



Day 2: Regional biotrade collaboration – Marula value chain

10:30 – 13:30, 19 September, 2025

Growing Southern Africa's Marula Industry through regional collaboration, sector development planning, geographical indication advancements, and market access with EU Novel Food application



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Sector development plan update and regional collaboration

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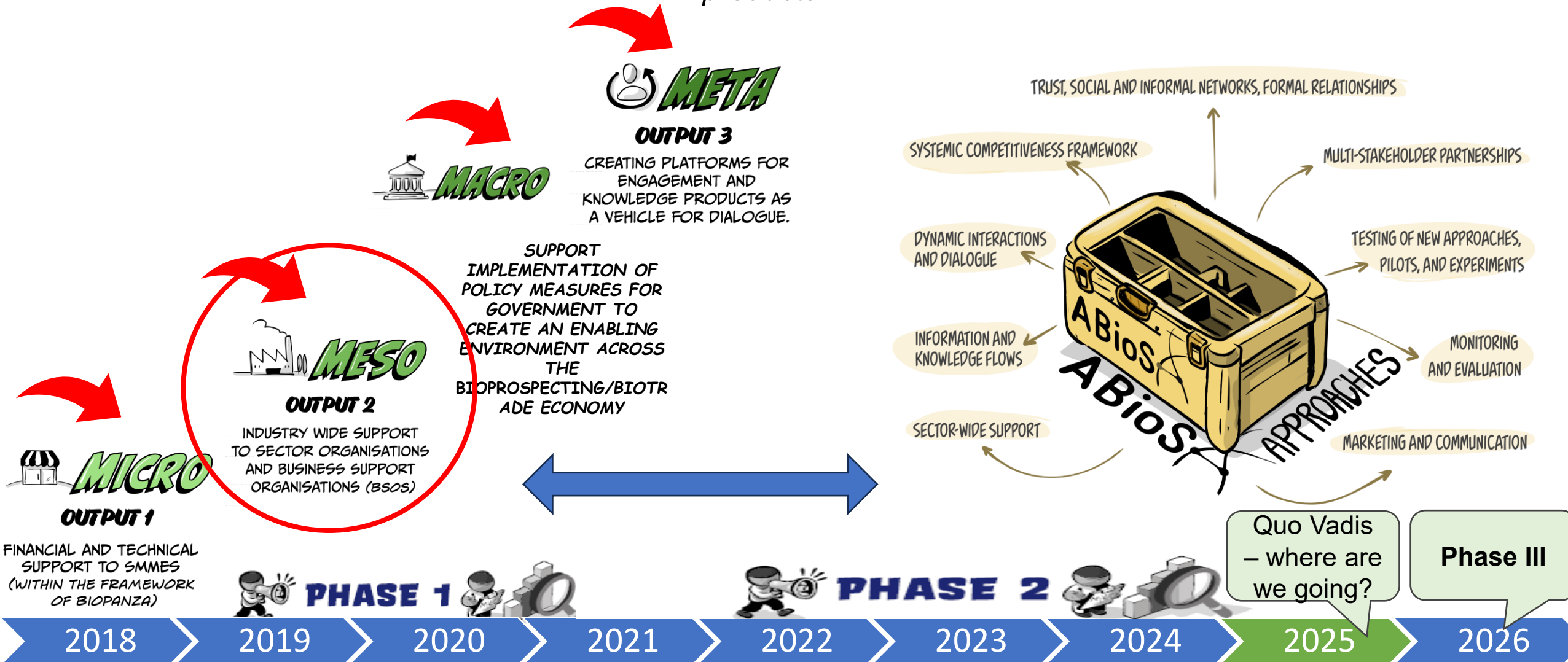
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ABIOSA PHASE II

Support the development of a resilient gender-responsive ABS-compliant southern African biotrade sector, through a systemic competitiveness approach to increase market access for value-added natural ingredients and products.



Marula Sector Development Plan

SECTOR DEVELOPMENT PLAN

Marula
(*Sclerocarya birrea*)

AUGUST 2021



- Developed in 2021, belongs to the marula value chain actors, supportive instrument for regional collaboration.
- Living document, provides a roadmap to guide the development of the sector.
- Strategic objectives, actions related to the implementation, identifies responsible persons or organizations, sets timelines, cost and a monitoring strategy.



SECTOR MANAGEMENT,
GOVERNANCE & M&E



LEGISLATION AND
COMPLIANCE



CONSERVATION &
SUSTAINABLE SUPPLY



MARKET ACCESS AND
GENERIC MARKETING



R&D &
INNOVATION



QUALITY, REGISTRATIONS
AND COMPETITIVENESS



TRADITIONAL KNOWLEDGE
AND COMMUNITY

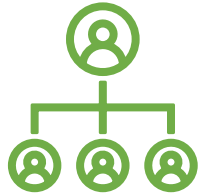
Objectives &
actions in all 6
pillars

Progress on Marula Sector Development Plan



Objective 1:

Formalizing and strengthening the organization



Highlights:

- Marula chamber with active membership, regular communication exist
- SAEOPA secretariat of marula chamber

Low lights



- No formal marula alliance exists
- Governance and institutional aspects such as steering committee etc not present.



Objective 2:

Increased Market Access (Quality & Protection,)



Highlights:

- Oil quality standard finalized (GQSP & SABS)
- Training of value chain actors – GQSP and Precision Oils
- Launch of Botanicals Trusted and Authenticated Fingerprinting (<https://b-taf.org/>) Precision Oil and ABioSA
- Feasibility of Marula Geographical Indicator – SSAIP

Where next?



- Full industry adoption and implementation of the quality standards
- Options and commitments for a Marula GI

Progress on Marula Sector Development Plan



Low lights



- Funding requirements to finalize the application
- Finalize establishment of an FBO – MFPA



Low lights



- Marketing strategy and promotion platforms still need to be developed
- Lack of central holder for abundance of literature and information

Objective 2:

Increased Market Access
(Novel Food registration)



Highlights:

- Substances of Concern study finalized
- Steps for establishing a Marula Fruit Products Association underway

Objective 2:

Increased Market Access
(Generic Marketing)



Highlights:

- Industry information from members is being collected by SAEOPA
- Other stakeholders collect data
- MFPA website

Progress on Marula Sector Development Plan



Objective 3:
Sustainable Management of Marula



Preliminary steps



- ABioSA worked with SANBI to develop methodology for resource assessment - 1 report is available.
- Resource assessment has been conducted by Bioinnovation in Zimbabwe

- No resource assessment has been undertaken - funding and procurement challenges
- No standardized resource monitoring and reporting in marula producing countries



R&D & INNOVATION



QUALITY, REGISTRATIONS AND COMPETITIVENESS

Low lights

Objective 4:
Improve Quality of Marula Products



Highlights:



- SAEOPA database on marula research exists – public vs members
- Novel identified as a research priority
- Tshwane University of Tech & Said Research Ltd for Novel Foods application

- Do other associations have own research databases?
- Coherence with databases



Progress on Marula Sector Development Plan



Low lights



Objective:5
Improve Producers' Compliance



Highlights



- 2023 – Marula Indaba presentations on permitting compliance, harvesting
- Training and workshops on ABSBS – BIA and DFFE partnership

- TK not identified
- No community protocol created
- Lack of harvesting guidelines, SAEOPA members producing marula apply their own best practices

b-TAF: Botanicals Trusted and Authenticated Fingerprinting

[Test your sample](#)

The b-TAF project, funded by POL-ABIOSA, is a pioneering initiative dedicated to combating oil adulteration in the indigenous oil industry.



What comes next – following the progress review

- Finalisation of the Marula Sector Development Plan review
- Prioritisation by the sector on the areas that would like to put forward for implementation either
- Formalisation of marula chamber structure
- Preparation towards funding opportunities - call for proposal for ABioSA phase III
- Call for proposal to be issued early next year, to be assessed against:
 - Finance and structure (governance) criteria - co-investment
 - Representation criteria – sector wide initiatives
 - Legal criteria (commercial suitability and eligibility check)
 - Target group - private sector associations, cooperatives or collaborative models such as hubs, outgrowers and aggregators; public and private BSOs such as universities, laboratories etc



Thank you for your attention



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