

Draft Supplementary Report

First National Marula Sector Development Plan Workshop

Date: 2nd July 2019

Venue: CSIR, Pretoria, South Africa

Introduction

The ABioSA project in close collaboration with the Department of Environment, Forestry and Fisheries (DEFF), other partners and sector stakeholders have started the process to establish a Marula Sector Development Plan (SDP).

Generally a SDP could include the following cross cutting issues:

- Sustainable supply, sustainable biodiversity impacts, conservation, capacity of supply and role and impact of domestication and cultivation;
- Current and potential markets, industry and consumer trends;
- Traditional knowledge and Access and Benefit-sharing;
- Science, technology and product and manufacturing innovation;
- Quality, standards, certifications;
- Market access and non-tariff measures, compliance in local, regional and global markets;
- SME development along the value chain, including access to funding and finance; and
- Sector organisation, promotion and communication.

Background

The current Marula industry is supplied from “wild harvested” fruits, as well as from trees that are “tenured” to households blurring the distinction between “wild harvested” supply and “cultivated” supply. This, and other factors, makes it difficult to ascertain the sustainable production capacity for a marula SDP. Further, there are plans to establish plantations of marula trees, whilst some SMEs and organisations claim that fruit from natural stands of marula in Botswana can produce 2 billion kilograms of fruit per annum.

Limited resource surveys are available from a project funded by DfID in the early 2000’s, and new resource surveys are planned in, for example, Mpumalanga Province, South Africa. Capacity of production has also been estimated in North Central Namibia. In the case of wild and tenured marula trees there are concerns that changing patterns of use, and climate change, may be negatively affecting the health of the marula tree resource. Some academic initiatives have provided insights into the resource base, use and impacts, but these are not comprehensive, and different researchers have used varying methodologies, making it difficult to extrapolate quantitative and qualitative information for sector-level planning.

For a coherent SDP to be prepared it is therefore necessary for these issues of sustainable supply to be addressed at an early stage. Additionally, it is important to consider how the development of the marula sector can contribute meaningfully towards biodiversity management, benefit sharing, and possibly also towards climate change adaptation and carbon sequestration.

There is a growing interest to demonstrate that ABS, biotrade and indigenous plant commercialisation leads to biodiversity conservation. For example, BioInnovation Africa seeks to demonstrate that biodiversity-based product innovation, and Access and Benefit-sharing agreements, leads to biodiversity conservation. Similarly, new funds for SMEs in the natural products sector seek as outcomes the management of biodiversity conservation at a landscape, biome, or sub-regional level.

Biodiversity management plans could meaningfully contribute to processes and outcomes that demonstrate achievement of these indicators, and it is therefore strategic for the marula sector to consider how best to ensure, and then demonstrate achievement of these indicators. This suggests a possible use of **biodiversity management plans**, **resource assessments**, and also potentially **biocultural community protocols**, as instruments to support this aspect of a marula sector development plan.

Output from 1st workshop

The focus of the first in a series of workshops held on 2 July 2019 was on marula sustainable supply, use and conservation. In due course, further workshops, seminars, round tables and/or conferences will be defined, planned and implemented to ultimately lead to the marula sector development plan.

The specific purpose of the first workshop was to concentrate more on the sustainable supply, use and conservation.

- Initiate a process to reach a common understanding on the current status of the sustainability of supply of marula, and the establishment baseline information;
- Exchange and document ideas and views about how to ensure sustainable supply and biodiversity conservation;
- Discuss and promote common methodologies for resource assessments, and biodiversity management plans, by individual projects and/or countries so that there is coherence when considering an overarching marula biodiversity management strategy;
- Develop a tentative view of what the current sustainable production capacity of marula fruit is in South Africa and initial ideas regarding the region;
- Identify other key stakeholders relevant to the issues of marula sustainable supply, use and conservation, and propose a plan of action that could lead efficiently to marula sustainability strategy; and
- Propose ideas and identify potential key informants and stakeholders to contribute towards a regional marula sector development plan.

The workshop process is described in the agenda “Purpose and Agenda, Marula workshop on sustainable supply, use and conservation, Tuesday 2nd July 2019” (pages 11 – 12) along with the list of attendees (pages 13 – 15).

Below follows the documentation of the input from the workshop, comprising of the following:

- Workshop expectations of attendees (page 3 of the report);
- Resource assessment and their methodologies capacity of supply; domestication & cultivation (page 4);
- What are the risk to sustainable supply & conservation? What are the weaknesses in the current understanding (page 4);
- What data/documents/information (quantitatively & quality) is required? Where can it be found (pages 5 - 6);

- What would be the objectives and key elements of a sector development plan (pages 6 - 8)
- Who are the actors/stakeholder & projects along the value chain (page 9);
- Who would be key stakeholders to involve in the development of the plan? What would be their function? (page 8 - 9 of this report)
- A set of agreed actions comprising deliverables, who would prepare the deliverable, and a proposed timeframe (page 10).

Participants expectation of the Marula sector development plan workshop

- Marula to become the next rooibos
- Contribution by all stakeholders
- Implementable strategies/plan for the conservation of Marula
- Basic roles & responsibilities of key stakeholders to support the development of the Marula sector plan
- Interact with current interested parties and understand the current dynamics and key players in the sector
- Action plan, timelines, beneficiation (resource owners), sustainability
- Understanding of the sector/industry and understand where to best support
- Marula sector contribution to the livelihoods of people/communities, especially focusing in the rural communities
- A unified and impactful approach of the sustainable development of Marula industry where there is a stronger collaboration between different players along the value chain which will also see the empowerment of grassroots players
- Coordination towards collective increased quantity and quality
- Regional value chains co-operation (business/community)
- Identify areas of collaboration among stakeholder, enhance participation of SMME's along the value chain, map out strategies that will inform Marula sector
- Clearly understand all contribution of all the key stakeholder involved in the Marula value chain
- Avoid regional race to the bottom
- Better understanding of the sector (it is a sector of focus for the GQSP-SA project)
- How the Marula industry keep safety of their products and quality, contribution to the economy, learn about access &benefit sharing
- Develop a sector plan that put conservation (of resources) at the forefront
- Synergies strategies to develop the Marula sector
- Step towards the development of plan that is implementable
- Consolidated Marula sector plan
- Sustainable Development (money/people)
- Marula sector plan that is strong on issues of sustainability of the resources and beneficiation in the context of ABS regulatory measures
- Regional development collaboration
- Roadmap for sustainable use of Marula initiated and outlined for the region

Resource Assessment and their methodologies, capacity of supply, domestication & cultivation

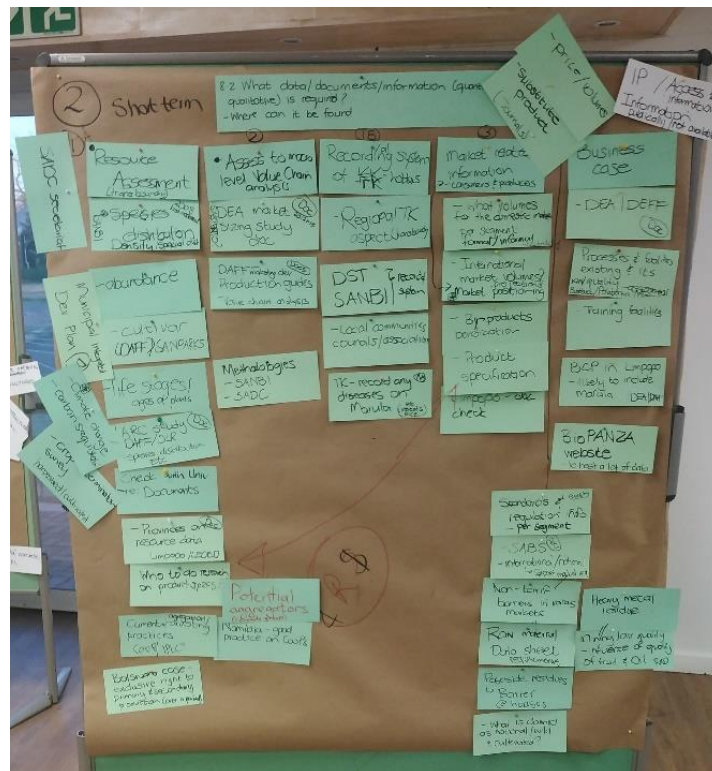
- Restitution land to be used for cultivation. Cultivation for maximum impact (incl. sex of the trees)
- Have a look at the whole spectrum of crops
- Ability of a country to export
- The market requirements
- Market quality and quantity
- Sustainable commercial product
- Research & Development on Marula planted, irrigation & cultivation
- Literature research
- PAN African & possible regional workshop
- Required standards to respond to markets
- Understanding of what the international market requires
- Prioritise/convince to cultivate Marula
- Space & Landscape for cultivation
- Marula in the field for benefit of Agroforestry (wild-harvesting)
- Establishment of resource survey that can be compared over period (SANBI)
- Diversification and exportation
- Downsizing of community supply
- Key questions or agendas
- Marula production fill into existing products
- Uniformity of methodology and difficulty to compare over a period of time
- Integrated approach
- South Africa has a competitive advantage (Technology/capacity to move up the value chain)
- Different levels at value chain regulations
- The standing of government in the Marula development plan
- Medium to long term plan that will feed into BioPANZA
- Sustainable supply of the fruit/tree/oil
- Lessons learnt from Israel

What are the risks to sustainable supply & conservation?

What are the weaknesses in the current understanding?

- Identification of tree sex
- Seasonality risk
- Self-regulation vs regulation
- The period of trees to bear fruits (7 years)
- Lack of quality culture
- SADC quality infrastructure not in place
- IK system not getting it right
- Costs for SMMEs
- Demographic supply
- SADC states signatory to Nagoya
- Emerging settlements in endangering trees
- Legislation- ownership on how to ensure Africa is protected to produce the superfruit/marula
- Marula will only become a superfruit if we get all the blocks for the sector in place

What data/documentation/information is required?



SHORT-TERM ACTIVITIES

1. **Resource Assessment (trans-boundary)** should be conducted, however prior to this taking place it should be agreed as to which methodology shall be used amongst the stakeholders to ensure that apples will be compared with apples (refer to "Resource Assessment and their methodologies, capacity of supply, domestication & cultivation" section at the end of the document for further detail participants thought were important).
 - Density/spatial distribution of marula (SANBI, 2008 last assessed).
 - The resource assessment document should contain the following
 - Abundance
 - Cultivar (DAFF/SANPARKS)
 - Life stages/ages of plants
 - ARC study (DAFF/DLR) e.g. species distribution
 - Climate change, carbon sequestration
 - Crop determination survey (harvested/cultivated)
 - Current harvesting/aggregation practices (Coop/IPLCs)
 - Potential aggregators (community groups)

*The following notes were made as to where some data may be accessed

- Contact provinces on resource data (Limpopo/LEDED)
- Municipality integrated development plan
- Check with universities for documents
- Who does research on product species?
- Botswana case-exclusive right to primary & secondary production
- SADC secretariat

- Namibia- good practice on Coops
- 2. Market related information/positioning** (consumers & producers)
 - What volumes for the domestic market per segment formal/informal?
 - International market volume projections
 - By products beneficiation
 - Product specification

* Check documents from Limpopo/LEDED
 - 3. Access to macro level value chain analysis**
 - DEFF market sizing study (2012/2013)
 - DAFF marketing development production guides (value chained analysis)
 - Methodologies (SANBI, SADC)
 - 4. Recordal system of Traditional Knowledge (TK)**
 - Local communities' councils/association
 - TK record any diseases on Marula (i.e. insects, mice)
 - DST/SANBI recordal system
 - Regional TK aspect (transboundary)

MEDIUM TERM ACTIVITIES

- 5. Tentative Business case**
 - Non-tariff/ barriers in varies market
 - SABS international (export market reg)/national
 - Standards & Quality regulation information per segment
 - Raw material data sheet requirements
 - Pesticide residues (Barrier @ houses)
 - What is claimed as national /wild & cultivated
 - Mining/air quality (influence of quality of fruit & oil, R& D)
 - Heavy metal residue
- 6. Business case**
 - DAFF documents
 - Capture the available process labs & facilities; e.g. KZN/quality assessment (Bushbuck/Phalaborwa/Modimole)
 - Training facilities
 - BCP in Limpopo from DEFF (likely to include Marula)
 - BioPANZA website (to host a lot of data)

What would be the objective ad key elements of a Marula Sector Development plan?

The group agreed on what is defined as short, medium and long term being:

Term	Years	Focus
Short Term	<> 3 years	Action
Medium Term	Between 3 – 5 years	Strategy
Long Term	<> 5 years	Vision

- Sustainable harvesting schemes
- Cultivation
- Of all marula tree “products”

Activities related to the marula SDP

- Market research on product positioning
- Leveraging investments
- List of concrete activities

Elements to consider

- Actors in the value chain
 - Producers/Collectors
 - Producers
 - Users
- Technical supporters
 - Industry association (other)
 - Research technology producers
 - Technical quality infrastructure availability
- Government
 - Department of Trade and Industry
 - Department of Environmental, Forestry and Fishery
 - Department of Science and Technology
 - Government structure at regional level
 - Sub national structures
 - Agriculture rural development land affairs
- Bankable business plans
 - Funding agencies
 - Water utilities
 - Positioning branding
 - Marketing strategy
 - Resource assessment

Stakeholders identified to be involved in the in the development of the plan

Government Departments (National/Provincial/Local)

- Department of Environmental, Forestry and Fisheries (BioPANZA, BABS & Conservation, Forestry section protected trees)
- Provincial government department
- Department of Agriculture, Land Reform and Rural Development (Plant breeders rights national register, SPS, Industrial crops)
- Department of Trade and Industry (Industrial Policy Action Plan)

Government Implementing Agencies

- CSIR
- The Innovation Hub
- Technology Innovation Agency
- South African National Parks
- South Africa Local government association (SALGA), Municipality access
- Companies and Intellectual Property Commission (Companies & IP commission, Patents)
- Small Enterprise Development Agency (SEDA)

- National Agricultural Marketing Council (NAMC)
- Industrial Development Corporation (IDC)
- Development Finance Institution (DFI)

Organisations/Industry association

- Traditional authorities (Access to harvesters & resources)
- Harvesters (communities)
- Land owners
- Commercial farmers
- IK holders
- PhytoTrade, BIZ
- Private sector (SMMEs)
- Industry support organisations
- Certification authorities (GAP certification)
- National economic development planners
- Perishable Products Export Control Board (PPECB)
- South African Bureau of Standards
- Southern African Essential Oil Producers Association
- Oil Processors (crude & refined)
- Entrepreneur & individuals' experts
- Consumer manufacturer e.g. Unilever
- Distell (Amarula) Logistics/Info
- Nurseries (associations)
- Land Banks & Commercial Banks/Insurance

International organisation/government

- Botswana Ministry Environment (Department of Forestry & range resources)
- NFP for SADC countries (Advise on department)
- Poverty alleviation programme (Botswana)
- The Namibian Network of the Cosmetics Industry (NANCI)
- Botswana Bureau of Standards (BOBS)
- SADC countries besides Botswana & Namibia
- SADC secretariat (national focal points)
- Nat Prods Assoc Botswana (NPAB)
- Traders international
- Natural Products Development Trust (Botswana)
- UNIDO/GIZ/SECO

Researchers

- Universities
- South African National Biodiversity Institute
- Agricultural Research Council
- Scientific authority

Of the above stakeholders, further information/initiatives were provided

CSIR

- Research on the conductivity of trees, working on remote sensing technology (high resolution image)
- Working on proposal or special information (impact on climate change and sustainability)

SANBI

- Current status on resource assessment, not yet in discussion with DEA (\pm 3yrs)
- Training as part of the DST national recordable system

Universities

- University of Johannesburg & other research.
- Tshwane University of Technology
- Stellenbosch University

DST

- Recordal system (covering Marula)

ARC

- IPAP database

ABioSA

- Collation of market report (existing)

IDC

- Identification of trees/cultivate & plant superior trees
- Actors looking at sustainable supply of Marula oil
- IPUF-indigenous plant use forum, www.ben-erikvanwyk.com
- Database on indigenous plant use
- Sustainability of communities' study

Next points of action

The deliverables are currently still in preparation and will be reported at the Regional Workshop to be held in Windhoek, Namibia, which is set for 4th and 5th November 2019.

	Deliverables	Responsible Organisation/Person	Timeframe
1	Workshop Report, Prepare pie chart of participant of the workshop/process	ABioSA	18-Jul
2	Engagement/Invite provincial official (Limpopo, Mpumalanga, Kwazulu-Natal, North-West, Gauteng	DEFF	18-Jul
3	Expanded/categorised stakeholder list	ABioSA/ SEAOPA	31-Jul
4	First draft of the potential market segments (IDC with terms, data available)	ABioSA	16-Aug
5	National/ SADC focal points	DEFF (Lactitia)/ABS (Suhel)	16-Aug
6	Literature research (mapping out of who is doing what and where)	Interns	30-Sep
7	Regional Workshop	ABS/ABioSA/ GIZ Namibia	18 Oct? (tbc)
8	Rough Marula sector development plan to developed	TBC	TBC

Annex 1 Agenda

1ST MARULA SECTOR DEVELOPMENT PLAN WORKSHOP Sustainability supply, use and conservation			
For a coherent Marula Sector Development Plan to be prepared it is necessary to first address the question of sustainable supply, use and conservation. Additionally, also to consider how the development of the Marula sector can contribute meaningfully towards biodiversity management, benefit sharing and possibly also towards climate change adaptation and carbon sequestration.			
Date	2 July 2019	Time	8:30 – 17:00
Place	Baobab Room, Building 20, CSIR		
Outcomes of the workshop <ul style="list-style-type: none"> • Exchange ideas, gather data/information to reach a common understanding on the current status of the sustainability of supply of Marula, and initiate the establishment of baseline information; • Identification of additional key stakeholders relevant to Marula sustainability plan, and to a Marula sector development plan • Exchange ideas on the methodologies of resource assessments with the view to future coherence in developing accurate assessments and plans; • Propose ideas and identify potential key informants and stakeholders to contribute towards a Regional Marula Sector Development Plan; • Agree next steps 			
AGENDA			
Time	Agenda Item		
8:30	1	Arrival and Registration Coffee/tea and refreshments served	Participants
9:00	2	Welcome	Preshanthie Naicker, DEA
9:10	3	Participants' introduction & "check-in" - Name, organisation: <ul style="list-style-type: none"> • What is your expectation of the workshop? 	Adrie El Mohamadi, ABioSA
9:40	4	Background of the workshop and overall objectives	Cyril Lombard, ABioSA
10:00	5	Presentation on experience with Biodiversity Management Plans, Resource Assessments; example of Pelargonium, potential relevance to Marula	Neil Crouch, SANBI
10:20	6	Brief report of other participants on their work and interest in sustainable supply and conservation of Marula.	CSIR, Universities, IDC & other participants
11:10	7	Developing a shared understanding of the current status of the sustainable supply and conservation of Marula Reflections on cards (3 key aspects) 1. Resource assessments and their methodologies, capacity of supply; domestication & cultivation	Participants (Metaplan boards)

		<p>2. What are the risks to sustainable supply and conservation, what are the weaknesses in current understanding?</p> <p>3. Projects, actors, stakeholders along the value chain?</p>	
13:00		Lunch	
13:30	8	<p>Towards a sector development plan for Marula (Group work)</p> <p>1. What data/documents/information (quantitative & qualitative) is required, where can it be found?</p> <p>2. What would be the objectives and key elements of such a plan?</p> <p>3. Who would be the key stakeholders to involve in the development of the plan, and what would be their function??</p>	Participants (World Café discussions)
15:00		Working Coffee/Tea break	
15:10	9	Plenary discussion – feedback from group work	All
16:00	10	<p>Identification of plan ahead and a core task team to develop the concept further:</p> <ul style="list-style-type: none"> - Deliverables - Timeframe - Communication channel to broader stakeholder group 	All
16:50	12	Any other business	
17:00	13	End of workshop	

Annex 2 Attendance list

National Marula workshop on sustainable supply, use and conservation 2/07/2019

Please indicate: Training: Non-training:

No	Name & Surnames	Organisation	Email
1	Cyril Lombard	ABioSA (consultant)	newbotanical@hotmail.com
2	Suhel al-Janabi	ABS Capacity Development Initiative	s.aljanabi@geo-media.de
3	Adrie El Mohamadi	ABioSA (GIZ)	adrie.elmohamadi@giz.de
4	Serole Sehona	ABioSA (GIZ)	serole.sehona@giz.de
5	Michel Mallet	CRIAA SA-DC	m.mallet@criaasadc.org
6	Dr Dharmarai Naicker	CSIR	DrNaicker@csir.co.za
7	Dr Moses Cho	CSIR	mcho@csir.co.za
8	Phatheka Mbambiso	CSIR	PMbambiso@csir.co.za
9	Preshanthie Naicker	DEA	PNaicker@environment.gov.za
10	Natalie Feltman	DEA	Nfeltman@environment.gov.za
11	Lactitia Tshitwamulomoni	DEA	LMabadahane@environment.gov.za

12	Phindile Langazane	DEA	PLangazane@environment.gov.za
13	Ntambudzeni Nepfumembe	DEA	nnepfumembe@emvironment.gov.za
14	Bridgette Modiba	DEA	BModiba@environment.gov.za
15	Nomusa Mbuyazi	DEA	Nmbuyazi@environment.gov.za
16	Renira Boodhraj	DEA	RBoodhraj@environment.gov.za
17	Katedi Mantsho	DEA	Kmantsho@environment.gov.za
18	Johan Botha	IDC	JohanB@idc.co.za
19	Daniel Matlhare	IDC	DanielM@idc.co.za
20	Claren Chan	IDC	ClarenC@idc.co.za
21	Pierre du Plessis	SADC	pierre.sadc@gmail.com
22	Karen Swanepoel	SAEOPA	saeopa@gmail.com
23	Neil Crouch	SANBI	n.crouch@sanbi.org.za
24	Avhatakali Netshianane	SANBI	A.Netshianane@sanbi.org.za
25	Tebogo Moila	the dti	TMoila@thedti.gov.za
26	Dr Elsie Meintjies	UNIDO: GQSP	E.MEINTJIES@unido.org

27	Marubini Mutuwa	University of Johannesburg	marubinijessicamutuwa2@gmail.com
28	Leonard Dikobe	Veld Products Research & Development	leon.dikobe@gmail.com
29	Beauila Mathebula	DST	Beauila.mathebula@dst.gov.za
30	Nonhlanhla Halimana	SECO	nonhlanhla.halimana@eda.admin.ch
31	Greg Gordon	CSIR	ggordon@csir.co.za
32	Rasethe Marula	LEDET	RasetheMT@ledet.gov.za
33	Frank Tylor	VPR&D	frank@wildfruitsof africa.com
34	Obakeng Maema	TIA	Obakeng@tia.org.za
35	Farelela Nemudzivhadi	DEFF	FNemudzivhadi@environment.gov.za
36	Thabang Bambo	DST	Thabang.Bambo@dst.gov.za
37	Anna Reyneke	SIPPO	anna.reyneke@sippo.co.za
38	Dr Wilfred Mbeng	University of Mpumalanga	Wilfred.Mbeng@ump.ac.za