



# **“Indigenous and Exotic Botanicals for Local and International Markets – More Opportunities or More Challenges?”**

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# The Broader Context

**International and local markets are depressed**

- **too many wars are diverting public funds**
- **companies are managing inventories cautiously**
- **reducing product and ingredient ranges**
- **diversifying risk due to climate change**
- **high hurdles of compliance in developed markets**
- **low buying powers in developing markets.**

**But... - there are always markets for good quality, well priced botanicals...**

- **Local market is limited. Some interesting developments – Unilever (spices, ingredients), Avon (ingredients) localisation efforts of supply chains– not sure about impact yet**
- **SA not always competitive with other Southern / Eastern African countries – lower labour cost, more expensive overheads, compliance, smallholder farming models**



# Commodity markets focus on well-established botanicals

Commodity	Annual production	Notes
Moringa	90000 - 140000 tons	strong growth expected
Peppermint	40000 tons	Tea, essential oil
Hibiscus	60000 - 70000 tons	Across the African continent as well as India etc.
Rosemary	30000 tons	Spice ingredient, extraction, essential oil
Rooibos	18000 tons	Expanding markets e.g. India, matured and well organised industry sector, investing in research to expand their health applications and therefore markets, research needed in broadening
Baobab		Southern Africa 15%, East Africa 25%; West Africa 60%, different standards and pricing, fruit powder, vegetable oil, leaves
Buchu	700 tons	Essential oil 6 tons, fluctuating prices, new entrants creating downward pressure
Harpagophytum	600 - 800 tons	±90% from Namibia, rest from Botswana, Angola, South Africa
Aloe ferox	<600 tons	regulatory challenges in EU, not yet recovered) – Aloe vera much easier and ready for markets
Honeybush	>300 tons	still struggling, different species, too expensive, immature industry
Pelargonium	<100 tons	South Africa and Lesotho



**Disclaimer: Most of the above figures are AI generated and are not necessarily based on verified statistics but can give an indication of order of magnitude**



# Novel and Indigenous Botanicals

- **Massive local regulatory hurdles – National Environment Management: Biodiversity Act (NEMBA) is cumbersome, complex, complicated slowing down market development**
- **Struggling to enter developed markets due to regulatory hurdles (EU, China etc.) – Novel Food, GRAS, etc.**
- **“Softer” markets like USA with broader definitions of e.g. dietary supplements**
- **Sceletium (Mesembryanthemum species) – 20 – 30 tons per annum - is interesting and developing rapidly – needs standards, research to underpin efficacy – working on GRAS status in the US, medicine in the EU too expensive**
- **Marula – some promising initial work for Novel Food for the Marula juice status in the EU – needs a lot more funding**



## Research & Development Needs

- **Genetic variability tends to be very broad – often due to very large distribution ranges – creating challenges of consistent supply**
- **Selecting and breeding of stable varieties – flavour, colour, taste, ingredient profiles**
- **Mass propagation and cultivation needed in due course**
- **Improved cultivation protocols – under irrigation, Baobab can produce fruit after 5 – 7 years vs 50 – 200 years in nature**
- **Marula – selection (flavour profiles, shelf life, extending the harvesting season, etc.) and plantations in Israel show the potential as a dryland crop**

# BioPANZA identified 25 plants for mass cultivation

## 25 SPECIES FOR CULTIVATION



*Hoodia gordonii*  
(Hoodia)



*Agathosma betulina*  
(Buchu)



*Aspalathus*  
(Rooibos)



*Buchu crenulata*  
(Buchu)



*Bulbine frutescens*  
(Burn Jelly)



*Cyclopia intermedia*  
(Honeybush)



*Cyclopia genistoides*  
(Honeybush)



*Eriosema kraussianum*  
(Bangalala)



*Harpagophytum procumbens*  
(Devil's claw)



*Helichrysum odoratissimum*  
(Golden everlasting)



*Hypoxis hemerocallidea*  
(African potato)



*Kigelia africana*  
(Sausage tree)



*Lobostemon fruticosus*  
(Lobostemon)



*Pelargonium reniforme*  
(Kidney leaved pelargonium)



*Pelargonium sidoides*  
(Kalwerbossie)



*Sceletium tortuosum*  
(Kanna)



*Siphonochilus aethiopicus*  
(Wild Ginger)



*Sutherlandia frutescens*  
(Cancer bush, balloon pea)



*Trichilia emetic*  
(Mafura – oil)



*Tylosema esculentum*  
(Marama bean - oil)



*Warburgia salutaris*  
(Pepperbark tree)



*Ximenia americana*  
(Sour plum – fruit and oil)



*X. caffra* (Sour plum – fruit and oil)



*Xysmalobium undulatum*  
(Uzara)



*Lippia javanica*





## Market Challenges

- **Compliance – safety regulations for food, cosmetics, proof of efficacy for medicines are massive hurdles that need to be factored in**
- **Certifications – organic, Fair Wild, Fair Trade, UEBT, Rainforest Alliance, Fair for Live, Living Wage, NEMBA compliance, GMP (= Give Me Paper...), etc.**
- **Very large volumes of plant material need to be available to service large markets - there is a massive gap between what is available in the short term and what may be needed**
- **Wild harvesting is not going to be sustainable enough – need for cultivation**
- **Manufacturing and processing capacities need to be created**
- **Marketing efforts to be increased to reach more potential consumers**



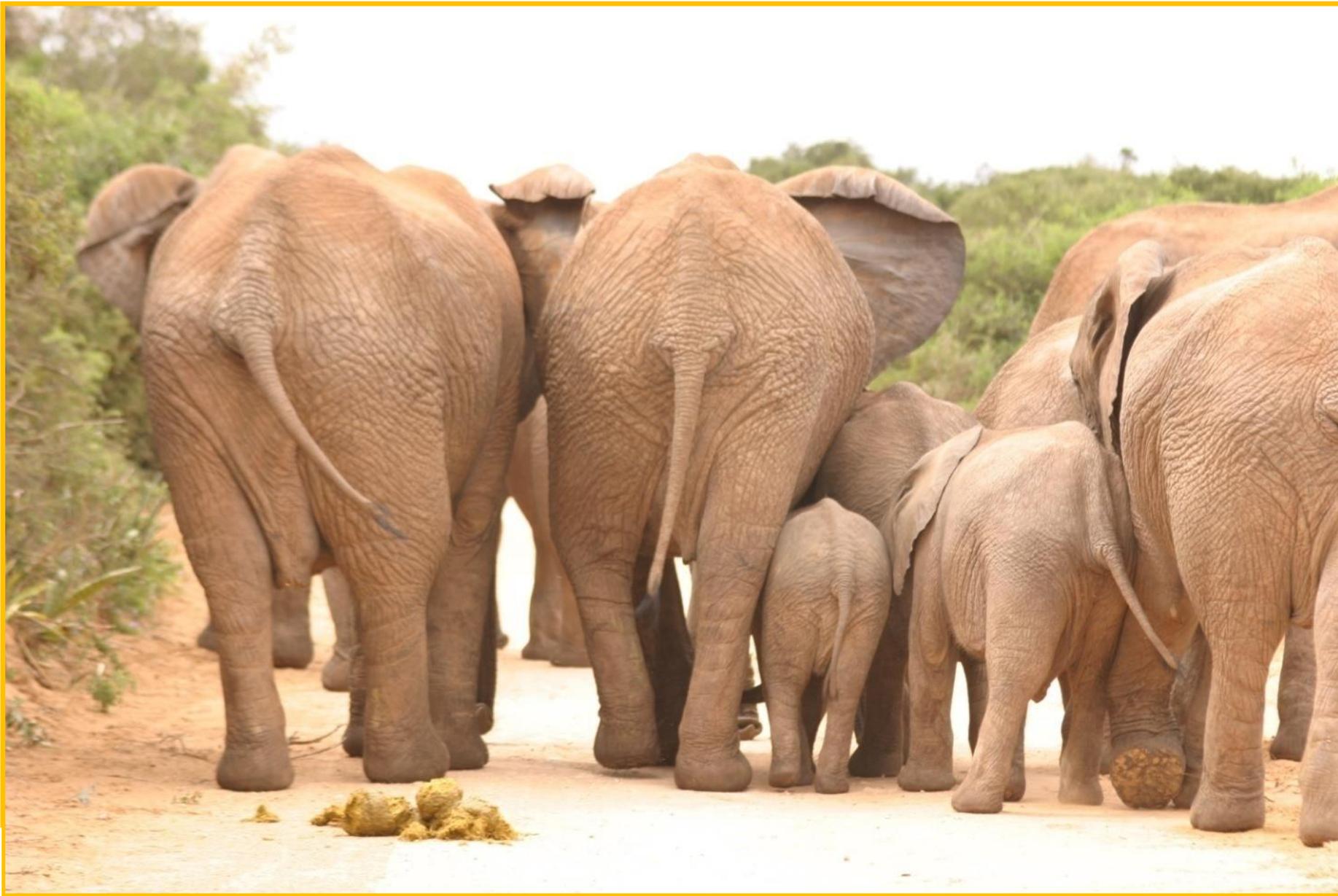
# Government Support

- **Bio Product Advancement Network South Africa (BioPANZA) cluster initiative of DFFE, DSTI and DTIC started in 2014 and relaunched in 2025. Various “clusters” have been formed to address supply, R&D, product development, market access. Very slow progress so far and needs to build up steam**
- **Hope to introduce mass cultivation and processing up to finished products into rural communities: this is seen as a major route to bring people into the mainstream economy. Some limited gains so far e.g. 60 SMMEs exhibited at the 2<sup>nd</sup> African Biotrade Festival in 2025. 120 SMMEs are planned for 2027.**
- **Dept of Agriculture has approved the inclusion of indigenous crops and medicinal plants into the list of declared agricultural products – falls now into the orbit of the National Agricultural Marketing Council (NAMC)**
- **External donor funding has been made available for Buchu Association, Southern African Botanical Products Association, Honeybush Tea Association etc. to develop and implement sector development plans – making progress but much basic groundwork has to be done first**



## So, what now – more opportunities or more challenges?

- Approach with caution – this sector is not for the fainthearted or the fortune hunter
- Have a long-term vision where you are not dependent on immediate income from your efforts – there are not many low-hanging fruit
- Cooperate with industry associations and key players in the industry
- Don't expect too much from Government – they have different priorities
- Companies in the developed world are realising that diversification into different region can assist with climate change risk mitigation
- Opportunities may emerge as you submerge yourself into the task or sector
- Apply out-of-the-box thinking



**Thank you very much for your attention**