role players of the HCoP mainly the national and provincial government, researchers, scientists, conservation, NGO's, farmers, harvesters and other relevant stakeholders; and to ensure sustainability in the Honeybush natural product in support of the industry<sup>2</sup>. Currently the HCoP is mostly represented by government departments and civil society, and very few producers, community cooperatives and smallholder farmers take part. For this reason, the Honeybush Joint Action Group (HJAG)<sup>3</sup> has been formed as a vehicle for smaller producers to raise funds for their priorities and have their needs represented on both SAHTA and HCoP. Also, the HJAG will focus on stimulating transformation and promote inclusive unity in the industry; and will follow the Codes of Good Practice on Broad Based Black Economic Empowerment as published in the AgriBEE Sector Code in terms of the amended Broad-Based Black Economic Empowerment Act (notice 1354 of 2017). The HJAG will function as a temporary platform until such time when permanent transformation in both SAHTA and HCoP structures have been achieved.

It is recommended that the HJAG applies for external funding to achieve its transformation goals. During this process, the HJAG will start with a collaborative process with the current SAHTA management structure in order to support transformation and inclusive representation of the industry on SAHTA's management. The HJAG will further support the HCoP to ensure producer representation on all levels. Herewith a diagram of the proposed changes to the structure of an inclusive industry association:

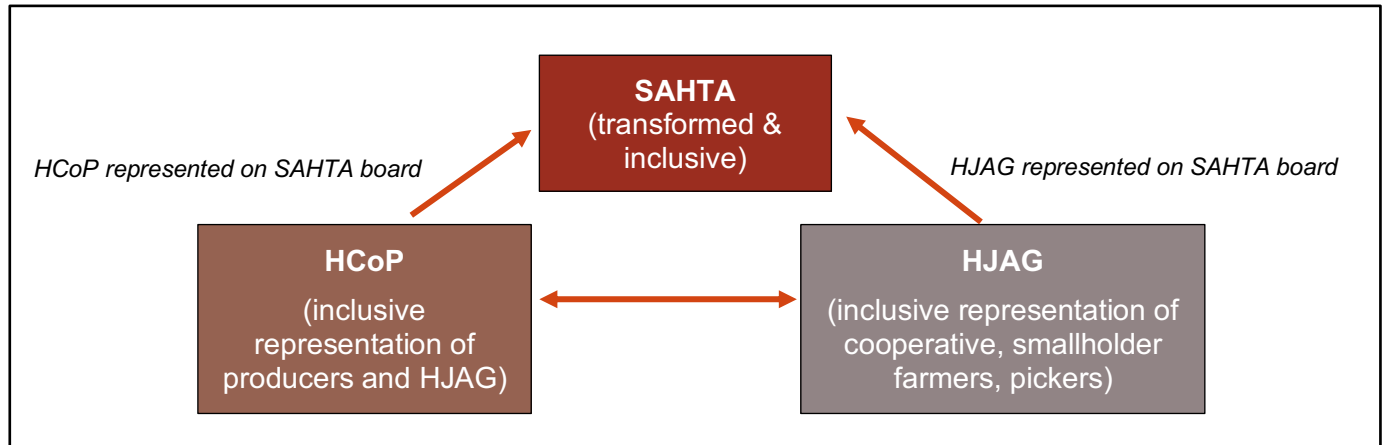


Figure 2: Proposed structure of an inclusive industry representative association

<sup>2</sup> See the attached Addendum C: Terms of Reference of the Honeybush Community of Practice

<sup>3</sup> See the attached Addendum D: Terms of Reference of the Honeybush Joint Action Group

## 4. STRATEGIC DIRECTION

### 4.1. VISION & MISSION

#### Mission

The SA Honeybush Tea Association (SAHTA), the Honeybush Community of Practice (HCoP) and the Honeybush Joint Action Group (HJAG) are collectively working together to promote, protect and support the growth of a sustainable Honeybush Industry, inclusive of all its stakeholders.

#### Vision

The creation of a resilient and vibrant Honeybush industry able to take advantage of domestic and global market opportunities and create value for all involved.

#### Core values

- To promote transformation, equitable and inclusive access and participation of the Honeybush industry in SAHTA, HCoP and HJAG
- A transformed SAHTA to represent the Honeybush Industry on regulatory level in a strategic manner and to engage proactively with relevant parties on national and international level to protect and promote the interest of the industry
- To support and strive for the creation of a stable and sustainable environment where the Honeybush industry can thrive and grow
- To support the BMP and thereby develop and implement strategies to protect and enhance the natural environment and biodiversity crucial for the continued success of the industry and the protection of the Honeybush species as part of the indigenous resources of South Africa

### 4.2. TARGETS

The table below provides an alignment between the different capacities of resilience and the pro-poor targets identified for the broader biotrade environment. The purpose of this alignment is to follow the impacts that the building of the different capacities aims to have on improving the resilience of the biotrade industry against shocks, with specific reference to the Honeybush sector. The alignment between the different capacities of resilience and the pro-poor targets also identifies the learning that needs to take place, as well as the accountability of sector associations and other role players to actively support the building of the different capacities of resilience. The evaluation indicators and targets are detailed in the tables on the following page (VALUATION INDICATORS & TARGETS).

VALUATION INDICATORS & TARGETS

| HONEYBUSH SECTOR: ABSORPTIVE CAPACITIES  |   |                            |   |   |  |
|--|---|----------------------------|---|---|--|
| CURRENT MAJOR STRESS FACTORS   | <b>ACTIONS NEEDED:</b><br>INTENTIONAL PROTECTIVE ACTIONS TO COPE WITH STRESS FACTORS  | PRO-POOR TARGETS ALIGNMENT |   | RELATION TO SDP OUTCOMES  | TARGETS  |
|  |   | DIMENSIONS OF POVERTY      | FOCUS AREA  |   |  |
| Honeybush consumers are not informed about the different tastes & quality grades | <ul style="list-style-type: none"> <li>Develop and implement a generic marketing strategy to introduce the different species' tastes to different consumer groups including retailers, exporters and the public</li> <li>Provide the different consumer groups with sufficient and ongoing information in order to make an informed choice</li> </ul> | Socio-economic status      | <ol style="list-style-type: none"> <li>1. Employment &amp; income generation</li> <li>2. Business assets</li> <li>3. Scientific research supporting marketing strategy</li> </ol> | <ol style="list-style-type: none"> <li>1. Job creation</li> <li>2. Improved quality of life and ability to create employment</li> <li>3. Improve access to markets backed by scientific claims</li> <li>4. Sector growth</li> </ol> | <p>Biotrade businesses create 10% more employment opportunities by 2025</p> <p>An increase of 10% in employment opportunities for women, youth and other vulnerable individuals annually</p> |
| Consumers are confused between Honeybush & Rooibos                               |   |                            |   |   |  |
| Wild harvested tea is perceived to be of better quality than cultivated tea      |   |                            |   |   |  |
| Unverified and outdated industry information                                     | Obtain funding for secretariat functions such as updating and verifying industry information  | Socio-economic status      | <ol style="list-style-type: none"> <li>1. Market intelligence</li> </ol>  | <ol style="list-style-type: none"> <li>1. Access to current market information</li> <li>2. Sector growth</li> </ol>   | <p>Improved biotrade businesses' competitiveness &amp; income opportunities through 30% increase in new markets accessed annually</p>  |
| Low domestic and global market demand  | Increase information and access to regional and global trade promotion initiatives  |                            |   |   |  |

|                        |   |  |  |  |   |
|------------------------|---|--|--|--|---|
| Lack of research funds | Investigate different funding options to support research priorities. |  | 1. Scientific research supporting marketing strategy | 1. Improve access to markets backed by scientific claims<br>2. Sector growth | Biotrade businesses use scientific claims in marketing to increase sales and revenue as a result of dedicated research funding of R 10 million. |
|------------------------|---|--|--|--|---|

### HONEYBUSH SECTOR: ADAPTIVE CAPACITIES

| THREATS   | <b>ACTIONS NEEDED:</b><br>INTENTIONAL ADJUSTMENTS IN ANTICIPATION OF CHANGE                                      | PRO-POOR TARGETS ALIGNMENT              |                                | RELATION TO SDP OUTCOMES  | TARGETS   |
|---|--|---|--------------------------------|---|---|
|   |  | DIMENSIONS OF POVERTY                   | FOCUS AREA                     |   |   |
| Sector not compliant with ABS regulations and currently trading illegally | Develop a collective industry-wide ABS agreement and draft a step-by-step guide on completing the permit process | Natural resources as a livelihood asset | 1. Compliance with ABS         | 1. Supply chain actors have valid ABS permits   | 80% improvement per year of supply chain actors being compliant   |
| Incomplete GI registration  | Plot next steps required to complete GI application in terms of process to move from MMA to APS                  | Natural resources as a livelihood asset | 1. Geographic Indicator status | 1. To protect the geographic origin of the natural resource   | Honeybush obtained protected PDO and/or PGI status by 2025  |
| Over-harvesting of wild species threatened with extinction                | Introduce sustainable wild harvesting practices and obtain participation from all wild harvesters (incl youth)   | Education & skills development          | 1. Skills development          | 1. Sector-level skills development will lead to improved quality throughout the biotrade supply chain<br>2. Technology transfer | Guidelines relating to good practices and improved processing methods developed in such a way to overcome illiteracy barriers by 2024 |

| Inconsistent quality supply                        | Develop context specific cultivation guidelines; Support ARC with introduction and implementation of QGS         | Natural resources as a livelihood asset | 1. Consistent quality supply                   | 1. Conservation & sustainable use biodiversity<br>2. Technology transfer<br>3. Sector growth | Negative environmental impacts of biotrade activities mitigated and reported in BMP annually                                       |
|--|--|---|--|--|--|
| Degraded lands and ecosystems                      | Develop alien vegetation clearance plan to promote job creation through land clearance and ecosystem restoration | Natural resources as a livelihood asset | 1. Impacts on & limitations of natural capital |  | Integrity of ecosystems restored and reported in BMP annually  |
| HONEYBUSH SECTOR: TRANSFORMATIVE CAPACITIES        |  |   |  |  |  |
| TRANSFORMATION REQUIRED                            | <b>ACTIONS NEEDED:</b><br>INTENTIONAL CHANGES TO REDUCE CAUSES OF RISK   | PRO-POOR TARGETS ALIGNMENT              |  | RELATION TO SDP OUTCOMES   | TARGETS  |
|  |  | DIMENSIONS OF POVERTY                   | FOCUS AREA                                     |  |  |
| Sector associations not representative of industry | Honeybush Joint Action Group formed to provide transformation support to the sector association                  | Representation, inequality & gender     | 1. Representation & inclusivity                | 1. Representation, transparency and inclusivity of minority groups in industry body          | Honeybush sector has more power to lobby for better outcomes at different forums via transformed sector representation by end 2021 |
| Low value chain development                        | Analyse current product range offerings and investigate the gap in the market for Honeybush products.            | Socio-economic status                   | 1. Market intelligence                         | 1. Access to current market information<br>2. Innovation<br>3. Technology transfer           | 30% annual improved & current market intelligence on product ranges resulted in increased & competitive                            |

|   |   |  |   |   |  |
|---|---|--|---|---|--|
|   |   |  |   | 4. Sector growth  | advantage & income opportunities   |
| Under-utilisation of existing processing plants | Determine current processing plant numbers and production capacity, and link to smaller producers<br><br>Promote job creation through functioning aggregator hubs   |  | 1. Employment & income generation<br><br>2. Assets<br><br>3. Health & well-being          | 1. Increase in production of quality products<br><br>2. Acquiring more business assets<br><br>3. Biotrade SMMEs & communities have a better income and afford more food & health care | 2 Additional existing processing plants optimally utilised resulted in improved market access, more employment opportunities & well-being of biotrade communities    |
| Lack of access to market                        | Sector association to actively and continuously implement the actions of the proposed generic marketing strategy to introduce the different species' tastes to different consumer groups, retailers and exporters |  | 1. Employment & income generation<br><br>2. Business assets<br><br>3. Market intelligence | 1. Job creation<br><br>2. Ability to create employment<br><br>3. Have continuous and current information on customer trends & requirements  | Generic marketing strategy resulted in increase in demand and better-informed retail buyers & end-user consumers. Products available in 3 retail stores country-wide |

Table 1: Evaluation indicators and targets

#### 4.3. KEY STRATEGIC OBJECTIVES

- Objective 1: Strengthen the sector organisation
- Objective 2: Create market demand
- Objective 3: Ensure consistent quality supply
- Objective 4: Support Research & Development

The Key Strategic Objectives and corresponding work packages are detailed in [4.4. IMPLEMENTATION ACTIONS.](#)



#### 4.4. IMPLEMENTATION ACTIONS

| OBJECTIVE 1: STRENGTHEN THE SECTOR REPRESENTING ORGANISATION               |                                |  |  |                                   |  |   |
|--|--------------------------------|--|--|-----------------------------------|--|---|
| Work Package 1.1.  |                                | PROMOTE INCLUSIVITY AND UNITY IN SECTOR ASSOCIATIONS |  |                                   |  |   |
| Action   | Priority                       | Timeframe  | Responsible  | Resources required                | Collaborations and alignments  | Outcomes  |
| Form Joint Action Group  | Critical (solved asap)         | April – Dec 2021                                     | <ul style="list-style-type: none"> <li>Relevant sector stakeholders to facilitate formation of HJAG</li> <li>HJAG to outline its terms of reference</li> </ul>                   | Sector representing organisations | ABioSA<br>DFFE <sup>4</sup><br>SAHTA <sup>5</sup><br>HCoP <sup>6</sup> | HJAG supported by terms of reference                              |
| Work Package 1.2.  |                                | TRANSFORMATION SUPPORT TO SAHTA & HCoP               |  |                                   |  |   |
| Action   | Priority                       | Timeframe  | Responsible  | Resources required                | Collaborations and alignments  | Outcomes  |
| Present HJAG's terms of reference to current SAHTA board, HCoP and Hortgro | Short term (6 months - 1 year) | May 2021 – May 2022                                  | <ul style="list-style-type: none"> <li>Relevant sector stakeholders to approach SAHTA chairperson and consult HORTGRO to explain HJAG &amp; process of transformation</li> </ul> | Sector representing organisations | DFFE<br>SAHTA<br>HCoP<br>Hortgro <sup>7</sup>                          | SAHTA transformation & inclusive; HCoP representative of industry |

<sup>4</sup> Department of Fisheries, Forestry and Environment

<sup>5</sup> SA Honeybush Tea Association

<sup>6</sup> Honeybush Community of Practice

<sup>7</sup> <https://www.hortgro.co.za/>

| <i>Work Package 1.3.</i>   |                                | OBTAIN FUNDING FOR SECRETARIAT FUNCTIONS |  |  |   |   |
|--|--------------------------------|--|--|--|---|---|
| <i>Action</i>  | <i>Priority</i>                | <i>Timeframe</i>                         | <i>Responsible</i>   | <i>Resources required</i>  | <i>Collaborations and alignments</i>                  | <i>Outcomes</i>   |
| Present terms of reference of HJAG and transformation of sector association to GEF6                                      | Short term (6 months - 1 year) | May 2021 – May 2022                      | Relevant sector stakeholders to approach GEF 6 for funding                   | External funding – either competent BSO <sup>8</sup> /consultant | GEF 6 <sup>9</sup><br>DFFE<br>SAHTA<br>HCoP           | Funding to sustain transitional period of transformation towards an inclusive sector organisation |
| Appoint secretariat incl project manager, BMP coordinator, financial & data/research managers to support SDP development | Ongoing, starting 2022         | May 2021 – May 2022                      | This is based on three part time positions @ 3 days per month @R5000 per day | External funding – either competent BSO/consultant               | GEF 6<br>Cape Nature<br>DFFE<br>SAHTA<br>HCoP<br>HJAG |   |
| Review ToR <sup>10</sup> of current SAHTA secretariat function and expand to include additional functions                | Short term (6 months - 1 year) | May 2021 – May 2022                      | Relevant sector stakeholders to approach HORTGRO for secretariat input       | External funding – either competent BSO/consultant               | GEF 6<br>DFFE<br>SAHTA<br>HCoP<br>HJAG                |   |
| Draft ToR for secretariat of sector representing organisation and circulate for input of sector                          | Medium term (1 -2 years)       | May 2022 – May 2023                      | Sector representing organisations to appoint a secretariat                   | Sector representing organisations                                | GEF 6<br>DFFE<br>SAHTA<br>HCoP<br>HJAG                | Functioning secretariat to support the industry   |

<sup>8</sup> Business Support Organisation

<sup>9</sup> <https://www.thegef.org/gef-period/gef-6>

<sup>10</sup> Terms of Reference

|   |                                      |  |   |  |  |  |
|---|--------------------------------------|--|---|--|--|--|
| Update industry profile in collaboration with Gillian McGregor <sup>11</sup>                      | Ongoing and reviewed on annual basis | Jan 2022 – Dec 2022  | Sector representing organisations to appoint a dedicated person/committee                                   | Rhodes University<br>DFFE<br>SAHTA<br>HCoP | ABioSA<br>Sector organisations   | Updated and verified industry information available  |
| <b>Work Package 1.4.</b>  |                                      | <b>ENSURE SECTOR ABS LEGISLATION &amp; PERMIT COMPLIANCE</b> |   |  |  |  |
| <i>Action</i>   | <i>Priority</i>                      | <i>Timeframe</i>   | <i>Responsible</i>  | <i>Resources required</i>                  | <i>Collaborations and alignments</i>   | <i>Outcomes</i>  |
| Identify actions & resources needed to ensure ABS sector compliance through a collective approach | Medium term (1 -2 years)             | Jan 2022 – Dec 2022  | Sector representing organisations to appoint a dedicated person/committee                                   | DFFE<br>SAHTA<br>HJAG<br>HCoP              | BioInnovation<br>Africa<br>DFFE<br>UEBT  | Collective industry-wide ABS agreement and permits; value chain analysis; compliant industry |
| Commence with ABS negotiations  | Medium term (1 -2 years)             | Jan 2022 – Dec 2022  | Sector representing organisations to appoint a dedicated person/committee                                   | DFFE<br>SAHTA<br>HJAG<br>HCoP              | BioInnovation<br>Africa<br>DFFE<br>UEBT  | Collective industry-wide ABS agreement and permits; compliant industry                       |
| Harvesters and industry prove prior written consent and legal access as per legislation           | Ongoing                              | Start Jan 2022   | Sector representing organisations to appoint a dedicated person/committee focusing on prior written consent | DFFE<br>SAHTA<br>HJAG<br>HCoP              | Industry, DEDEAT <sup>12</sup> , CapeNature, ECPTA <sup>13</sup> and private and communal landowners | Written consent received from private and communal landowners                                |

<sup>11</sup> <https://www.ru.ac.za/geography/staff/gillianmcgregor/>

<sup>12</sup> Eastern Cape Department of Economic Development, Environmental Affairs and Tourism

<sup>13</sup> Eastern Cape Parks & Tourism Agency

|  |                                |   |   |                               |   |  |
|--|--------------------------------|---|---|-------------------------------|---|--|
| Maintain advocacy and community participation  | Ongoing                        | Start Jan 2022                                | Sector representing organisations to appoint a dedicated person/committee focusing on communities | DFFE<br>SAHTA<br>HJAG<br>HCoP | Natural Justice;<br>DFFE  | Communities fully aware of the process and how they can participate                          |
| A BSA <sup>14</sup> is negotiated by industry & relevant communities, assisted by government                               | Ongoing                        | Start Jan 2022                                | Sector representing organisations to appoint a dedicated person/committee focusing on BSA         | DFFE<br>SAHTA<br>HJAG<br>HCoP | DFFE<br>(BSA Unit)  | BSA negotiated and in place  |
| <i>Work Package 1.5.</i>   |                                | <b>SUPPORT SECTOR WITH PERMITTING ASPECTS</b> |   |                               |   |  |
| <i>Action</i>  | <i>Priority</i>                | <i>Timeframe</i>                              | <i>Responsible</i>  | <i>Resources required</i>     | <i>Collaborations and alignments</i>  | <i>Outcomes</i>  |
| Investigate differences between the Western Cape & Eastern Cape permit system  | Short term (6 months - 1 year) | Dec 2021 – April 2022                         | Sector representing organisations to appoint a dedicated person/committee dealing with permits    | SAHTA<br>Secretariat<br>HJAG  | CapeNature, ECPTA, WCDoA <sup>15</sup> , DEDEAT   | Better understanding of permit system and blockages in both provinces                        |
| Advise & strengthen relevant permitting authorities to avoid issuing permits / authorisations for ploughing of virgin land | Ongoing                        | Starting Apr 2022                             | Sector representing organisations to appoint a dedicated person/committee dealing with permits    | SAHTA<br>Secretariat<br>HJAG  | BMP <sup>16</sup> implementing agent: DEA&DP <sup>17</sup> (Environmental Law Enforcement), | Step-by-step guide on permit process available to suppliers and processors in both provinces |

<sup>14</sup> Benefit-Sharing Agreement

<sup>15</sup> Western Cape Department of Agriculture

<sup>16</sup> Biodiversity Management Plan

<sup>17</sup> Department of Environmental Affairs and Development Planning

|  |                                |   |  |                           |   |   |
|--|--------------------------------|---|--|---------------------------|---|---|
| Support permitting authorities to exercise control and monitoring of unlawful activities   |                                |   |  |                           | CapeNature, ECPTA, WCDoA, DEDEAT (Compliance & Enforcement) |   |
| Provide suggestions on how the sector organisation can streamline the process  | Short term (6 months - 1 year) | April 2022 – Apr 2023                               | Sector representing organisations to appoint a dedicated person/committee dealing with permits | SAHTA Secretariat HJAG    | CapeNature, ECPTA, WCDoA, DEDEAT                            | Less red tape in obtaining permits                              |
| Promote proactive compliance on legislative provisions of land use and ensure adequately resourced compliance monitoring of unlawful activities on virgin land | Ongoing                        | Starting Apr 2022                                   | Sector representing organisations to appoint a dedicated person/committee dealing with permits | SAHTA Secretariat HJAG    | DFFE, DALRRD, DEDEAT, DEA&DP, CapeNature                    | Improved compliancy and decrease in unlawful use of virgin land |
| <i>Work Package 1.6.</i>   |                                | <b>SUPPORT SECTOR WITH IMPLEMENTING LEGISLATION</b> |  |                           |   |   |
| <i>Action</i>  | <i>Priority</i>                | <i>Timeframe</i>                                    | <i>Responsible</i>   | <i>Resources required</i> | <i>Collaborations and alignments</i>                        | <i>Outcomes</i>   |
| Implement & enforce TOPS <sup>18</sup> & BABS <sup>19</sup> regulations  | Ongoing                        | Start Jan 2022                                      | Sector representing organisations to appoint a dedicated person/committee focusing on BSA      | DFFE SAHTA HJAG HCoP      | DFFE (BSA Unit)   | BSA compliancy throughout Honeybush sector                      |

<sup>18</sup> Regulatory terms of the Threatened or Protected Species regulations

<sup>19</sup> Bio-prospecting, Access and Benefit Sharing regulations

|   |                 |  |   |                               |  |   |
|---|-----------------|--|---|-------------------------------|--|---|
| Support landowners, land managers & local communities to implement new legislation  | Ongoing         | Start June 2022  | Sector representing organisations to appoint a dedicated person/committee focusing on BSA & communities | DFFE<br>SAHTA<br>HJAG<br>HCoP | DFFE<br>(BSA Unit)<br>Natural Justice        | Support provided to implement new legislation, i.e., BABS & IKS <sup>20</sup> regulations |
| <b>Work Package 1.7.</b>  |                 | <b>MONITORING &amp; EVALUATION OF CONSERVATION AS A RESULT OF BIOTRADE</b> |   |                               |  |   |
| <i>Action</i>   | <i>Priority</i> | <i>Timeframe</i>   | <i>Responsible</i>  | <i>Resources required</i>     | <i>Collaborations and alignments</i>         | <i>Outcomes</i>   |
| Introduce a M&E <sup>21</sup> system to track extent of Honeybush conservation, genes, species & ecosystems derived through biotrade/ bio-prospecting permits | Ongoing         | Start Jan 2024   | Sector representing organisations to appoint a dedicated person/committee focusing on conservation M&E  | DFFE<br>SAHTA<br>HCoP         | DFFE<br>(BSA Unit)<br>Academic partner – UCT | Use of Honeybush for biotrade and bioprospecting monitored                                |

## OBJECTIVE 2: CREATE MARKET DEMAND

|  |                        |   |                                |                           |                                      |                                   |
|--|------------------------|---|--------------------------------|---------------------------|--------------------------------------|-----------------------------------|
| <b>Work Package 2.1.</b>                 |                        | <b>DEVELOP A GENERIC MARKETING CAMPAIGN</b> |                                |                           |                                      |                                   |
| <i>Action</i>                            | <i>Priority</i>        | <i>Timeframe</i>                            | <i>Responsible</i>             | <i>Resources required</i> | <i>Collaborations and alignments</i> | <i>Outcomes</i>                   |
| Identify current domestic trade barriers | Critical (solved asap) | April – Dec 2021                            | Part of the ABioSA SDP project | ABioSA                    | SAHTA<br>HJAG<br>HCoP                | Current trade barriers identified |

<sup>20</sup> Protection, Promotion, Development and Management of Indigenous Knowledge Act 6 of 2019

<sup>21</sup> Monitoring & Evaluation

|   |                                |                           |  |  |   |   |
|---|--------------------------------|---------------------------|--|--|---|---|
| Develop marketing strategy to introduce Honeybush to consumers and retail (domestic and global) | Critical (solved asap)         | April – Dec 2021          | Sector representing organisations to consult a marketing strategy service provider | SAHTA<br>HJAG<br>HCoP                                  | Garden Route Municipality<br>Western Cape Department of Agriculture<br>GEF6                                     | Monthly media release; update Sector representing organisation's website; coordinate all media enquiries; Actively promote consumer knowledge; Consumer developed a taste for the different species; Honeybush gained own market identity |
| Develop eco-tourism plan and actions to communicate the unique story of Honeybush               | Short term (6 months - 1 year) | May 2021 – May 2022       | Sector representing organisations to consult an eco-tourism service provider       | SAHTA<br>HJAG<br>HCoP<br>Herold Meander<br>Tourism NPC | Garden Route Municipality;<br>Western Cape Department of Agriculture;<br>Eastern Cape province & municipalities | Griqua cultural heritage eco-tourism routes developed; Langkloof & Tsitsikamma Honeybush eco-tourism routes developed   |
| Training of youth as tea sommeliers   | Ongoing                        | August 2021 – August 2026 | Sector representing organisations to consult and appoint the service provider      | SAHTA<br>HJAG<br>HCoP<br>Herold Meander<br>Tourism NPC | Garden Route Municipality<br>Western Cape Department of Agriculture;<br>Eastern Cape                            | Consumers developed a taste for the different species and increase demand for   |
| Coordinate the annual Honeybush Tea Festival  |                                |                           |  |  |   |   |

|   |                          |                     |  |  |  |   |
|---|--------------------------|---------------------|--|--|--|---|
|   |                          |                     |  |  | province & municipalities                | Honeybush in retail   |
| Dissemination of information on climate change impacts  |                          |                     | Sector representing organisations to create portfolio focusing on climate change | SAHTA Secretariat HJAG                       | DFFE, DALRRD, DEDEAT, DEA&DP, CapeNature | All stakeholders aware of the impact of climate change  |
| <i>Work Package 2.2.</i>  |                          |                     | INVESTIGATE DECLINING EXPORTS  |  |  |   |
| <i>Action</i>   | <i>Priority</i>          | <i>Timeframe</i>    | <i>Responsible</i>   | <i>Resources required</i>                    | <i>Collaborations and alignments</i>     | <i>Outcomes</i>   |
| Request PPECB to provide export figures and compare with industry figures   | Medium term (1 -2 years) | May 2021 – May 2022 | Sector association secretariat to approach PPECB and sector association          | Sector association secretariat               | PPECB                                    | Obtain a better overview of fluctuation in exports and reasons  |
| <i>Work Package 2.3.</i>  |                          |                     | COMPLETE GI APPLICATION  |  |  |   |
| <i>Action</i>   | <i>Priority</i>          | <i>Timeframe</i>    | <i>Responsible</i>   | <i>Resources required</i>                    | <i>Collaborations and alignments</i>     | <i>Outcomes</i>   |
| Plot next steps required to complete GI application in terms of process to move from MMA to APS and the GI Registration | Medium term (1 -2 years) | Jan 2022 – Dec 2022 | Sector representing organisations to appoint a dedicated person/committee        | KSA<br>Dirk Troskie<br>SAHTA<br>HJAG<br>HCoP | CIRAD <sup>22</sup>                      | GI registration received; administrative tasks completed; industry informed; developed the Agricultural Product Standards Act (APS) for Honeybush |

<sup>22</sup> CIRAD is the French agricultural research and cooperation organization working for the sustainable development (<https://www.cirad.fr/en>)



| <i>Work Package 2.4.</i>  |                                 | GLOBAL TRADE PROMOTION |  |                                |   |  |
|---|---------------------------------|------------------------|--|--------------------------------|---|--|
| <i>Action</i>   | <i>Priority</i>                 | <i>Timeframe</i>       | <i>Responsible</i>   | <i>Resources required</i>      | <i>Collaborations and alignments</i>  | <i>Outcomes</i>  |
| Investigate current global trade barriers   | Critical (solved asap)          | April – Dec 2021       | Part of the ABioSA SDP project   | ABioSA                         | SAHTA<br>HJAG<br>HCoP   | Current trade barriers identified                                |
| Investigate type of trade promotion initiatives available   | Short term (6 months - 1 year)  | Aug 2022 – May 2023    | Sector representing organisations to consult a marketing strategy service provider | Sector association secretariat | DTIC <sup>23</sup>  | Information on and access to trade fairs & exhibitions available |
| Investigate and promote quality assurance to boost domestic & global market demand  | Short/medium term (1 - 2 years) | May 2022 – May 2024    | Sector representing organisations to consult a marketing strategy service provider | Sector association secretariat | DTIC; Biotrade and Certification  | Marketing strategy and quality grading system aligned            |
| Investigate different types of certification options, such as organic; ethical sourcing systems; & ingredient certification |                                 |                        |  |                                | UEBT/Rainforest Alliance Herbs & Spices Program (UEBT/UTZ Herbal Tea Programme) |  |

### OBJECTIVE 3: ENSURE CONSISTENT QUALITY SUPPLY

| <i>Work Package 3.1.</i> |                 | EXPAND CURRENT SUSTAINABLE HARVESTING GUIDELINES & ECOLOGICALLY APPROPRIATE CULTIVATION |                    |                           |                                      |                 |
|--------------------------|-----------------|---|--------------------|---------------------------|--------------------------------------|-----------------|
| <i>Action</i>            | <i>Priority</i> | <i>Timeframe</i>  | <i>Responsible</i> | <i>Resources required</i> | <i>Collaborations and alignments</i> | <i>Outcomes</i> |

<sup>23</sup> Department of Trade, Industry & Competition

|  |                                |                      |  |   |  |   |
|--|--------------------------------|----------------------|--|---|--|---|
| Investigate the quality perception of wild harvested vs cultivated   | Short term (6 months - 1 year) | Aug 2021 – Aug 2022  | ARC <sup>24</sup> and sector organisation(s)   | SAHTA<br>HJAG<br>HCoP                           | Rhodes University<br>ARC   | Available information on the quality of wild harvested species and cultivated species |
| Review & revise sustainable harvesting guidelines for <i>C. subternata</i> & <i>C. intermedia</i> based on lessons learned <sup>25</sup> | Short term (6 months - 1 year) | July 2023 – Apr 2024 | Sector representing organisations to create a portfolio for the review of guidelines | Sector association secretariat<br>HCoP<br>SAHTA | Gillian McGregor,<br>Rhodes University,<br>SANBI, DFFE,<br>DALRRD,<br>DEDEAT,<br>DEA&DP,<br>CapeNature | Updated sustainable harvesting guidelines available                                   |
| Draft guidelines on traceability throughout the value chain  | Short term (6 months - 1 year) | Oct 2023 – June 2024 |  |   |  |   |
| Include outcomes of resource assessments inclusive of management advice <sup>26</sup>  | Short term (6 months - 1 year) | Dec 2023 – June 2024 |  |   |  | Outcomes communicated to value chain actors   |
| Develop integrated land management plans (whole farm plans)  | Medium term (2 – 3 years)      | Jan 2024 – Jun 2026  | Sector representing organisations to create a portfolio for integrated land          | Sector association secretariat<br>HCoP<br>SAHTA | SANBI, DFFE,<br>DALRRD,<br>DEDEAT,<br>DEA&DP,  | Integrated land management plans developed & communicated to value chain              |

<sup>24</sup> Agriculture Research Council

<sup>25</sup> From implementation of the current wild harvesting guidelines

<sup>26</sup> Applicable to other commercial *Cyclopia* species

|   |                          |   |  |   |   |  |
|---|--------------------------|---|--|---|---|--|
|   |                          |   | management plans development   |   | CapeNature, Living Lands  |  |
| Develop protocol and cultivation guidelines for ecologically appropriate cultivation of Honeybush & minimisation of genetic contamination & erosion in wild populations |                          |   | Sector representing organisations to create a portfolio for ecologically appropriate cultivation practices | Sector association secretariat<br>HCoP<br>SAHTA<br>HJAG | WCDoA (Farmer Support, Development & Research, Technology and Development Services),<br>DEA&DP,<br>Eastern Cape Agriculture,<br>ARC, academia |  |
| Promote establishment of Cyclopia orchards from local genetic stock <sup>27</sup>   |                          |   |  |   |   |  |
| <b>Work Package 3.2.</b>  |                          | <b>SUPPORT ROLL-OUT OF QUALITY GRADING SYSTEM</b> |  |   |   |  |
| <i>Action</i>   | <i>Priority</i>          | <i>Timeframe</i>                                  | <i>Responsible</i>   | <i>Resources required</i>                               | <i>Collaborations and alignments</i>  | <i>Outcomes</i>  |
| Support ARC with introduction & implementation of quality grading system  | Medium term (1 -3 years) | Dec 2021 – Dec 2023                               | Sector representing organisations to create a portfolio for the quality grading system                     | ARC<br>SAHTA<br>HJAG<br>HCoP                            | DFFE<br>Living Lands,<br>SANBI,<br>DALRRD,<br>DEDEAT,<br>DEA&DP,<br>CapeNature  | All actors in supply chain understand and use the quality grading system; improvement in consistent supply & quality |
| Develop the environmental component of an   | Medium term (1 -3 years) | Jan 2022 – Dec 2023                               |  |   |   |  |

<sup>27</sup> On clearly demarcated existing/abandoned transformed lands

|  |                          |   |  |   |  |   |
|--|--------------------------|---|--|---|--|---|
| accreditation system <sup>28</sup>   |                          |   |  |   |  |   |
| Implement accreditation system & certification <sup>29</sup>   |                          |   |  |   |  |   |
| <b>Work Package 3.3.</b>   |                          | <b>SUPPORT &amp; IMPLEMENT INCLUSIVE BIODIVERSITY MANAGEMENT PLAN</b> |  |   |  |   |
| <i>Action</i>  | <i>Priority</i>          | <i>Timeframe</i>  | <i>Responsible</i>   | <i>Resources required</i>                               | <i>Collaborations and alignments</i>   | <i>Outcomes</i>   |
| Conduct IUCN Red List <sup>30</sup> national conservation assessments of <i>C. subternata</i> & <i>C. intermedia</i> | Medium term (1 -2 years) | Dec 2021 – Dec 2022   | Sector representing organisations to appoint a dedicated person/committee and create a portfolio for BMP support | Sector association secretariat<br>HCoP<br>SAHTA<br>HJAG | SANBI, experts and conservation agencies; academic institutions, Provincial conservation authorities | Conservation status of <i>C. subternata</i> & <i>C. intermedia</i> is published                       |
| Establish resource monitoring programme to assess impacts of ongoing wild harvesting <sup>31</sup>                   | Medium term (1 -2 years) | Jan 2024 – Jan 2025   |  |   |  | Resource monitoring programme in place  |
| Undertake a resource assessment  | Medium term (1 -2 years) | Jan 2024 – Jan 2026   |  |   |  | Resource assessment for extent and character of <i>C. subternata</i> & <i>C. intermedia</i> completed |

<sup>28</sup> Specifically for the a Honeybush industry certification/assurance scheme

<sup>29</sup> To be done by a recognised industry organisation for harvesters and other industry members

<sup>30</sup> International Union for Conservation of Nature's Red List of Threatened Species

<sup>31</sup> *C. subternata* & *C. intermedia*

|  |                          |   |  |   |  |  |
|--|--------------------------|---|--|---|--|--|
| Identify areas where harvesting could be considered to prevent negative impacts <sup>32</sup>                                | Medium term (1 -2 years) | Jan 2023 – Jan 2024                           | Sector representing organisations to appoint a dedicated person/committee and create a portfolio for BMP support | Sector association secretariat<br>HCoP<br>SAHTA<br>HJAG | SANBI, DEDEAT, DEA&DP, CapeNature  | Updated information is available on sensitive areas and threatened species   |
| Identify sensitive ecosystems, species & areas to be included in decision support  |                          |   |  |   |  | Updated information is available on threatened ecosystems, areas of exceptional & critical biodiversity & Protected Areas    |
| Correlate BMP roll-out plan with sector association to ensure participation of all communities & geographical areas involved | Medium term (1 -2 years) | Sep 2022 – Sep 2024                           | Sector representing organisations to appoint a dedicated person/committee  | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | Responsible Parties of the BMP; Living Lands; ARC; community protocols; UNDRIP | BMP rolled out to all communities & geographical areas involved with <i>C.subternata</i> & <i>C.intermedia</i> <sup>33</sup> |
| Appoint institution(s) to conduct roll-out on grassroots level   | Medium term (1 -3 years) | Jan 2022 – Dec 2023                           |  |   |  |  |
| Manage and monitor impacts on land and species   | Medium term (1 -3 years) | Dec 2022 – Dec 2024                           |  |   |  |  |
| <i>Work Package 3.4.</i>   |                          | SUPPORT SUSTAINABLE WILD HARVESTING PRACTICES |  |   |  |  |

<sup>32</sup> Use provincial/national sensitivity mapping and existing decision-support tools

<sup>33</sup> Some BMP-related actions will have a wider impact on other Cyclopa species, such as an amended permit system

| <i>Action</i>   | <i>Priority</i>          | <i>Timeframe</i>   | <i>Responsible</i>   | <i>Resources required</i>                               | <i>Collaborations and alignments</i>                                       | <i>Outcomes</i>   |
|---|--------------------------|--|--|---|--|---|
| Introduce & obtain participation from all wild harvesters in the use of sustainable wild harvesting practices                     | Medium term (1 -3 years) | Jan 2022 – Dec 2023  | Sector representing organisations to appoint a dedicated person/committee  | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | AGRI SETA (harvesters & experts), DEDEAT, DEA&DP, WCDoA, ARC; Living Lands | All harvesters and communities (incl youth) understand & implement sustainable wild harvesting guidelines                       |
| <b>Work Package 3.5.</b>  |                          | <b>OPTIMALLY UTILISE EXISTING PROCESSING PLANTS</b>                        |  |   |  |   |
| <i>Action</i>   | <i>Priority</i>          | <i>Timeframe</i>   | <i>Responsible</i>   | <i>Resources required</i>                               | <i>Collaborations and alignments</i>                                       | <i>Outcomes</i>   |
| Investigate the current processing plants and its production limits; link smaller producers to utilise existing processing plants | Long term (3 – 5 years)  | Jan 2022 – Jan 2027  | Sector representing organisations to appoint a dedicated person/committee in collaboration with DTIC and DFFE and local government | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | DFFE<br>DTIC   | Functioning aggregator hubs; Smaller producers linked to nearby processing plants; processing plants reaping economies of scale |
| <b>Work Package 3.6.</b>  |                          | <b>LAND RESTORATION TO IMPROVE ECOSYSTEM &amp; CONSERVATION OF SPECIES</b> |  |   |  |   |
| <i>Action</i>   | <i>Priority</i>          | <i>Timeframe</i>   | <i>Responsible</i>   | <i>Resources required</i>                               | <i>Collaborations and alignments</i>                                       | <i>Outcomes</i>   |
| Update and maintain land-use GIS layers useful for the identification for the cultivation of                                      | Ongoing                  | Start Jan 2023   | Sector representing organisations to appoint a dedicated person/committee  | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | WCDoA, DEADP, SANBI  | Status confirmed of transformed land (suitable) as well as virgin land (unsuitable) for the cultivation                         |

|  |         |                   |   |   |  |   |
|--|---------|-------------------|---|---|--|---|
| Honeybush species <sup>34</sup>  |         |                   |   |   |  | of Honeybush species  |
| Promote use of identified existing transformed land for the cultivation of Honeybush species <sup>35</sup>   | Ongoing | Start Apr 2023    | Sector representing organisations to appoint a dedicated person/committee                       | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | DFFE (Biodiversity Economy Strategy Unit), DEDEAT, DEA&DP, WCDoA                 | CBAs <sup>36</sup> & ESAs <sup>37</sup> protected and not used for cultivation  |
| Promote legal and effective alien vegetation clearing through integrated catchment management and monitor Honeybush species recovery after fires; and promote job creation | Ongoing | Start Sept 2023   | Sector representing organisations to create a dedicated portfolio for alien vegetation clearing | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | DFFE, DALRRD, GEF 6, Living Lands, Biocultural community protocols, WCDoA, DEADP | Youth involved in land clearance job creation; less alien vegetation occurrence and less destruction of fynbos; Functioning aggregator hubs; Honeybush and other fynbos cultivated on alien vegetation cleared land |
| Advise Honeybush-bearing landowners <sup>38</sup> to adhere to CARA <sup>39</sup>  | Ongoing | Starting Jan 2022 | Sector representing organisations to create a dedicated   | SAHTA<br>HJAG<br>HCoP                                   | DFFE, DALRRD, GEF 6, Living Lands, Biocultural                                   | Awareness of the impacts of AIS on wild   |

<sup>34</sup> Of existing transformed land (suitable) as well as virgin land (unsuitable) for the cultivation of Honeybush species (focussed on the Honeybush footprint).

<sup>35</sup> In areas previously dedicated to agriculture and forestry but no longer used for these purposes, while avoiding sensitive areas such as CBAs & ESAs

<sup>36</sup> Critical Biodiversity Areas

<sup>37</sup> Ecological Support Areas

<sup>38</sup> i.e. communal, provincial, protected areas, private and municipal

<sup>39</sup> Conservation of Agricultural Resources Act 43 of 1983

|   |                                |   |   |   |  |  |
|---|--------------------------------|---|---|---|--|--|
| Encourage stakeholders to report presence of AIS <sup>40</sup> by logging online project on a platform like iNaturalist |                                |   | portfolio for alien vegetation clearing   | Sector association secretariat                          | community protocols, WCDoA, DEADP  | honeybush created  |
| Promote the involvement of the harvester and local communities in the monitoring and removal of AIS                     | Ongoing                        | Starting Jan 2024   | Sector representing organisations to create a dedicated portfolio for alien vegetation clearing       | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | DFFE, DALRRD, GEF 6, Living Lands, Biocultural community protocols, WCDoA, DEADP | Awareness of the impacts of AIS on wild honeybush created        |
| Undertake gene banking for conservation in areas most likely impacted by climate change <sup>41</sup>                   | Ongoing                        | Starting Jan 2026   | Sector representing organisations to create a dedicated portfolio for conservation and climate change | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | SANBI (MSB) <sup>42</sup> , NPGRC <sup>43</sup> (national genebank), ARC         | Proactive measures in place to mitigate impact of climate change |
| <b>Work Package 3.7.</b>  |                                | <b>SUPPLIER &amp; SKILLS DEVELOPMENT CENTRE OF EXCELLENCE</b> |   |   |  |  |
| <i>Action</i>   | <i>Priority</i>                | <i>Timeframe</i>  | <i>Responsible</i>  | <i>Resources required</i>                               | <i>Collaborations and alignments</i>   | <i>Outcomes</i>  |
| Draft a skills development strategy to drive continuous capacity development  | Short term (6 months – 1 year) | Jan 2022  | Sector representing organisations to create a dedicated portfolio for skills development              | SAHTA<br>HJAG<br>HCoP                                   | AgriSETA   | Continuous capacity development initiatives rolled               |

<sup>40</sup> Alien invasive plant species

<sup>41</sup> Identify 10 suitable collection sites for seed collection

<sup>42</sup> Millennium Seed Bank Partnership

<sup>43</sup> National Plant Genetic Resources Centre of South Africa



|  |                                |                      |  |   |                     |   |
|--|--------------------------------|----------------------|--|---|---------------------|---|
|  |                                |                      |  | Sector association secretariat                          |                     | out in value chain  |
| Conduct training and information sharing workshops for industry, farmers, landowners, field harvesters | Short term (6 months – 1 year) | June 2022 – May 2023 | Sector representing organisations to create a dedicated portfolio for skills development | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | DFFE, SANBI         | EMIs <sup>44</sup> and compliance officers supported training to educate relevant stakeholders on the ecology, sustainable harvesting & compliance with legislation |
| Roll-out of accredited skills training on NQF levels 1 – 4   | Medium term (1 - 3 years)      | June 2022 – Dec 2025 | Sector representing organisations to create a dedicated portfolio for skills development | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | AgriSETA            | Improved skills levels; harvesters, youth and pickers obtained accredited skills  |
| Revise existing information materials  | Short term (6 months – 1 year) | Jan – Dec 2024       | Sector representing organisations to create a dedicated portfolio for skills development | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | WCDoA, DEADP, SANBI | Information material & guidelines inclusive of sustainable harvesting, field guide, ecological review, ecologically sound fire management                           |

<sup>44</sup> Environmental Management Inspectorate

|   |                                |  |   |   |   |   |
|---|--------------------------------|--|---|---|---|---|
| Revise information materials to prioritise the long-term maintenance of the whole ecosystem                         | Medium term (2 – 3 years)      | June – June 2026                         |   |   |   | Revised guidelines distributed to relevant stakeholders (landowners, FPAs <sup>45</sup> , Municipalities. |
| <i>Work Package 3.8.</i>  |                                | <b>MONITOR &amp; TRACEABILITY SYSTEM</b> |   |   |   |   |
| <i>Action</i>   | <i>Priority</i>                | <i>Timeframe</i>                         | <i>Responsible</i>  | <i>Resources required</i>                               | <i>Collaborations and alignments</i>                        | <i>Outcomes</i>   |
| Develop a standardized database of harvesters, harvesting & cultivating farms, landowners, processors <sup>46</sup> | Short term (6 months – 1 year) | Jan – Dec 2022                           | Sector representing organisations to create a dedicated portfolio for data management | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | WCDoA,<br>DEADP, SANBI                                      | Updated and live database available to all stakeholders   |
| Establish a monitoring / traceability system through TOPS <sup>47</sup>   | Short term (6 months – 1 year) | Jan – Dec 2023                           | Sector representing organisations to create a dedicated portfolio for data management | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | WC & EC permitting authorities, DEFF, TRAFFIC <sup>48</sup> | Monitoring & traceability system in place to track the movement of Honeybush throughout the value chain   |
| Standardize the management &  | Ongoing                        | Nov 2021                                 | Sector representing organisations to  | SAHTA<br>HJAG   | Provincial conservation                                     |   |

<sup>45</sup> Fire Protection Associations

<sup>46</sup> Inclusive of other Honeybush stakeholders, EMI's and compliance officers

<sup>47</sup> Inclusive of e-Permit reporting that link total quantities in trade (locally and internationally) and cross check with permit conditions, volumes issued and processing output; and to determine extent of unlawfulness.

<sup>48</sup> TRAFFIC is a leading non-governmental organisation working globally on trade in wild animals and plants in the context of both biodiversity conservation and sustainable development.

|   |  |  |   |                                     |   |  |
|---|--|--|---|-------------------------------------|---|--|
| control measures and actions across the provinces <sup>49</sup> |  |  | appoint a dedicated person/committee and create a portfolio for BMP support | HCoP Sector association secretariat | authorities and DEFF (LACE) <sup>50</sup> |  |
|---|--|--|---|-------------------------------------|---|--|

#### OBJECTIVE 4: SUPPORT RESEARCH & DEVELOPMENT

| OBJECTIVE 4: SUPPORT RESEARCH & DEVELOPMENT   |                                |                                |   |   |  |   |
|---|--------------------------------|--------------------------------|---|---|--|---|
| Work Package 4.1.   |                                | SUPPORT RESEARCH & DEVELOPMENT |   |   |  |   |
| Action  | Priority                       | Timeframe                      | Responsible   | Resources required                                      | Collaborations and alignments                        | Outcomes  |
| List the current research studies and consult with industry stakeholders to draft the research priorities | Short term (6 months - 1 year) | Jan 2022 – Dec 2022            | Sector representing organisations to appoint a dedicated person/committee to the research portfolio | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | Current or past researchers, ARC & academic partners | Research priorities support marketing claims; central Honeybush body of knowledge developed |
| Develop a body of knowledge of all research articles and scientific evidence                              | Ongoing                        | Start Feb 2022                 |   |   |  |   |
| Prioritise and promote research on pollinators, diseases and pests <sup>51</sup>                          | Ongoing                        | Start Jan 2023                 | Sector representing organisations to appoint a dedicated person/committee to the research portfolio | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat | Current or past researchers, ARC & academic partners | The health of the wild and cultivated stocks are looked after                               |

<sup>49</sup> Inclusive of to the harvesting/use/development of Honeybush species across the entire distribution range

<sup>50</sup> Branch Legal, Authorisation, Compliance and Enforcement of the Department of Forestry, Fisheries and Environment

<sup>51</sup> Inclusive of natural and/or invasive pollinators, diseases and pests that either could or are known to impact populations of wild and cultivated Honeybush species

|  |                          |  |   |   |                                      |   |
|--|--------------------------|--|---|---|--------------------------------------|---|
| Consolidate available information on Honeybush genetics and identify priority research to be undertaken (gap analysis) | Ongoing                  | Start Jan 2023                                       | Sector representing organisations to appoint a dedicated person/committee to the research portfolio | SAHTA<br>HJAG<br>HCoP<br>Sector association secretariat             | ARC & academic partners              | Priority genetic research recommended   |
| <b>Work Package 4.2.</b>   |                          | <b>OBTAIN DIFFERENT FUNDING STREAMS</b>              |   |   |                                      |   |
| <i>Action</i>  | <i>Priority</i>          | <i>Timeframe</i>                                     | <i>Responsible</i>  | <i>Resources required</i>   | <i>Collaborations and alignments</i> | <i>Outcomes</i>   |
| Investigate different funding options to support research priorities   | Medium term (1 -2 years) | Jan 2022 – Dec 2022                                  | Sector representing organisations to appoint a dedicated person/committee                           | Sector association secretariat                                      | Current or past researchers          | Funding available for different research studies prioritised by industry  |
| <b>Work Package 4.3.</b>   |                          | <b>LINK RESEARCH WITH GENERIC MARKETING STRATEGY</b> |   |   |                                      |   |
| <i>Action</i>  | <i>Priority</i>          | <i>Timeframe</i>                                     | <i>Responsible</i>  | <i>Resources required</i>   | <i>Collaborations and alignments</i> | <i>Outcomes</i>   |
| Map pathways of how current & suggested research studies will support knowledge gaps & marketing strategy              | Long term (1 – 5 years)  | Jan 2021 – Dec 2027                                  | Sector representing organisations to appoint a dedicated person/committee                           | Sector association secretariat; marketing strategy service provider | SAHTA<br>HJAG<br>HCoP                | Media releases based on scientific evidence; better informed consumer with trust in Honeybush as a healthy lifestyle option |
| <b>Work Package 4.4.</b>   |                          | <b>OBTAIN FUNDING FOR PRODUCT DEVELOPMENT</b>        |   |   |                                      |   |
| <i>Action</i>  | <i>Priority</i>          | <i>Timeframe</i>                                     | <i>Responsible</i>  | <i>Resources required</i>   | <i>Collaborations and alignments</i> | <i>Outcomes</i>   |

|  |                         |                     |   |                       |  |  |
|--|-------------------------|---------------------|---|-----------------------|--|--|
| Analyse current product range offerings and investigate the gap in the domestic & global market for Honeybush products | Long term (1 – 5 years) | Jan 2021 – Dec 2027 | Sector representing organisations to appoint a dedicated person/committee | SAHTA<br>HJAG<br>HCoP | DTIC; Agro-processing;<br>WESGRO <sup>52</sup> | Increased variety of Honeybush product ranges available in retail to suit different consumers' needs |
|--|-------------------------|---------------------|---|-----------------------|--|--|

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<sup>52</sup> The official tourism, trade and investment promotion agency for Cape Town and the Western Cape

## 5. FINANCE STRATEGY

### 5.1. COST ESTIMATIONS

Please see the detailed cost estimation attached in Addendum B, inclusive of the timeframe and responsibility for implementation. The cost estimation was developed in an itemised manner to allow the sector flexibility in implementation and the availability of funding.

Herewith below please see the budget per objective and then per year.

| OBJECTIVES (incl WORK PACKAGES)                 | COST ESTIMATION |
|---|-----------------|
| Objective 1: Strengthen the sector organisation | R740 000,00     |
| Objective 2: Create market demand               | R1 092 000,00   |
| Objective 3: Ensure consistent quality supply   | R1 212 000,00   |
| Objective 4: Support research & development     | R32 000,00      |
| Total   | R3 076 000,00   |

| TOTAL PER ANNUM          |            |         |                          |         |         |
|--------------------------|------------|---------|--------------------------|---------|---------|
| 2021                     | 2022       | 2023    | 2024                     | 2025    | 2026    |
| R488 000                 | R1 784 000 | R48 000 | R416 000                 | R96 000 | R16 000 |
| ONGOING STARTING IN 2022 |            |         | ONGOING STARTING IN 2024 |         |         |
| R572 000                 |            |         | R96 000                  |         |         |

It needs to be noted that the cost estimation was completed in collaboration with informed sector stakeholders, but the estimate will need to be reviewed and detail increased for any formal funding application.

### 5.2. FUNDRAISING / FUNDING

The sector will use this SDP as a baseline document to determine interest from external funders to fund the work packages or actions included here. Due to the structure of both the SDP and the cost estimation, funders can engage with those work packages or actions which are aligned to their funding strategies and objectives.

As detailed in *Section 4.3. Implementation Actions*, one of the key challenges for the sector is to address the sector representation fragmentation and to commence with generic marketing to ensure financial sustainability. As the current levy structure does not generate sufficient income, additional income streams will need to be found until the sector is in such a position to sustain itself through a membership fee or a levy structure. The funding strategy could consider a combination of the below:

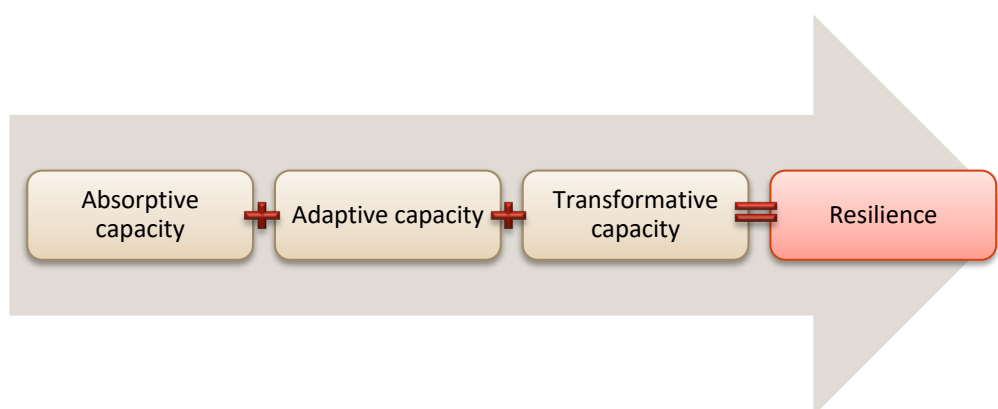
|                             |   |
|-----------------------------|---|
| <i>Voluntary levies</i>     | Voluntary levies are determined by members of an organisation and usually based on volume produced.   |
| <i>Membership fees</i>      | Some organisations charge a set membership fee, usually paid annually. In some cases, the fee is based on categories of membership, depending on the size of the organisation or their level of participation and benefits. Most sector organisations have a membership fee model combined with levies based on volume. |
| <i>External funding</i>     | This can be through national government initiatives or international funding organisations who support sector development.  |
| <i>Member contributions</i> | Not all sector organisations are able to generate levies, membership fees or external funding during their early stages, and may be dependent on direct voluntary contributions from members (monetary or in kind).   |

## 6. MONITORING AND EVALUATION

### 6.1. INTRODUCTION

One of the key aims of the ABioSA programme is to build resilient sectors able to identify challenges or blockages and develop and implement actions to address these challenges to ensure sector growth and internal resilience against outside shocks created by the fast changing environment in which the sector operates.

For this reason, the monitoring and evaluation framework used for the sector development plans, focus on how sectors can innovate and develop to mitigate shocks and build resilience. For sectors to become resilient over time, they need to develop three types of capacities as summarized in the visual below.



The main focus of each type of capacity is summarized below.

|                            |  |
|----------------------------|--|
| <i>Absorptive capacity</i> | Refers to the ability to recognise the need for new and external information and apply it to improve the bioeconomy. This can be built through establishing knowledge products intentionally to cope with stress factors |
|----------------------------|--|

|                                |  |
|--------------------------------|--|
|                                | such as changed market requirements, extreme weather events, economic downturn, lack of access to market intelligence and changes in consumer buying behaviour.  |
| <i>Adaptative capacity</i>     | Refers to making intentional adjustments in anticipation of or in response to change in order to create more flexibility in the future. Intentional changes can include adjusting to new legislation and regulations, as well as to find innovative ways to prevent threatened species used in the bioeconomy from becoming extinct. |
| <i>Transformative capacity</i> | Refers to making intentional changes to stop or reduce the causes of risk, so that risk is not carried by vulnerable communities and businesses involved in the biotrade supply chain. Transformation can include assessing and adjusting supply chains to correct power imbalance.  |

## 6.2. RESPONSIBILITY FOR IMPLEMENTATION

The purpose is to institutionalise the monitoring and evaluation process with the sector's stakeholders as a way to track their progress on sub-sector level; improve learning and innovation opportunities; and uncovering blockages. This process should ideally be driven by the transformed SA Honeybush Tea Association to evaluate the implementation of the Honeybush Sector Development Plan in terms of overall growth in production, national sales and exports; the number of small producers; gender equality and empowerment; and employment. This phase includes the evaluation of the drivers of innovation and the required policy and market environment to upscale the activities in the sector through learning and innovation.

The sector-specific Monitoring & Evaluation Framework for the Honeybush sector is included below.

## 6.3. MONITORING AND EVALUATION FRAMEWORK

The monitoring and evaluation framework includes the following elements as indicated in the tables below:

|                                |  |
|--------------------------------|--|
| <i>Sector challenge</i>        | This is the stress factor, threat or area that needs transformation  |
| <i>Work Package</i>            | This is an indication of the work package where the required change is included  |
| <i>Indicator of success</i>    | This is the action that needs to be implemented to address the stress factor, threat or need for transformation            |
| <i>Sources of verification</i> | This is the proof that the action has been implemented, similar to the outcomes listed in the Implementation actions above |
| <i>Key assumptions or risk</i> | This details assumptions or risks that may be experienced in the implementation of the action to bring about change        |
| <i>Frequency of collection</i> | This is how often progress on the action is checked, i.e., annually, quarterly, monthly, etc.                              |

The sector-specific monitoring & evaluation framework for the Honeybush sector is included below:



### HONEYBUSH SECTOR: ABSORPTIVE CAPACITIES

| SECTOR CHALLENGE   | WP / PRIORITY AREA | INDICATORS OF SUCCESS  | SOURCES OF VERIFICATION OF DATA | KEY ASSUMPTIONS / RISKS | FREQUENCY OF COLLECTION |
|--|--------------------|--|---------------------------------|-------------------------|-------------------------|
| Honeybush consumers are not informed about the different tastes and quality grades | Work Package 2.1.  | Develop and implement a generic marketing strategy   |                                 |                         |                         |
|  |                    | Introduce the different species' tastes to different consumer groups including retailers, exporters and the public |                                 |                         |                         |
| Disconnect between research studies, research priorities and marketing strategy    | Work Package 4.3.  | Provide the different consumer groups with sufficient and ongoing information in order to make an informed choice  |                                 |                         |                         |
|  | Work Package 4.4   | Investigate different funding options to support research priorities.  |                                 |                         |                         |
| Unverified and outdated industry information                                       | Work Package 1.3.  | Obtain funding for secretariat functions such as updating and verifying industry information                       |                                 |                         |                         |
| Low domestic and global market demand  | Work Package 2.4.  | Increase information and access to regional and global trade promotion initiatives                                 |                                 |                         |                         |

### HONEYBUSH SECTOR: ADAPTIVE CAPACITIES

| SECTOR CHALLENGE | WP / PRIORITY AREA | INDICATORS OF SUCCESS | SOURCES OF VERIFICATION OF DATA | KEY ASSUMPTIONS / RISKS | FREQUENCY OF COLLECTION |
|------------------|--------------------|-----------------------|---------------------------------|-------------------------|-------------------------|
|------------------|--------------------|-----------------------|---------------------------------|-------------------------|-------------------------|

|   |                   |  |  |  |  |
|---|-------------------|--|--|--|--|
| Sector not compliant with ABS regulations and currently trading illegally | Work Package 1.4. | Develop a collective industry-wide ABS agreement and draft a step-by-step guide on completing the permit process |  |  |  |
| Incomplete GI registration  | Work Package 2.3. | Plot next steps required to complete GI application in terms of process to move from MMA to APS                  |  |  |  |
| Over-harvesting of wild species threatened with extinction                | Work Package 3.4. | Introduce sustainable wild harvesting practices and obtain participation from all wild harvesters (incl youth).  |  |  |  |
| Inconsistent quality supply   | Work Package 3.2. | Develop context specific cultivation guidelines; Support ARC with introduction and implementation of QGS         |  |  |  |

| HONEYBUSH SECTOR: TRANSFORMATIVE CAPACITIES        |                                 |   |                                 |                         |                         |
|--|---------------------------------|---|---------------------------------|-------------------------|-------------------------|
| SECTOR CHALLENGE                                   | WP / PRIORITY AREA              | INDICATORS OF SUCCESS   | SOURCES OF VERIFICATION OF DATA | KEY ASSUMPTIONS / RISKS | FREQUENCY OF COLLECTION |
| Sector associations not representative of industry | Work Packages 1.1., 1.2, & 1.3. | Honeybush Joint Action Group formed to provide transformation support to the sector association       |                                 |                         |                         |
| Low value chain development                        | Work Package 4.4.               | Analyse current product range offerings and investigate the gap in the market for Honeybush products. |                                 |                         |                         |

|   |                                 |   |  |  |  |
|---|---------------------------------|---|--|--|--|
| Under-utilisation of existing processing plants | Work Package 3.5.               | Determine current processing plant numbers and production capacity, and link smaller producers to use them; promote job creation through functioning aggregator hubs  |  |  |  |
| Lack of access to market                        | Work Packages 2.1., 2.4. & 4.3. | Sector association to actively and continuously implement the actions of the proposed generic marketing strategy to introduce the different species' tastes to different consumer groups, retailers and exporters |  |  |  |

## 7. LIST OF ADDENDUMS

Addendum A: Stakeholder list

Addendum B: Cost estimation

Addendum C: HCoP terms of reference

Addendum D: HJAG terms of reference

Addendum E: Sector-specific Context Analysis (Honeybush, *Aloe ferox*, Buchu)