A PROFILE OF THE SOUTH AFRICAN HONEYBUSH TEA MARKET VALUE CHAIN

2010

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Table of Contents

1. DESCRIPTION OF THE INDUSTRY 3

1.1 Producing Areas **3**

1.2 Production **3**

1.3 Employment **4**

2. MARKET STRUCTURE 5

2.1 Domestic Market & Prices 5

3. HONEYBUSH TEA EXPORTS 6

3.1 International perspective and influences **7**

3.2 Exports of different types of honeybush tea **8**

4. PROCESSING 10

5. INDUSTRY ORGANIZATION 10

6. MARKET VALUE CHAIN 12

6.1 Value Chain tree **13**

7. EMPOWERMENT ISSUES & TRANSFORMATION IN THE SECTOR 14

8. BUSINESS OPPORTUNITIES 15

9. SWOT ANALYSIS 16

10. CHALLENGES 19

11. ROLEPLAYERS IN THE HONEYBUSH TEA INDUSTRY 20

12. ACKNOWLEDGEMEMNTS 24

1. DESCRIPTION OF THE INDUSTRY

The South African Honeybush Tea Industry has a huge potential in the herbal tea category as it has no competition from other countries. Honeybush tea has unique health benefits and on a blind tasting with other teas, it has favorable response from the public. Furthermore, the Honeybush tea industry has the potential to position the tea within the major food trends as an organic, specialty health product and value added products such as ice-tea, green tea and baby products.

The introduction of honeybush utilisation and cultivation in South Africa enables communal farmers to advance their position in the value chain of honeybush products for the local and international markets. Commercialisation is therefore necessary, because, without it, the market for products will remain small with no potential for rural people to grow and generate income.

1.1 Producing Areas

Honeybush tea grows in the wetter Eastern Cape Mountains and spreads down along the Langeberg and Swartberg mountains into the Western Cape towards the coast as far as Bredasdorp. It is estimated that there are approximately 30 000 ha of mountainous land, including the Tsitsikamma, Kouga, Baviaans, Langeberg and Swartberg mountain ranges, where wild Honeybush grows sporadically within the greater fynbos biome (8 524 000ha).

1.2 Production

There are approximately 230 hectares of Honeybush tea under cultivation however, generally the tea is harvested from the natural mountainous veld and processed at on-farm processing facilities, currently being accredited with HACCP. Approximately 30 000 ha of honey bush tea is still harvested in the wild areas. Currently the Honeybush tea is produced on a limited commercial basis of 10 commercial producers who contribute 20% of the annual production and 5 commercial processors. During 2009, about 150 tons per year is produced and the demand exceeds the supply. This total may be divided into 50 tons packed for local consumption comprising of an approximate value of (20g=R10.00) R1, 2 million and 150 tons for export with an approximate bulk loose tea value of (R25/kg), R3.8 million.

Two of the plantations are managed by the Haarlem and Ericaville communities (developing farmers) who respectively have 20 hectares and 5 ha under cultivation and who aim to increase this to 35 ha and 15 ha respectively..

1.3 Employment

This sector has the potential to double its workforce. It has grown steadily at 20% over the past five years. It is estimated that there are approximately 150 to 200 entrepreneurial workers involved in wild harvesting of Honeybush tea (30 picking teams) and 10 entrepreneurial transporters. Cultivated Honeybush tea employs 100 families in the Ericaville and Haarlem communities and 40 farm workers on commercial farms and 20 women have been given the opportunity to purchase 20 hectares from a commercial farmer, who will assist them to plant Honeybush and purchase their crops. The average annual turnover is R75 000 per 20 hectares. The plots are managed on an individual basis, with each farmer responsible for his/her own plot. A female lead farmer of Haarlem was further empowered to start a commercial seedling nursery that had a sales turnover of R140 000 in 2005, and which created employment for about six seasonal workers.

Employment figures fluctuate considerably and differ from area to area depending on the harvest and the skills of people. Generally to establish a honey bush tea plantation between 5 and 10 people are required per hectare for a period of 2 to 3 days while harvesting require between 5 and 10 people per hectare per day. With wild harvesting each person can harvest between 30 and 100 kilograms of honey bush tea per day. The industry occasionally employs approximately 500 seasonal workers.

Table 1: Employment in the Honeybush Tea industry

Source of Employment	**No of workers**
Production/ Planting	60 – 100 people per annum, this can be higher if more hectorage is planted.
Wild Harvesting	50 people most of the year
Harvesting in plantations	100 – 150 people seasonally
First level processors	7 processors with 1 manager, 4 helpers each processor and 28

Source of Employment	No of workers
	workers mostly full time
Second level processors	1 big packer owned by 1 person, 5 helpers.
Tertiary level processors	80
Retail packaging plants	105
Distribution, marketing and export	6 big marketers and 12 helpers.
Research.	7 Researchers, 16 co –workers and 16 part time assistants.
Maintenance	30 full time

Source: South African Honeybush Tea Association (SAHTA)

Approximately 42 workers are employed at the first level processing facilities, whilst approximately 80 workers are employed at the second level processing facilities that also steam-pasteurize honeybush tea. Retail packaging plants employ a further 105 workers whilst tertiary level value adding companies employ a further 80 workers. Approximately 60-100 workers are currently involved in planting per annum; the number can be higher if more hectorage is planted. A further 87 jobs are created in the areas of distribution, marketing and local and export sales, whilst approximately 41 staff members are involved in research throughout the country and at various institutions. It is thus estimated that approximately 780 workers are directly involved in the Honeybush industry.

2. MARKET STRUCTURE

2.1 Domestic Market & Prices

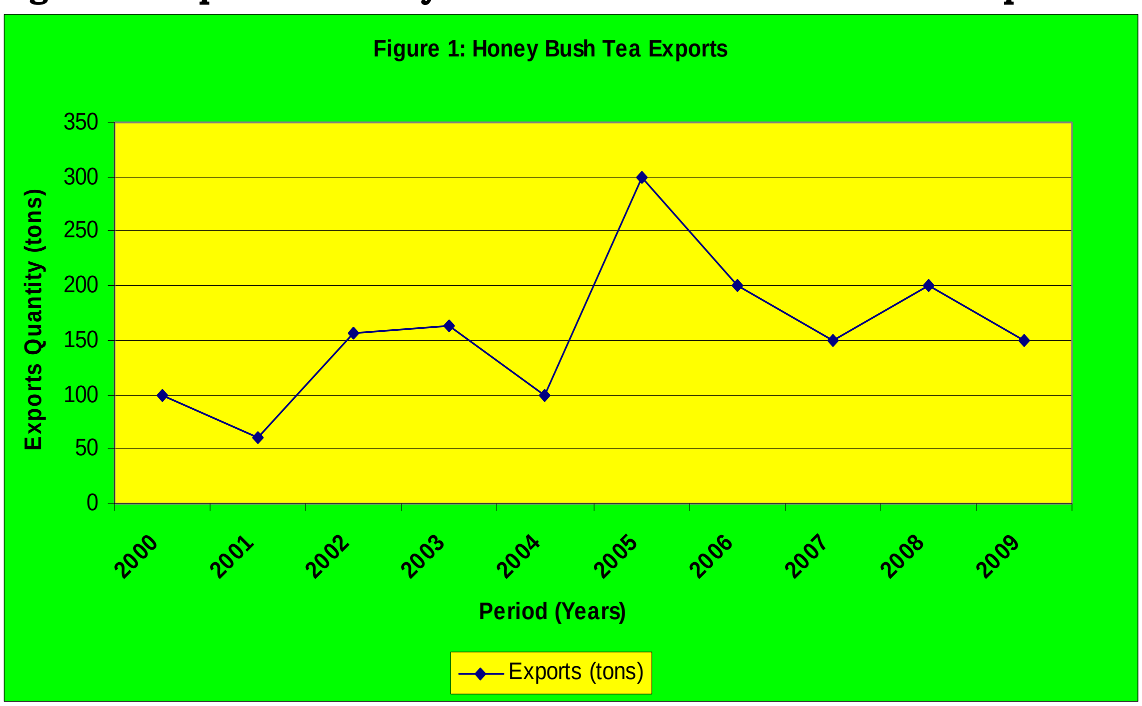
Approximately 5 brands of packed Honeybush tea and/or blends are distributed nationally in retail outlets by National Brands, Unifoods and Trophy Distributors. The tea is available at retail level in the form of loose tea and tea bags. Big multinational and local companies such as Lipton, Freshpak and Five Roses have launched Honeybush under their own brand names. Other smaller brands are distributed to farm stalls and local Spar supermarkets. Spar and Woolworths are the first supermarket chains to launch their in-house Honeybush brands. Local sales have increased steadily from approximately 5 tons in 2001, 10 tons in 2002 to 52 tons in 2003.

Tea brokers who export honey bush tea to various export markets used to pay farmers between R1.00 and R3.00 per kilogram of fresh material between the years 1999 and 2003/04 and this has increased to R2.00 to R3.50 per kilogram of fresh material between the years 2003 to 2007. The prices for processed tea varied between R12.00 and R18.00 per kilogram between the years 1999 and 2006 while in 2007/08 the price was between R20.00 and R28.00 per kilogram. Between 2008/2009 the price of processed tea per kilogram varied between R25.00 and R35.00.

3. HONEYBUSH TEA EXPORTS

There are 15 tea brokers who export Rooibos and Honeybush teas and 4 retail product brokers who include packed Honeybush tea as part of a basket of other products exported. There are also 3 Honeybush processors and value adding processors who export directly in bulk. Other industry export and investment facilitators are Wesgrow, TISA and the WC Department of Economic Affairs and Tourism. Future customers of honeybush tea are UK, Japan, Germany and Switzerland where health drinks are particularly sought after.

Figure 1: Exports of honeybush tea between 2000 and 2009 period.



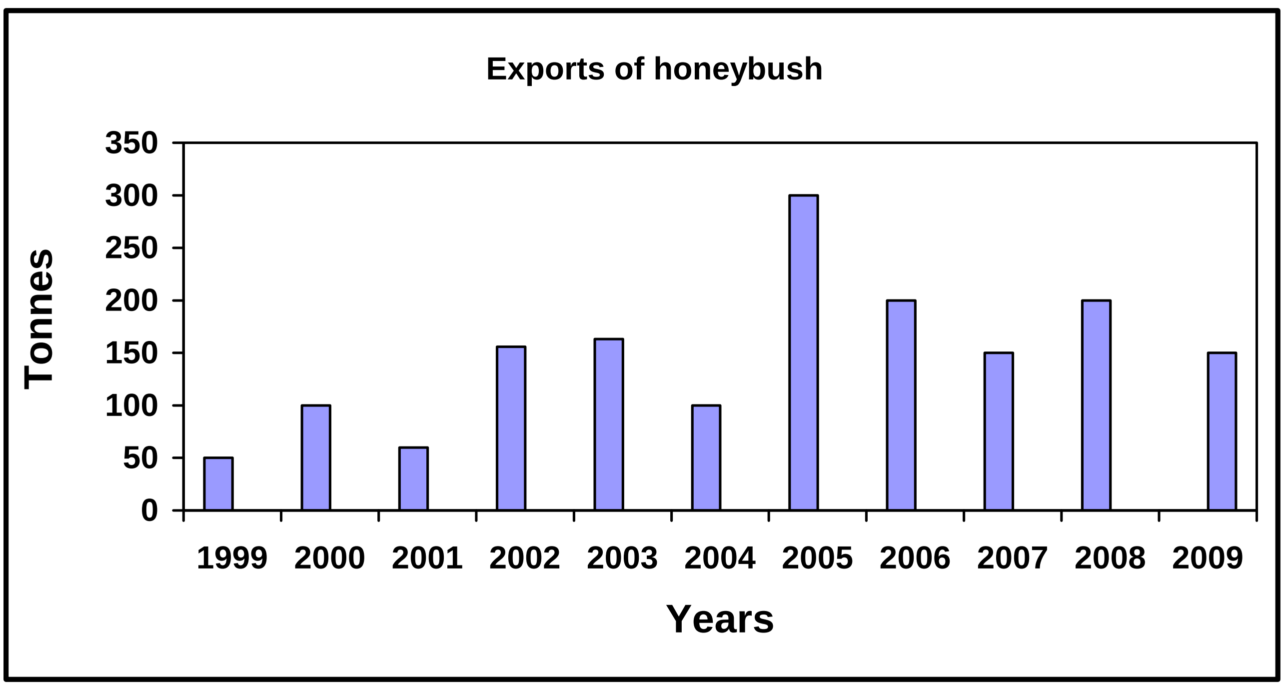
Source: South African Honeybush Tea Association (SAHTA)

Figure 1 indicates the trend in honey bush tea exports between 2000 and 2009and the quantities of honey bush tea (tons) processed for export market. Exports volumes of Honey bush tea have shown greater fluctuations in volume terms between the period 2000 and 2009. Greater increases in the volume of honey bush tea exports occurred between 2002 and 2003 up until there was a peak in 2005 and between 2006 and 2009 the export volumes were still great although there was a decline.

3.1 International perspective and influences

The Netherlands is the biggest honeybush buyer (about 35% of exports in 2008 and 2009), followed by the UK (19% and Germany (about 17%) which is the world's largest importer of herbal ingredients. The consumption of hot drinks in these countries is high, which means that the market is mature and competition among manufacturers is intense.
Green tea and herbal /fruit tea witnessed dynamic growth in the market due to being perceived as being natural and conducive to healthy living. These kinds of teas benefit both from their apparent advantages concerning health, such as no (or low) caffeine content/helping to fight free radicals, which are believed to contribute to ageing and life style diseases.

Figure 2: Exports of honeybush tea between 1999 and 2009 period



Source: SAHTA

Figure 2 indicates exports of honeybush tea between 1999 and 2009 period. The graph shows greater fluctuations in terms of honeybush exports in tons. The graph also shows that in 1999 South Africa exported very low levels of honeybush tea at approximately 50 tonnes while in 2005 exports of honeybush tea reached a peak at approximately 300 tonnes. Between 2005 and 2009, there were fewer fluctuations in terms of honeybush tea exports as shown in the graph that the export levels were between 150 and 300 tonnes.

3.2 Exports of different types of honeybush tea

Honey bush tea is exported as conventional, organic and green tea. Most of the tea is exported in bulk and repackaged under various brand names. The tea classified as organic originates both from wild harvested and cultivated tea. Table 2 gives a summary of the different types of honeybush tea as a percentage of the total exports in 2008 - 2009 for the markets in different countries.

Table 2: Percentage exports of different types of honeybush tea to different countries (2008 – 2009) period.

Country	**Conventional**	**Organic**	**Green Tea**	**Total**
Germany	22.76	4.05	0	26.82
United States of America	0	9.80	0	9.80
Netherlands	44.04	0	3.04	47.08
Australia	0	0	0	0
Canada	18	126	0	144
United Kingdom	7.67	500	0	8.17
South Korea	0	540	0	540
Norway	0	360	0	360
Japan	1.000	3.12	0	4.12
Poland	8.02	0	0	8.02
Singapore	0	0	0	0
Taiwan	0	0	0	0
Sri Lanka	200	0	0	200
China	0	42	0	42
France		0	0	0
Switzerland	0	0	0	0
Denmark	0	0	0	0
Total	**301.49**	**1 584.97**	**3.04**	**1 390.01**

Source: South African Honeybush Tea Association (SAHTA)

Table 2 shows that during 2008/2009 period, Sri Lanka is the major export market of conventional honeybush tea with approximately 200 tons, while South Korea is major export market of organic honey bush tea with approximately 540 tons. Netherlands is still the main export market of green tea although the volumes in terms of tons are very low at 3.04.

Table 3: Top importers of honey bush tea from the world between 2008 and 2009 period.

	Country	Percentage
1	Netherlands	35.00
2	United Kingdom	19.00
3	Germany	17.00
4	USA	14.15
5	Japan	4.71
6	Poland	4.15
7	Czech Republic	1.05
8	Sri Lanka	0.81
9	Russia	0.60
10	Australia	0.48
11	Bulgaria	0.51
12	Norway	0.45
13	Austria	0.42
14	Chile	0.35
15	South Korea	0.28
16	China	0.20
17	New Zealand	0.11
18	Malaysia	0.10
19	Canada	0.07
20	Hong Kong	0.05
21	Portugal	0.05
22	Switzerland	0.02

Source: South African Honey bush Tea Association (SAHTA

Table 3 shows that during 2008-2009 period, Netherlands was the biggest Honeybush buyer (about 35% of exports in 2008-2009), followed by United Kingdom at (19%), Germany at (17%) and lastly United States of America (about 14.15%) while countries like Hong Kong, Poland and Switzerland showed that they were the least importers during that period at 0.05%, 0.05% and 0.02% respectively...

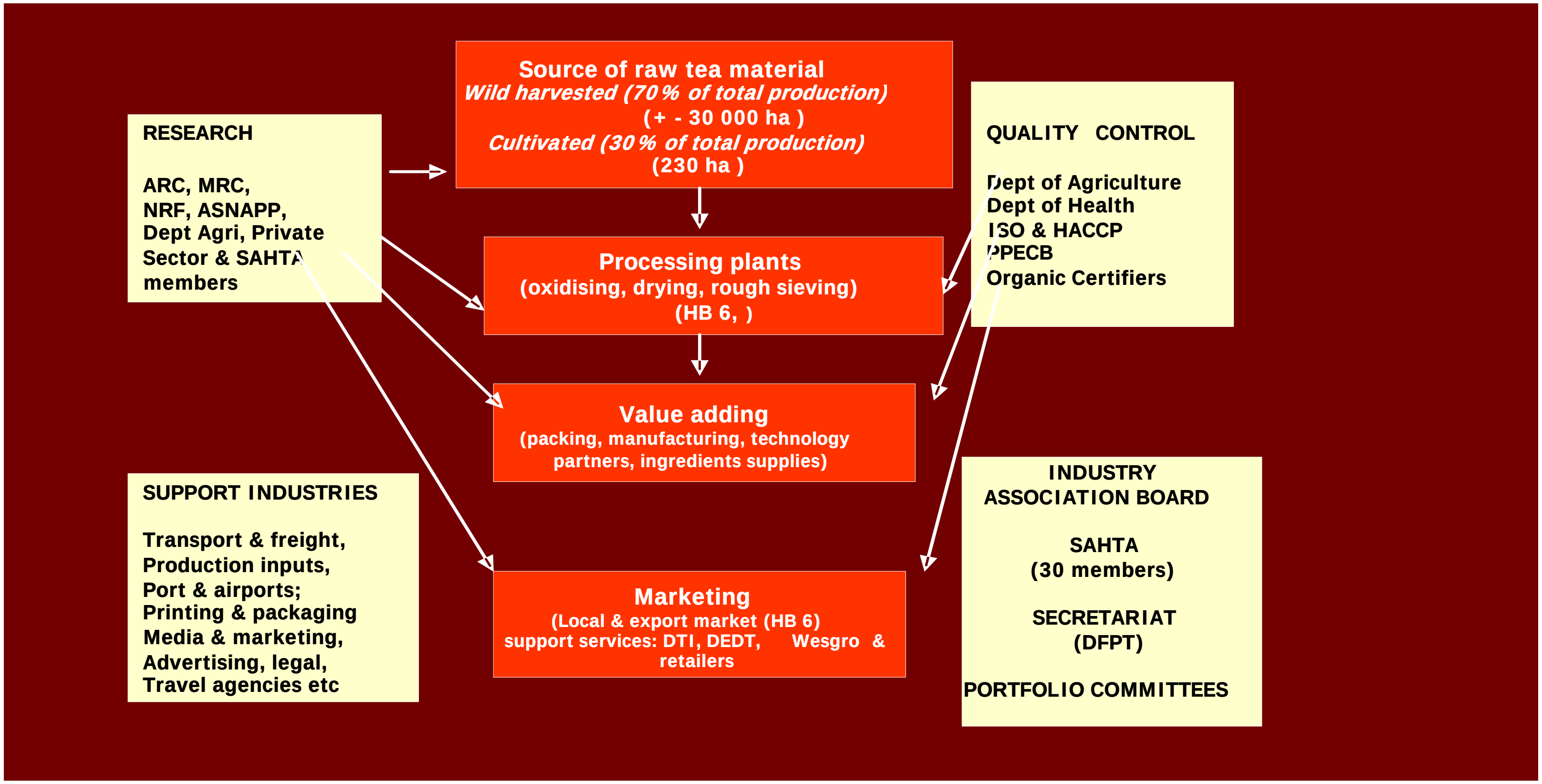
4. PROCESSING

Most harvesting and first level processing occurs on farms within the producing areas with the exception of one on-farm processor in Riversdale. The second- and tertiary level processing and marketing occurs in Port Elizabeth, Mosselbay and Cape Town. There are 8 on-farm honeybush processors who chop and oxidize the green unfermented honeybush tea into red brown tea; four second level processors who steam pasteurize tea, do sieving and dust extraction; seven third level processors involved in retail contracting and in-house packing. Tertiary level value adding companies (8) are involved in production of instant teas, cool method green tea processing, pharmaceutical extracts, novel product development such as ice teas, cosmetics, liqueurs, chocolates, liquid concentrates, and Honeybush blends with other indigenous plants.

5. INDUSTRY ORGANIZATION

Depicted in Figure 2 below is the number of firms, industry associations, levels of concentration in production, marketing and distribution, level of organization and co-operation in the Honeybush tea industry:

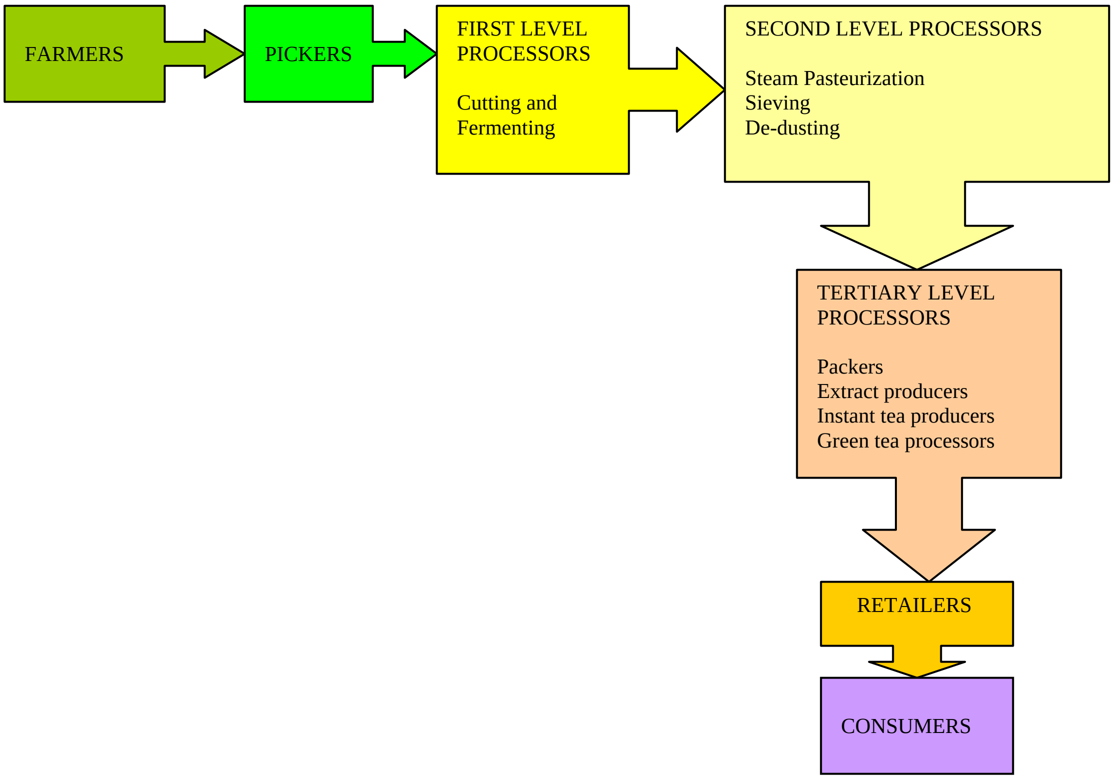
Figure 3: Honeybush tea industry organization



Source: SAHTA

6. MARKET VALUE CHAIN

Figure 4: Honeybush tea market value chain



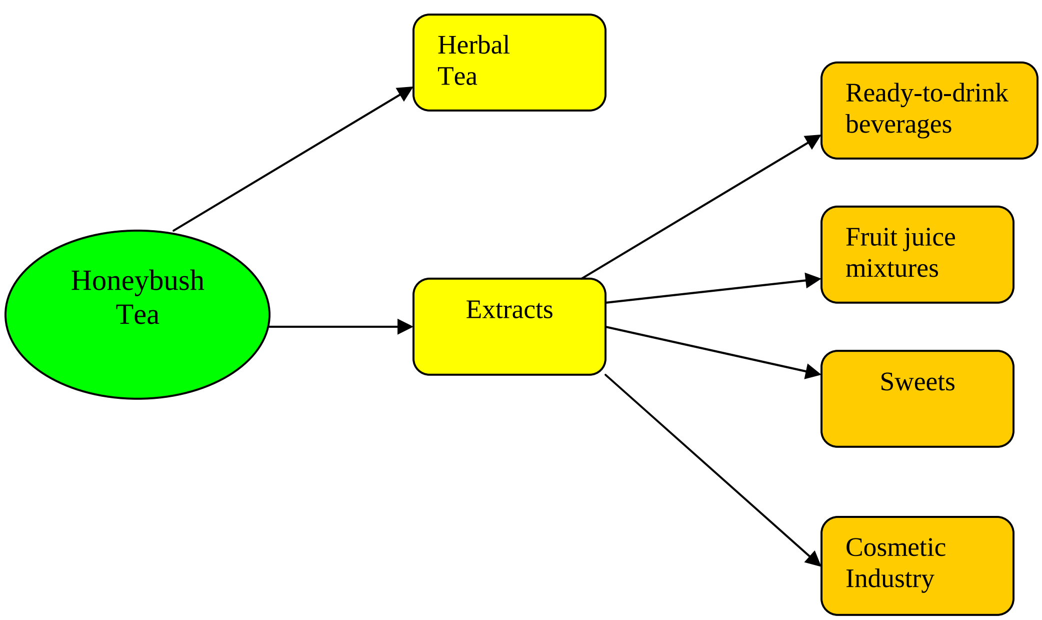
The honeybush value chain is a complex structure and a difficult subject to define because of its wide ranging scope, variation and its global nature. In its broadest sense, the honeybush value chain comprises agriculture, horticulture, food and drink manufacturing, wholesaling, retailing and catering industries.

The honeybush value chain further comprises a number of businesses, both large and small, who are all dependent on each other in the chain to make their businesses succeed. Experience has shown that the future success of the honeybush industry depends on the extent to which it succeeds in managing the entire value chain in order to enhance the global competitiveness of the industry. This means that the value chain has to be managed as an integrated network rather than as a series of functions with a linear connection. Thus, it is also important that empowerment programmes be implemented in all spheres of the value chain for meaningful change. The various avenues for empowerment that result from this approach have the added advantage of catering for the different needs and capacities of the participants in empowerment programmes.

6.1 Value Chain tree

As depicted in Figure 4 Honey bush tea is mainly sold as herbal tea, but its extracts are also produced for the food and beverage industry to add to various products such as ready-to-drink beverages, fruit juice mixtures and sweets. A flavor extract, comprising the volatile fraction, is also on the market Other applications of the extracts are by the cosmetic industry.

Figure 5: Value Chain Tree



7. EMPOWERMENT ISSUES AND TRANSFORMATION IN THE SECTOR

There is a great potential for share equity schemes and small farmer development in Honeybush production. Land transfers on existing commercial farms provide a viable equity opportunity for historically disadvantaged people. Presently one commercial farmer in the Honeybush industry has created the “Mooi Uitsig Trust”, an empowerment program where female workers are able to purchase land on his farm at a nominal rate with land subsidy grants of R20 000 per individual. The new landowners are able to continue their present employment, while setting up their Honeybush tea plantations, with the farmer’s assistance in land preparations.

In addition community based cultivation projects, such as the Haarlem and Ericaville communities, need low capital input to develop Honeybush as a cash crop. The land is leased from the local municipality or purchased with land grants and community members are currently being assisted by NGO’s such as ASNAPP (Agribusiness in Sustainable Natural African Plant Products) and the Western Cape’s Department of Economic Affairs and Tourism.

Through the Honey-bush tea Action Plan (which is part of the industry’s Business Plan for 2010) two communities (Haarlem and Ericaville) were empowered to establish 30 hectares, which is about 12% of the total estimated 250 hectares currently under commercial cultivation. The core focus of this action plan is to improve the supply of skilled workers to the industry. Successful human resource development would require that specific attention be given to the skewed access and participation of black people in the industry in the whole value chain. Training and skills development is needed in:

- production practices of the different honeybush species;
- practical skills programmes in the honeybush processing business;
- general business skills (including financial, marketing and risk management);
- training on aspects related to market quality assurance requirements by the market;
- interpretation and handling of market and business information;
- understanding of the components and terms of contracts; and elementary aspects related to the working of future markets.

8. BUSINESS OPPORTUNITIES

- The low set-up costs per hectare and Honeybush tea's suitability for plantation on marginalized mountainous and low rainfall land such as the Langeberg Mountains and the little Karoo makes the Honeybush tea an ideal crop for black economic- and women-empowerment agricultural program. The wild reserves also provide entrepreneurial opportunities for pickers.
- Although the increased international demand for Honeybush tea is a positive sign of the indigenous tea industry's future prospects, it should be noted that more than 90% of Honeybush tea traded internationally is sold in bulk as opposed to retail packaging.
- International buyers pack the tea themselves, develop their own brand names and trademarks, and then make more money from a unique South African product than the country itself. Exporters cannot simply stop selling bulk Honeybush tea, but they could add more value by developing a variety of products that will meet the demands and preference of both the buyers and their consumers.
- Honey bush tea as a South African product which is endemic to the Western and Eastern Cape Provinces is generally of high quality and internationally in demand.
- There is land, capital and labor available to increase production.
- Several new markets exist which are currently not been explored by South African companies in this industry.
- Public awareness of the health benefits of herbal teas.
- More good news for the honeybush industry is that consumers are increasingly seeking functional ingredients in beverages.
- As consumers age, they become more health conscious and often reject indulgent beverage brands.
- In the Asia-Pacific region, the soft drinks market aimed at elderly people is already flourishing and much of the success of health products is due to sales to pensioners.
- The market in African traditional medicines and teas is still virtually unexplored. Sales of natural health products therefore seem to be directly affected by the depth and extent of media reports on clinical research.

- Sophisticated and health-conscious markets are showing strong demand for honeybush as a stand-alone tea, as well as for blending with other herbal teas and fruit juices.

- New innovative product applications, such as unfermented (green tea), organic, flavoured and instant products, are further expected to give sales a significant boost, not only in existing niche market segments, but also as regards new markets.

- International demand for our indigenous teas has steadily gathered momentum over the years and the markets for these are far from saturated, even in the largest importing countries.

- Although the increased international demand for quality honeybush is a positive sign of the indigenous tea industry's future prospects, it should be noted that more than 90% of honeybush tea which is traded internationally is sold in bulk as opposed to retail packaging.

9. SWOT ANALYSIS (Strengths, Weaknesses, Opportunities, Threats)

Strengths

- Only source of raw material worldwide,
- Process initiated to register name "honeybush" as a trademark,
- Novelty in foreign markets,
- Organic cultivation in line with world trends,
- The set-up and maintenance costs per hectare are relatively low,
- Sufficient agricultural land is available for expansion purposes,
- Good relationships exist between the historically disadvantaged pickers, cultivators and processors,
- SAHTA (South African Honeybush Tea Association) has been established and running for the past six years to champion the course of the industry as a whole and is a Section 21 Company registered and recognised as industry body,
- The tea is caffeine free, low tannin and has some anecdotal culturally known health benefits,
- The industry has innovated technology in the processing, refining and value-adding of Honeybush tea,
- The Honeybush tea industry can benefit from the advances in technology made in the Rooibos industry including green Honeybush, instant Honeybush and other Honeybush products such as liqueurs and chocolates,

- The tea is also suitable for babies (current value-added trend),
- The tea is also seen as a functional food and is part of a growing herbal tea sector and health market (current value-added trend),
- The tea blends well with fruit juices and other indigenous herbs,
- Good media and marketing opportunities exist in both the domestic and international market through press releases on the fact that the tea is labor intensive to harvest, grows in remote mountainous regions, benefits historically disadvantaged entrepreneurs and has no know negative attributes,
- Fair Trade is already marketing the tea in the European Union,
- The industry has experience in and control mechanisms in place for exports (PPECB and Department of Agriculture).

Weaknesses

- Wild reserves are under pressure and there may be a resultant loss of these wild reserves,
- Honeybush seeds are not on the strategic plant list,

- Small scale and commercial farmers compete with wild tea suppliers and can sometimes not sell their crops or are too far from processing facilities,
- There is a shortage of expertise for setting up and managing plantations,
- *Cyclopia intermedia* (mountain/wild tea) is more popular than most cultivated species,
- Honeybush is often confused with rooibos,
- Tea of variable quality is being marketed,
- Community projects lack the resources, capital and skills to do end product value added marketing
- There is a lack of funding for research on the cultivation of honeybush tea,
- Community members lack transport and access to communication facilities to facilitate their involvement with SAHTA
- The industry is perceived as too small by funding institutions such as the Innovation Fund and precluded from accessing funds

- There are no pasteurization and refining and tertiary value adding facilities in the Langkloof so the tea is costly to transport 600km to Cape Town
- Some on-farm processing plants need to still be HACCP registered
- Capital investment needs to be made to develop large scale commercial plantings
- Importers demand bulk product and disallow value-adding in South Africa (big multinationals protecting their market share and processing operations)
- No international generic marketing campaign has been embarked upon and, the following issues are key:
  - Honeybush has no secured market position and share as a stand alone product,
  - No common information exists on different markets or market segments
  - Honeybush tea competes with the well known rooibos,
  - Little knowledge about labeling requirements
  - Less than container loads are very expensive
  - Lack of marketing experience and support abroad
  - The public is not aware of Honeybush tea
  - No developed distribution channels internationally,
  - High cost to do value adding and product development.

Opportunities

- There are possibilities of growing foreign markets through a generic marketing campaign,
- Protected designation of Product of Origin (PDO) and Protected Geographic Indication (PGI) registration,
- Huge potential to register as Geographic Indicator from South Africa,
- Increased number of bilateral free trade agreements,
- Local market sales can be increased thereby sustaining growth without currency fluctuations,
- New crop development and large-scale planting of the tea (minimum 1 000 hectares over next few years) with support from institutions,
- Nursery setup to provide seedlings (8,000–10 000 seedlings per hectare),
- Packing plant and export via Port Elizabeth makes the tea more price competitive,

- Demand exists for new value-added products such as Honeybush green tea, ice tea, cosmetics, neutraceutical products and medicinal extracts for specific medicinal indications,
- Financing exists for both commercial and small scale farming, e.g. from the Land Bank's Micro-lending facility.

Threats

- International markets resist value adding in South Africa
- Loyalty of supply to marketers is fickle
- Industry lacks cohesion on pricing structure which leads to frustration with overseas buyers
- Depletion of wild reserves
- The variable quality of tea sold can harm the consumer's perception of the tea, e.g. poor color draw can create the perception that the tea is weak
- Honeybush name has been trademarked in Japan which could impact on foreign earnings
- The proposed tax on farm land can have an impact on land values, profitability and creditworthiness of farming operations,
- Strong and variable currency.

10. CHALLENGES

Presently, the South African Honey bush tea industry is facing a number of challenges such as the following:

- The impact of increasing globalization,
- Deregulation in the agricultural sector,
- The necessity to transform in terms of broad-based BEE,
- The impact of a slow institutional and regulatory environment which affects the cost of doing business,
- An initial non-profitable period during the cultivation process, resulting in producer income being under tremendous pressure and thus leading to consolidation in the primary and secondary supply chain.

11. ROLEPLAYERS IN THE HONEYBUSH TEA INDUSTRY

11.1 PICKERS

11.1.1 Haarlem Pickers
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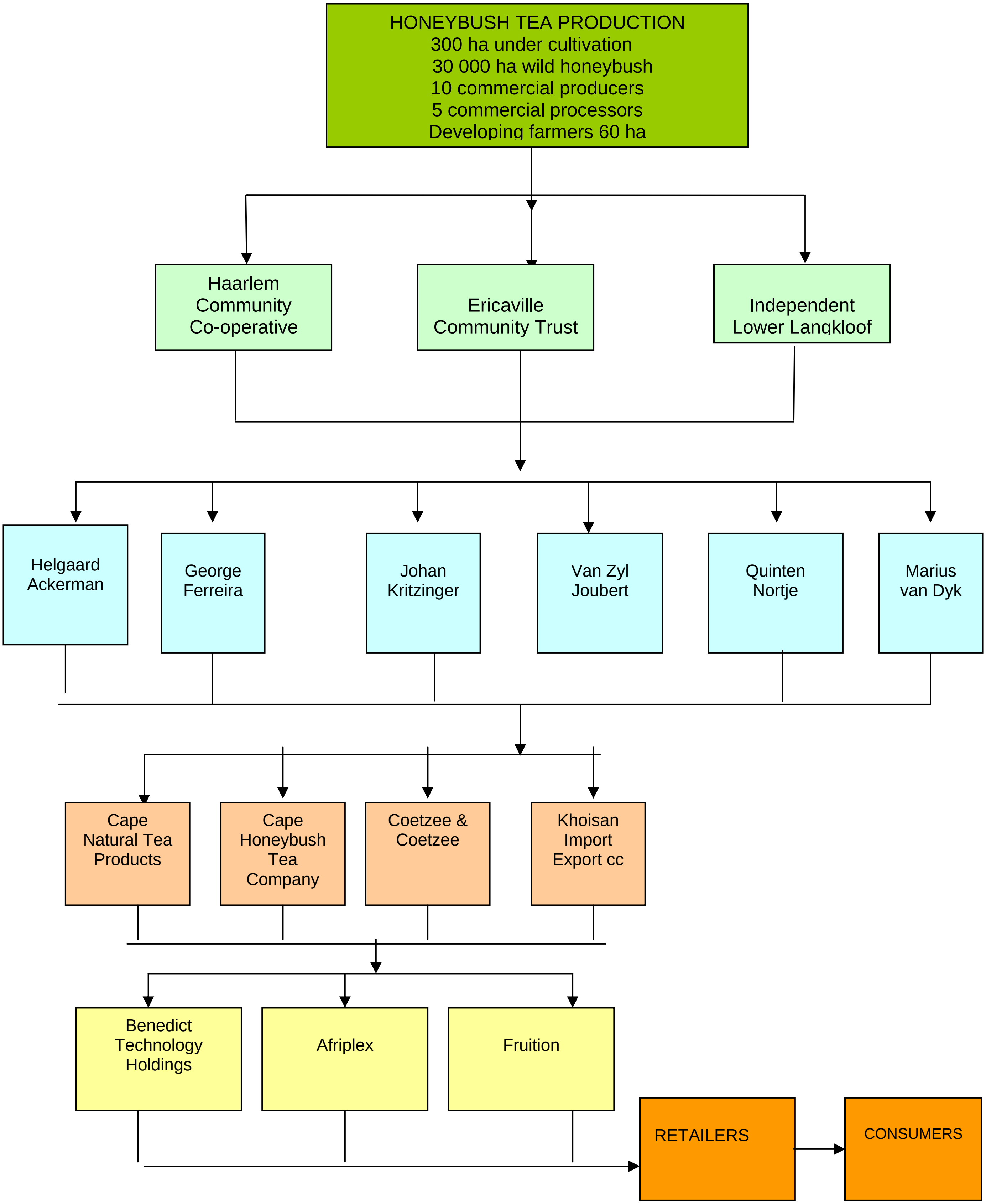
Figure 6: Honeybush tea value chain players.



NB: Information about the processors' market share, turnover and contribution to employment is not yet available.

12. ACKNOWLEDGEMENTS

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