

**Draft minutes of the 25th Biotrade Stakeholders' Forum
Meeting (on-line)**

24 June 2025, 10:00-12:00

**Topic: Quality Requirements for essential and vegetable oils as ingredients for
value-added products – the buyers speak**

1. Virtual Arrival

2. Welcome, purpose of meeting and approval of draft agenda

Ms. Pri Elamthuruthil, GQSP-SA II Project Administrator, welcomed the 93 participants who had joined the meeting already to the 25th Biotrade Stakeholders' Forum meeting and expressed gratitude for everyone's participation, especially the panelists and biotrade stakeholders dedicated to sustainable and quality production of indigenous essential and vegetable oils in South Africa.

Ms. Elamthuruthil noted that the purpose of the meeting is to:

- discuss quality requirements for essential and vegetable oils used as ingredients in value-added products
- address the growing global demand for natural, authentic ingredients by emphasizing the importance of quality assurance to meet market needs, build trust, ensure safety, and support sustainable livelihoods.

The draft agenda was adopted (Proposer: Karen Swanepoel/Seconder: Elsie Meintjies)

3. Minutes of the 24th Biotrade Stakeholders' Forum meeting held on 20th February 2024

The minutes of the 24th Biotrade Stakeholder's Forum Meeting were presented and adopted. (Proposer: Margaret Tsuses/Seconder: Karen Swanepoel)

4. Matters Arising

Feedback on the IPD mission: report was never shared.

5. Panel discussion

Dr. Elsie Meintjies, GQSP-SA II, Chief Technical Advisor, welcomed everyone to the meeting, noting it was the largest turnout the forum had ever had and celebrated the 25th meeting of the Biotrade Stakeholders' Forum. Dr. Meintjies highlighted that this occasion was special because the forum had expanded from being focused on the public sector and recently opened to the private sector as well.

6 panelists had been identified to discuss aspects of the theme of the meeting. The biographies of each of the panelists had been circulated.

Prof David Katerere, Tshwane University of Technology

Dr. Meintjies and Professor David Katerere discussed the quality requirements and market demands of the nutraceutical industry. Professor Katerere shared insights on the quality requirements, challenges with essential/vegetable oils that producers face, and how they could incorporate those oils in product formulation.

1. Importance of Quality and Compliance:

- Producers face challenges in meeting quality standards for essential and vegetable oils intended for nutraceutical products.
- Issues often originate from the very beginning, starting with the seed or raw material source.

2. Seed and Raw Material Sourcing:

- Proper seed selection and traceability are crucial—whether cultivated or wild-harvested.
- Traceability ensures sustainability and quality assurance.

3. Agricultural and Collection Practices (GACP):

- Good Agricultural and Collection Practices are vital, including:
 - Using registered and appropriate seeds.
 - Managing pest control with registered pesticides or organic methods.
 - Avoiding contamination with heavy metals from soil or environmental pollution, such as traffic fumes.

4. Hygiene and Safety Concerns:

- There is a general lack of awareness regarding plant hygiene, which impacts residue levels and overall safety.
- Proper hygiene at the plant and extract levels is essential to meet quality standards.

5. Market Awareness and Design Thinking:

- Understanding market needs and consumer expectations is important for compliance and product development.
- Producers need to align their practices with market demands and regulatory requirements.

6. Summary:

- Overall, the challenges in meeting quality standards stem from source material selection, farming practices, contamination risks, and awareness of hygiene practices—these all need to be addressed to improve compliance and product quality.
- He also highlighted the importance of local and domestic markets before going international.

Mr Wilhelm Coetsee, L'Oréal

Dr. Meintjies engaged Wilhelm Coetsee, now with L'Oreal, on his perspective as a manufacturer, buyer, and exporter of vegetable oils. She asked about the key quality requirements of oils and the documentation needed to satisfy the buyer's requirements. Wilhelm emphasized four basic tenets: quality, price, service, and ease of doing business. He highlighted that buyers seek objective standards to measure purity and comparability to market prices and look for accredited third-party laboratory testing to ensure the sample accurately represents the contents in the exported drums of oils, emphasizing the common challenges South African producers face in meeting this need. Further, he touched on the importance of export and hygiene permits, ensuring company registration, regulatory framework compliance. He agreed with the importance of volume but emphasized the initial focus on quality and urged considering domestic vs international markets for the South African market.

1. **Criteria for Quality:**
 - The key quality requirements include product purity, authenticity, and compliance with standards.
 - Products should be tested by accredited third-party laboratories to ensure they match all quality specifications.
2. **Documentation Needed:**
 - Export permits, hygiene permits, GMP certification (if applicable), and regulatory compliance documents.
 - Proper registration and regulatory adherence, including bio-prospecting regulations for indigenous oils, are essential to avoid delays and reputational damage.
3. **Volumetric Capabilities and Quality Focus:**
 - While volume is important, quality is the primary factor for both domestic and international competitiveness.
 - South Africa's market is often underestimated; even small volumes can be attractive domestically and easier to access than larger international markets.
4. **South Africa's Potential:**
 - The country is well-placed in producing indigenous and exotic oils (like marula, manketti, Kalahari melon) that can differentiate products globally.
 - There is increasing international demand for sustainably produced oils with a lower carbon footprint, benefiting local producers.
5. **Role of Distributors:**
 - Well-established distributors in South Africa already have the infrastructure, access to accredited labs, and relationships for international trade.
 - Collaborating with these distributors can ease logistics and quality compliance, helping producers grow and improve their products.
6. **Industry Outlook:**
 - The industry is seeing a positive push with international and local companies interested in South African oils.
 - Wilhelm emphasized the importance of a supportive ecosystem, with the quote "a rising tide lifts all ships," underscoring collective growth.

Mr Matthew Aiken, Managing Director, Essencia

Dr. Meintjies discussed with Matthew Aiden from Essencia about his role as a buyer and supplier of essential and carrier oils. She asked about his approach to oil quality, considering Essencia buys from producers, repackages, and then resells to third-party buyers. Matthew highlighted the importance of understanding the end user's needs and the reliance on the Certificate of Analysis (COA). Key aspects include color and odor profile as crucial elements for clients, especially in the cosmetics industry, and that expectations need to match. They agreed that a product is different from other products if it's grown from a different seed stock. He highlighted the importance of odor profiles and how this is often underrated.

1. **Essencia's Role and Quality Focus:** Essencia has one of the largest ranges of essential and carrier oils in Africa, emphasizing high quality at affordable prices. They buy oils from producers, repackage, and then sell to other buyers, balancing quality requirements at each stage.
2. **Quality Control and Buyer Requirements:**
 - As a buyer, Essencia prioritizes quality, ensuring oils meet specific standards.
 - When reselling, they must also meet their customers' expectations, especially regarding key quality traits.

3. **Importance of Certificates of Analysis (COA):**
 - COAs are critical, detailing characteristics like color, odor, and profile, and are the primary basis for quality assessment.
 - Mismatched color or odor profiles often lead to product returns, highlighting their importance in quality control.
4. **Variability in Natural Products:**
 - Even with the same botanical name, oils can vary in color and odor due to different growing conditions and sources.
 - Controlling these natural variations is challenging but essential.
5. **Odor Profile and Perfumery Skills:**
 - Odor profile is a key quality attribute, especially in cosmetics.
 - Matthew emphasized the underrated importance of smell and shared his experience studying perfumery in France, where human noses are used to assess oils' quality instead of solely relying on documents.
6. **Differentiating Roles:**
 - Matthew is more critical when buying, asking detailed questions upfront about botanical names and specifics to ensure quality.
 - When acting as a seller, the focus shifts to meeting buyer expectations.
7. **Importance of Botanical Names:**
 - Clear botanical identification is vital for ensuring consistency and quality, especially when developing national standards with the South African Bureau of Standards (SABS). Common names can be ambiguous, so scientific names are preferred for clarity.

Ms Mariette van Rooyen, Export Council Manager, CECOSA

Dr. Meintjies asked Mariette van Rooyen, the Executive director of the Cosmetic Export Council of South Africa (CECOSA), about the reputation of South African-produced essential and vegetable oils which are included in finished cosmetic products. Mariette emphasized CECOSA's role in growing exports of both finished products and natural ingredients, as well as the value of trade shows, with support of international and trade shows. She highlighted the importance of South Africa's biodiversity and storytelling. Also, she spoke on the opportunity to connect and share a message through storytelling with buyers. She suggested attending trade shows as a visitor could be beneficial. She also mentioned China as a potential market.

1. **Role of CECOSA:** As the Cosmetic Export Council of South Africa, they work in partnership with government to promote exports of both finished cosmetic products and natural ingredients, mainly focusing on emerging exporters with limited experience in international markets.
2. **Trade Shows and Market Access:** They organize participation in trade shows worldwide, including Istanbul, Hong Kong, Amsterdam, China, London, and Las Vegas helping companies showcase their products and gaining market intelligence.
3. **Product Reputation & Market Insights:**
 - South African oils are viewed as “exotic” and niche, especially in small quantities for high-end or niche markets.
 - The region’s biodiversity and storytelling—highlighting unique attributes like being the third most biodiverse country—are key selling points.
4. **Storytelling & Branding:**
 - Emphasizing stories around South Africa’s biodiversity and unique oils (e.g., marula, moringa) is crucial in engaging buyers.
5. **Market Diversification & Collaboration:**
 - Producers should diversify their ingredient portfolios to simplify export logistics and

- improve market entry.
- Collaboration among producers is encouraged to strengthen export opportunities.
- 6. Opportunities in International Markets:**
 - China shows strong potential, exemplified by successful appearances at events like the China-Africa Expo, where South African products, including oils like baobab, are gaining recognition.
 - Public exposure, such as consumers trying oils directly, increases market interest and curiosity.
- 7. Upcoming Plans:**
 - CECOSA is preparing for upcoming trade shows, including Cosmoprof in Las Vegas and further engagements in London.
 - There is optimism about expanding the awareness and reputation of South African oils internationally.
- 8. Pride in South African oils:**
 - The enthusiasm and pride in South African locally produced oils are growing, supported by strategic participation in global trade shows and effective storytelling to highlight their uniqueness.

Ms Antoinette Goosen, Moodsense Perfumes

Dr. Meintjies moved on to the expert perfumer, Antoinette Goosen, to discuss intuitive fragrances and the quality of ingredients used in perfume crafting. Antoinette emphasized relearning from plants and understanding their chemical constituents to create desired effects. She described her approach to meeting clients' needs through fragrance, promising quality, and ensuring accurate chemo types. She highlighted the importance of ingredients having the correct chemo types and knowing what constituents are in the oils. She values information on where the plants come from and the benefit of having more information on the product being sold.

- 1. Assessment of Ingredient Quality:**
 - As a perfumer working with natural ingredients, she emphasizes the importance of sourcing high-quality, pure, and authentic plant oils.
 - The quality assurance involves knowing the chemotype and chemical constituents to ensure consistency and desired effects.
- 2. Consistency and Trust:**
 - Consistent quality is crucial for maintaining her reputation and delivering reliable sensory experience to clients.
 - Variability between suppliers can be disappointing and affect the product's integrity and client experience.
- 3. Holistic and Intuitive Approach:**
 - Her approach considers the plants' chemical makeup and their emotional and spiritual effects, which influence the formulation.
 - She believes that ingredients should be measurable and deliver real, quantifiable benefits.
- 4. Storytelling and Cultural Context:**
 - She highlights the importance of understanding and sharing the plant's backstory, including traditional uses and indigenous knowledge.
 - This storytelling enriches the product meaning and connects consumers to the deeper, holistic properties of the plants beyond just their chemistries.
- 5. Holistic View of Plants:**
 - Plants are seen as more than chemical sources; they have spiritual and etheric qualities that impact emotional and mental well-being.
 - Incorporating this perspective can enhance the effectiveness and authenticity of

natural products.

Mr Charles Bryant, Disteller, Six Dogs Distillery

Dr. Meintjies engaged with Charles Bryant, a master distiller and the owner of Six Dogs Distillery, to discuss his unique gin production. Charles described their process of using plant material, particularly a blue pea for colour and rose pelargonium to flavor the gin, resulting in a green gin that becomes blue when mixed with the blue pea. Also, he mentioned it's a story about building a brand over the past 10 years. He expressed excitement about the potential opportunity to pivot into the perfume market, noting they could partner with US suppliers and that there is potential to develop exciting things.

1. Distinctive Product and Process:

- His company produces a unique blue gin called "6 Dogs," which features a special process involving local and imported plant materials.
- The gin's color change results from using whole plant materials like rose pelargonium, which is soaked to remove chlorophyll, then combined with blue pea flower to produce a vibrant blue color.

2. Use of Plant Material:

- The plant material, especially rose pelargonium, is critical and limited in supply.
- Quality depends heavily on the correct plant chemotype and fresh, high-quality raw material.
- Trust in sensory evaluation (nose) is important for selecting the right plant batches.

3. Brand Story and Market Success:

- The brand is built around the story of the farm, the six dogs, and the unique process, which has helped penetrate South African retail and export to 30 countries.
- Building a strong brand story is a key factor behind their market success.

4. Opportunity for Diversification:

- The strong brand and existing export platform open opportunities to venture into cosmetics, perfumes, or scented products.
- Charles sees potential to pivot into products like rose geranium-based perfumes or ingredients for skincare, leveraging their brand and social media following.

5. Collaborative Opportunities:

- There is a strategic opportunity to collaborate with perfumers or cosmetic development experts.
- Charles is interested in partnerships to expand into perfume and cosmetic markets, capitalizing on their existing brand and product legacy.

Q & A discussion

The Q & A discussion centered on the challenges faced by local South African oil producers in achieving desired prices. Key themes included:

- **Price Benchmarking:** Identifying resources and methodologies for determining fair market prices. Local producers struggle to get the prices they want for their oil, and there's skepticism as to why buyers aren't willing to pay those prices. Wilhelm explained that benchmarking prices involves understanding both local and international market ranges, which depend on factors like volume, quality, and certifications. Premium products with organic or fair-trade certifications fetch higher prices but are usually purchased in smaller volumes. Resources like industry contacts and the CBI EU website can assist producers in benchmarking prices and understanding market value. It was suggested that a document or resource be developed by

SAEOPA to help producers better understand pricing benchmarks.

- **Value Addition:** Highlighting opportunities and factors to elevate the value of South African products, such as high-value extraction like supercritical CO₂ extraction, which significantly increases the value of oils—up to 20 times higher for high-quality oils.
- **Focus on High-Value Oils:** The emphasis is on extracting high-value oils rather than exporting raw or lower-value products.
- **Aggregating Supplies:** To meet large market demand, it's important to organize producers into aggregators rather than cooperatives, ensuring larger volumes for export.
- **Market Strategy:** The domestic market is very loyal and stable. Building strong local brands can serve as a foundation for entering international markets. Relying solely on exports can be risky due to geopolitical issues or market disruptions, so developing a solid home market is crucial for stability.
- **Collaboration:** Emphasizing the need for producers to work together and to aggregate supplies and opportunities.

David Katerere's key message was to focus on building strong brands in the **home market** first before pursuing international exports. He emphasized that the domestic market is the most loyal and a good place to start and grow.

Wilhelm Coetsee's overarching message was that the South African industry needs to **focus on quality and collaboration**. He used the example of the marula industry, which is suffering from a market cannibalization, and the need to work together. He also emphasized the importance of leveraging available resources and organizations to gain knowledge about international markets and best practices.

Matthew Aiden's key takeaway was the importance of understanding and meeting the **end user's needs and expectations** and that factors such as color and odor profile are critical.

Ms Mariette van Rooyen encouraged small and emerging producers to attend trade shows as visitors if they cannot afford booths. Shared platforms like the Cosmetics Global website and LinkedIn are valuable for connecting with buyers. Highlighted available funding for market research and export activities, inviting companies to contact her for support.

Ms. Antoinette Goosen emphasized the importance of authentic, high-quality, and chemotype-specific plant materials and stressed that sensory evaluation (“trusting your nose”) and understanding traditional and cultural backgrounds of plants enrich product formulation. She advocated for storytelling that includes the plant's origin, traditional uses, and cultural significance to add value and authenticity. She also highlighted the holistic impact of plants on emotional and spiritual well-being, beyond just their chemical properties. She emphasized also that certificates of analysis should include comprehensive chemical and physical profiles, not just GC data.

10. Projects/Activity update from members

Karen Swanepoel, SAEOPA, reminded attendees about the annual Indigenous Plant Users' Forum (IPUF), which will be held in Muldersdrift. The event will celebrate SAEOPA's 25th anniversary. IPUF is a valuable platform for academics to share research. There will be an exhibition featuring producers and value-adders, making it worthwhile to attend.

Serole Mketsu, GIZ, announced a partnership between ABioSA and BioPANZA for the African Biotrade Festival. GIZ will send out communication by the end of the week to inform SMEs how they can

participate and exhibit at the festival. The communication will include details on the participation process and how SMEs will be selected to be supported by ABioSA.

Anna G. Reyneke, SIPPO, shared that SIPPO will collaborate with the **dtic** and other partners on the upcoming trade fair, the [Anuga Trade Fair in Germany](#), scheduled for October. The Anuga Fair focuses mainly on processed foods and related sectors. SIPPO is also preparing for the third phase of their program, which will run from January 2026 to December 2029.

Serole Mketsu, GIZ, noted that the next forum will be held in October; the exact date will be shared soon. The plan is to use this forum to review and reflect on the progress of the third phase, which starts in January 2026. The forum will focus on facilitating knowledge sharing and learning across networks and communities of practices within the sector. Further details will be shared, but this is the overarching plan for the upcoming forum.

11. Wrap-up and way forward

The discussions centered on quality requirements for essential and vegetable oils, emphasizing the need to meet market demands and ensure sustainability. Key takeaways included: the importance of quality over volume, the significance of backstories for South African plants and oils, the necessity of standards and certifications, the potential of partnerships, the power of the aroma in the cosmetic industry, and focus on quality. The discussion also highlighted the need for collaboration among South African producers to compete effectively on the global market.

Dr. Meintjies shared the three main take-aways:

1 – It is not just about the volume; it is about quality. With the right quality, there are buyers in South Africa, even if your volume is not so high. *International buyers see our oils as exotic and often use low volumes of ingredients in their niche products.*

2 – We must work on the backstory of our plants and oils. *The story is also crucial if our oils are seen as exotic.*

3 – It is not just about finished products; our ingredients and even the raw plant material are in high demand. *There are many niches that we can still explore.*

12. Date and theme of 26th meeting and Closure

The 26th Biotrade Stakeholder's meeting to take place in October and ABioSA to host.

Appendix 1: Biographies of Panelists

Appendix 2: Results of the Registration Survey

Appendix 3: Group Photo

