



Day 1: Market access cluster session
18 September 2025

Species sector-wide review findings
Enterprise pipeline management tool presentation and workshop



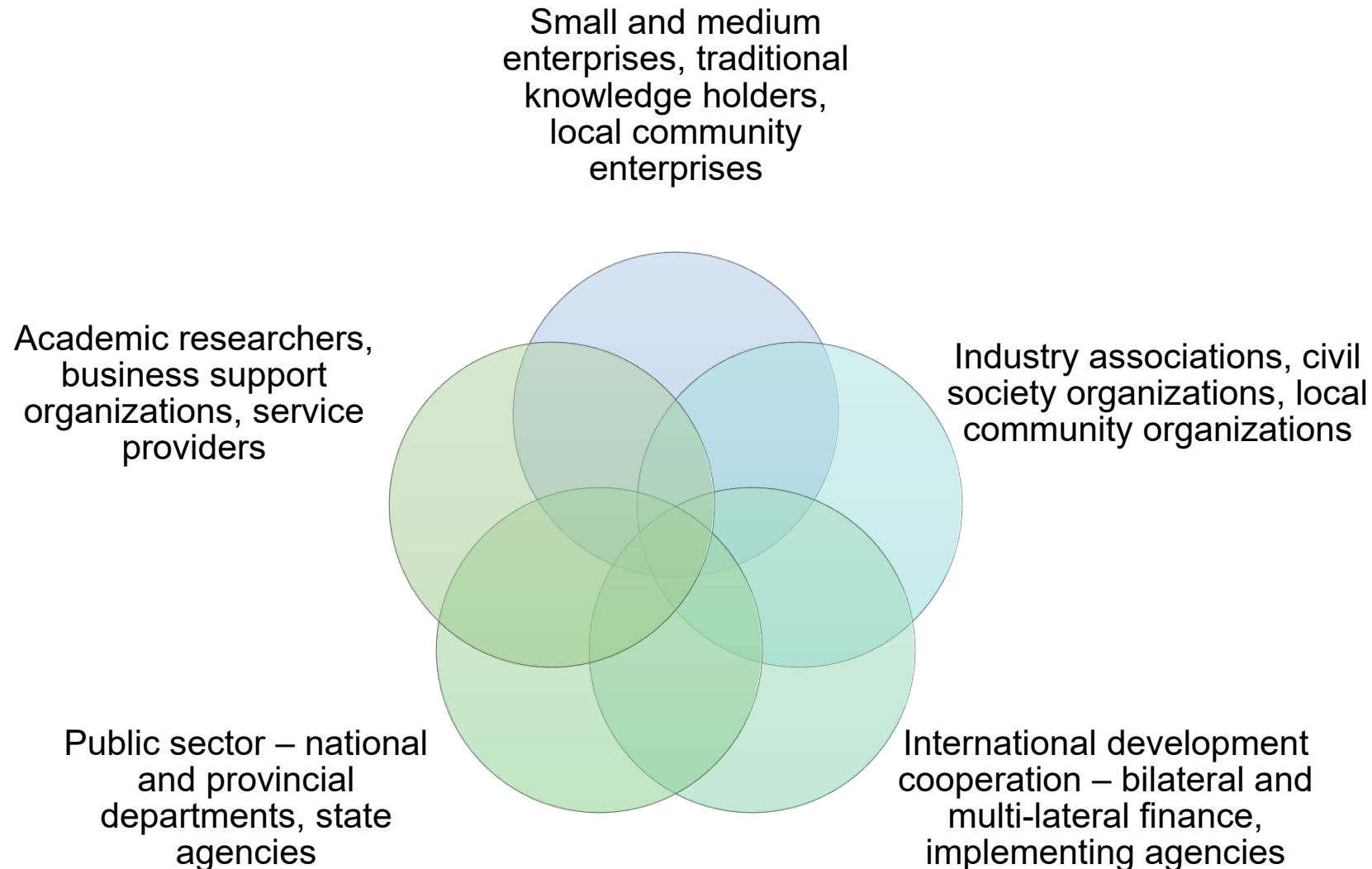


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Species sector-wide review findings



'Sector-wide' – what does this mean?



Sector Development Pillars

ABioSA Framework (2020, revised in 2025)



Quality and Competitiveness



Market Access and Promotion



Conservation and Sustainable Supply



Research and Innovation



Traditional Knowledge and Communities



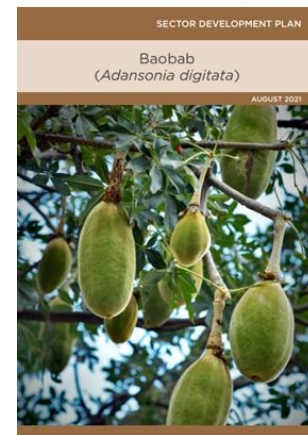
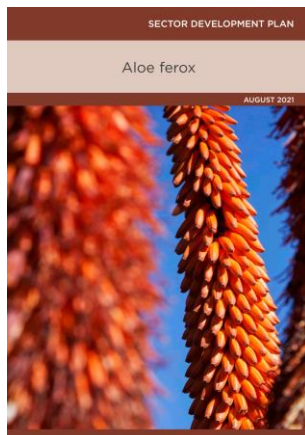
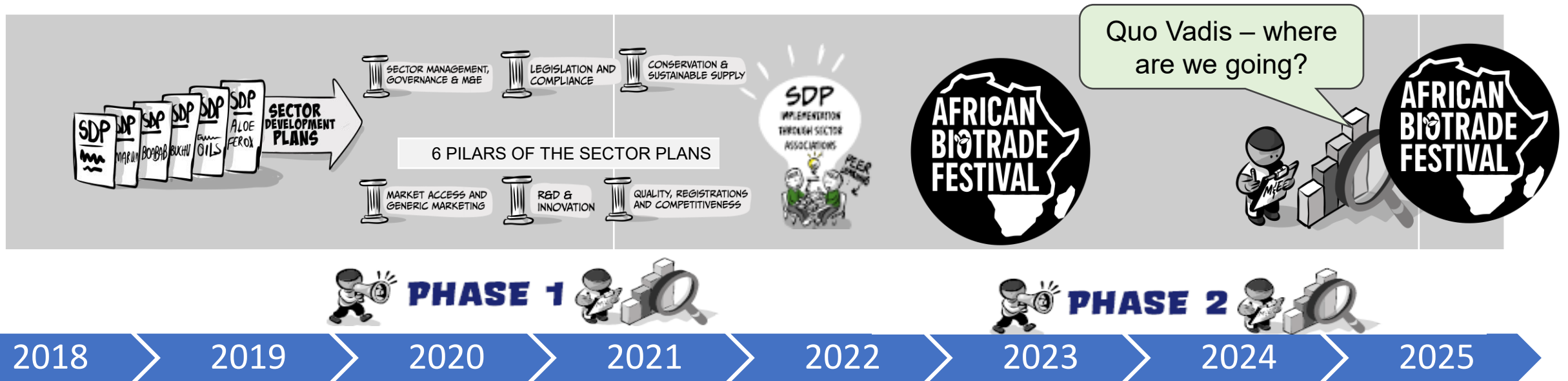
Legislation and Compliance



Governance and Institutions

Which of these pillars is most difficult for SMEs to achieve on their own?

Species Sector Development Plans



Highlights



Institutional Development and Governance

- **Buchu Association**, South African Honeybush Tea Association (**SAHTA**), African Baobab Alliance (**ABA**), Southern African Essential Oils Producers' Association (**SAEOPA**), and Southern African Botanical Products Association (**SABPA**) all **strengthened secretariats, adopted policies, and improved member services.**
- **Membership bases expanded:** Honeybush (63 members), Baobab Alliance (88 members, including Francophone Africa), SABPA (25+ members), and SAEOPA (190+ members).



Access and Benefit-Sharing (ABS) and Traditional Knowledge (TK)

- Buchu Association concluded an **industry-wide Benefit Sharing Agreement.**
- Honeybush and SABPA advanced draft agreements with the National Khoi and San Council (NKC) and the San Council of South Africa (SCSA).
- ABS support projects done with SAEOPA members assisted more than **20 small and medium-sized enterprises (SMEs) with permits, toolkits, and training.**

Highlights



Quality and Standards

- South African National **Standard (SANS) for Marula oil for cosmetics.**
- SABPA **validated analytical methods** (adopted by two laboratories) and developed a draft Code of Practice and Quality Seal.
- Botanicals – Trusted and Authenticated Fingerprinting (**b-TAF**) tested 131 marula and baobab oil samples (95% authentication accuracy) and launched a public verification platform.
- Indigenous Essential Oils industry supported through the establishment of accredited laboratory capacity (3 labs)



Market Access and Promotion

- New or revised websites, Social media platforms, and videos (e.g., “Know Your Buchu”, “Sustainable Harvesting”) boosted visibility of the sector.
- Participation in the African Biotrade Festival in 2023, and again in 2025 combined with Natural & Organics
- Associations attended international tradeshow
- Honeybush advanced in realizing benefits of EU Geographical Indication registration and Marula advanced a regional Geographical Indication action plan.

Highlights



Research, Development and Innovation

- South African Medical Research Council (SAMRC) leading first clinical trial of baobab, protocol published in *PLOS One*, training two postdoctoral fellows.
- SABPA advanced Sceletium alkaloid research; hosted an international symposium.
- Buchu Association compiled a research database of 186 peer-reviewed articles.



Sustainable Supply and Community Empowerment

- Honeybush trained ~45 harvesters in sustainable harvesting and Biodiversity Management Practices and developed a harvester empowerment proposal.
- SABPA established 30,000 Sceletium plants supporting 60 growers, with potential to reach 120.
- Baobab sector reported 86% of enterprises using trained harvesters and initiated a pan-African resource monitoring consortium.



Sectoral Collaboration

- Associations deepened peer linkages; also with other stakeholders, traditional knowledge holders and international peers
 - Regional cooperation advanced toward unified species, or product strategies (e.g. Baobab, Marula)
 - Business support organisations such as SAMRC and b-TAF acted as innovation multipliers, strengthening compliance systems, scientific credibility, and data platforms.
- ✨ Seeing the development of biodiversity-based industries from fragmented and disconnected structures toward a **credible, compliant, and evidence-based sector**

Lessons learnt and Focus for the Future

ABS and TK Engagement: critical progress made but bottlenecks remain

- Sector-wide BSAs concluded or advanced (Buchu, Honeybush, Sceletium), but implementation is slow and relationships take time to develop
- Industry engagement with traditional knowledge holders outside of negotiations enables better understanding
- ABS permitting processes remain complex because of the specifics of each industry, value chain, user, access provider, or traditional knowledge holder involved in the process

ABS is an ***ongoing institutional responsibility***, requiring structured support, and not a once-off deliverable

From Quality Foundations to Market Competitiveness

- Have the foundations of credibility through standards, authenticity tools and scientific validation to raise consumer confidence
- Generic marketing improved awareness, but visibility $\neq$ sales
- Small industries with indigenous biological resources need to grow domestic markets while expanding exports

Convert: credibility + visibility  competitiveness

Sustainable Supply and Landscapes

- Wild-harvest remains critical to sustainable supply and landscape conservation
- Harvesters/cooperatives need empowerment, accreditation, and inclusion.
- Resource monitoring inconsistent across species and countries; stronger ecological baselines required.

Adopt **landscape and whole-of-society approaches** – to support strategies that balance biodiversity, livelihoods, and trade

SMEs: Innovative and resourceful, but vulnerable

- SMEs launched new products and accessed niche export markets.
- Success stories came where SMEs received *step-by-step compliance support* through associations or projects.
- Without structured support, high compliance costs threaten survival

Support needs: Blended finance (combination of different instruments), partnerships and collective approaches

Institutional Maturity vs. Sustainability

- Some associations (Buchu, Baobab, SABPA, ABA, SAEOPA) have reached “*established*” or “*growing*” stages, while others (Aloe ferox, parts of Marula) remain fragmented.
- Strong secretariats with clear governance = purpose, resilience and credibility; and improvement in collective efforts for members
- But financial sustainability of industry associations remains weak – relying on donor funding and limited member contribution
- Cross-sector and industry collaboration highly valued

Need sustainable financing models for industry institutions, including cross sector collaboration strategy on common priorities

In conclusion...

- **Markets reward quality, authenticity, and credibility**, not visibility alone
- **Compliance is essential** but costly —viable with **collective support**
- SMEs are the innovators but remain vulnerable without **structured support**
- **Sustainability, traditional knowledge and community inclusion** are non-negotiable for **legitimacy**
- Industry associations need to work towards **financially sustainability**
- Partnerships at national, regional and global level can **multiply impact**



Thank you for your attention

Special recognition is given to ABioSA who funded the species sector-wide review
Kruger Swart Associates was contracted to conduct the review

