A PROFILE OF THE SOUTH AFRICAN HONEYBUSH TEA MARKET VALUE CHAIN

2013

Directorate Marketing
Private Bag X 15
Arcadia
0007
Tel: 012 319 8455
Fax: 012 319 8131
E-mail: MogalaM@daff.gov.za
www.daff.gov.za

agriculture, forestry & fisheries

Department:
Agriculture, Forestry and Fisheries
REPUBLIC OF SOUTH AFRICA

Table of Contents

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

The area planted with honeybush currently exceeds 120 hectares 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 30% of the annual production and 5 commercial processors. South Africa produces about 200 tons of honeybush tea per year and the demand exceeds the supply. This total may be divided into 50 tons packed for local consumption comprising of an approximate value of R1, 2 million (20g = R10.00) 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. Currently, 70% of honeybush tea is wild-harvested and only 30% is cultivated.

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, Groendal, Genadendal 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 honeybush tea per day. The industry occasionally employs approximately 500 seasonal workers including dependents during 2012.

Table 1: Employment in the Honeybush Tea industry (2012)

Source of Employment	**No of workers**
Production/ Planting	60 – 100 people per annum, this can be higher if more hectorage is planted. 50 people most of the year
Wild Harvesting	Estimated at 100 – 150 people seasonally
Harvesting in plantations	5 processors with 1 manager, 4 helpers each processor and 28 workers mostly full time
First level processors	1 big packer owned by 1 person, 5 helpers. 80
Second level processors	105
Tertiary level processors	20 big marketers and 12 helpers.
Retail packaging plants	7 Researchers, 16 co –workers and 16 part time assistants.
Distribution, marketing and export	20 full time
Research.	
Maintenance	

Source: South African Honeybush Tea Association (SAHTA) & Agric Research Council

Approximately 50 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 20 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 500 workers are directly involved along the honeybush tea value chain from production to the final product.

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 2006.

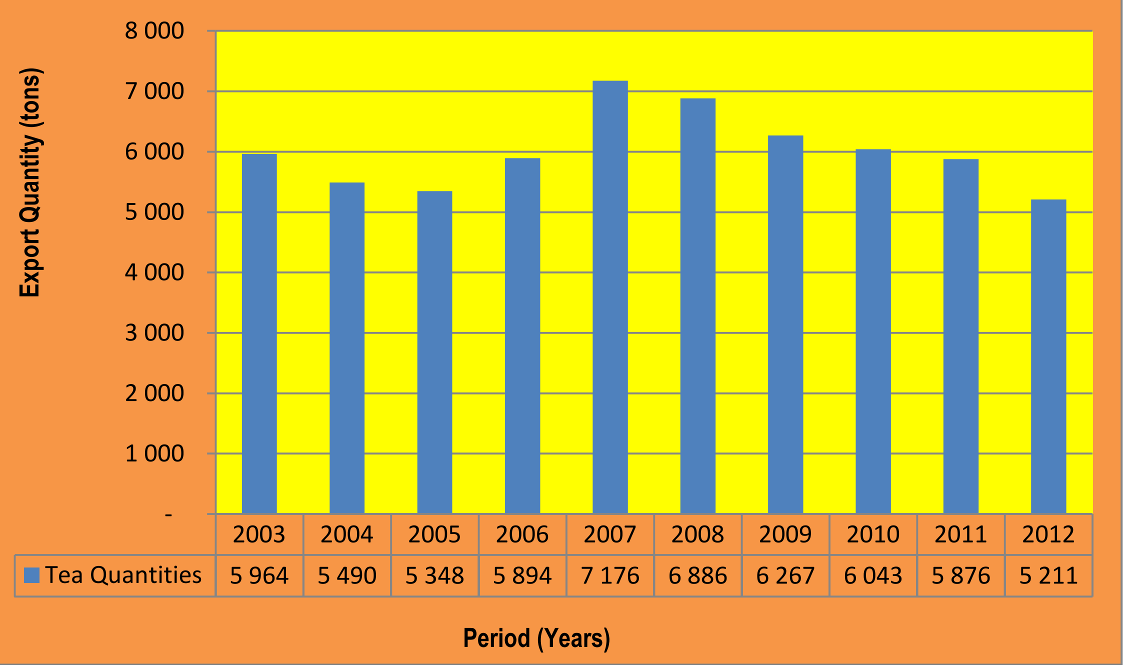
Tea brokers who export honey bush tea to various export markets used to pay farmers between R2.50 per kilogram of fresh tea material between in 2003/04 and this has increased to R5.00 to R8.00 per kilogram of fresh material in 2012. The prices for processed tea varied between R12.00 and R18.00 per kilogram between the years 1999 and 2006, while in 2007/08 the price was between R20.00 and R28.00 per kilogram. Between 2011/2012 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 5 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 below indicates the trend in honeybush tea exports between 2003 and 2012 and the quantities of honeybush tea (tons) processed for the export market.

Figure 1: Exports of processed bulk honeybush tea from South Africa



Source: South African Honeybush Tea Association (SAHTA)

Figure 1 further indicates that export volumes of honeybush tea from South Africa to the world started to increase in 2003 at approximately 5964 tons, until a slight decline between 2004 and 2005 was experienced. The figure also indicates that export volumes of honeybush tea from South Africa to the world started to increase in 2006 until a peak was attained in 2007 at 7176 tons. Greater increases in the volumes of honeybush tea exports occurred again during the second half of the ten year period although the market was declining. Export volumes of honeybush tea from South Africa to the world declined substantially in 2012 to lower levels of about 5211 tons. The figure also indicates that there was a 11.3% decline in export volumes of honeybush tea from South Africa to the world in 2012 as compared to 2011.

3.1 International perspective and influences

Most of this commercial crop is exported with 40% of exports going to Germany (which is the world's largest importer of herbal ingredients) during the 2012 marketing season, followed by the UK at 14% and Netherlands at 13% respectively. 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.

Table 2 below depicts that honeybush 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 during the 2012 period.

Table 2: Percentage exports of different types of honeybush tea to the world (2012)

Country	Conventional	Organic	Green Tea	Total	Percentages
Germany	1 884 093	157 190	59 335	2 100 618	40%
United Kingdom	566 685	136 804	16 002	719 491	14%
Netherlands	570 095	72 019	37 095	679 209	13%
USA	198 883	167 070	22 802	388 755	7%
Japan	176 047	197 005	8 528	381 580	7%
Belgium	111 600	37 960	2475	152 035	3%
Zimbabwe	115 145	92	18	115 255	2%
Australia	49 915	61 253	252	111420	2%
Sri Lanka	66 834	9 395	0.00	76 229	1%
France	52 047	19 493	18	71 558	1%
India	38 304	23 380	0.00	61 684	1%
Russia	50 058	8 550	594	59 202	1%
Poland	54 000	0	0.00	54 000	1%
Total	**234 083 301.49**	**1 584.97**	**3.04**	**1 390.01**	

Source: South African Honeybush Tea Association (SAHTA)

Table 2 depicts percentage exports of different types of honeybush teas from South Africa to different world countries during 2012. The table further depicts that Germany was the major export market of conventional honeybush tea from South Africa with approximately 1 884 093 kilograms, while Japan was the major export market of Organic honeybush tea with approximately 197 005 kilograms. Germany was also the major export market of green tea in 2012 with 59 335 kilograms of green tea during the same period under scrutiny.

Table 3: Exports volumes (kilograms) of different types of honeybush tea from South Africa to Germany during 2012 period

Months	Conventional	Organic tea	Green tea	Total
January	89 100	0	17 000	106 100
February	199 273	47	8 254	207 574
March	55 178	6 210	0	61388
April	55 118	17 500	0	72 618
May	218 330	0	50	218 380
June	157 388	4 950	1 650	163 988
July	126 646	5 219	0	131 865
August	154 164	39 350	3 344	196 858
September	159 511	25 491	6 213	191 215

Months	Conventional	Organic tea	Green tea	Total
October	244 294	27 423	0	271 717
November	273 981	31 000	22 824	327 805
December	151 110	0	0	151 110
Total	**1 884 093**	**157 190**	**59 335**	**2 100 618**

Source: South African Honey bush Tea Association (SAHTA)

Table 3 shows exports volumes (in kilograms) of honeybush teas from South Africa to Germany between January and February of 2012. The table further shows that Germany was the major export market of conventional honeybush tea from South Africa with approximately 1 884 093 kilograms, while Organic tea worth approximately 157 190 kilograms. Green tea exports from South Africa to Germany worth 2 100 618 kilograms during the same period under examination.

Table 4: Top importers of honeybush tea from the world 2012 period

	Country	Total (Kilograms)	Percentage
1	Germany	50.478	55.02
2	USA	17.213	18.76
3	Netherlands	14.382	15.68
4	Bulgaria	6.005	6.55
5	Canada	1000	1.09
6	UK	900	0.98
7	Malaysia	720	0.78
8	Australia	366	0.40
9	Norway	336	0.37
10	France	182	0.20
11	China	90	0.10
12	Switzerland	50	0.05
13	New Zealand	18	0.02
	Total	91 740	100.00%

Source: South African Honey bush Tea Association (SAHTA)

Table 4 illustrates the top importers of honeybush tea from the world during 2012. The table further illustrates that Germany was the biggest honeybush tea buyer (about 55% of exports in 2012), followed by USA at (18.76%), Netherlands at (15%) and lastly Bulgaria (at about 6.5%) while countries like New Zealand, Switzerland, and China illustrated that they were the least importers during that period under examination at 0.02%, 0.05% and 0.10% 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.

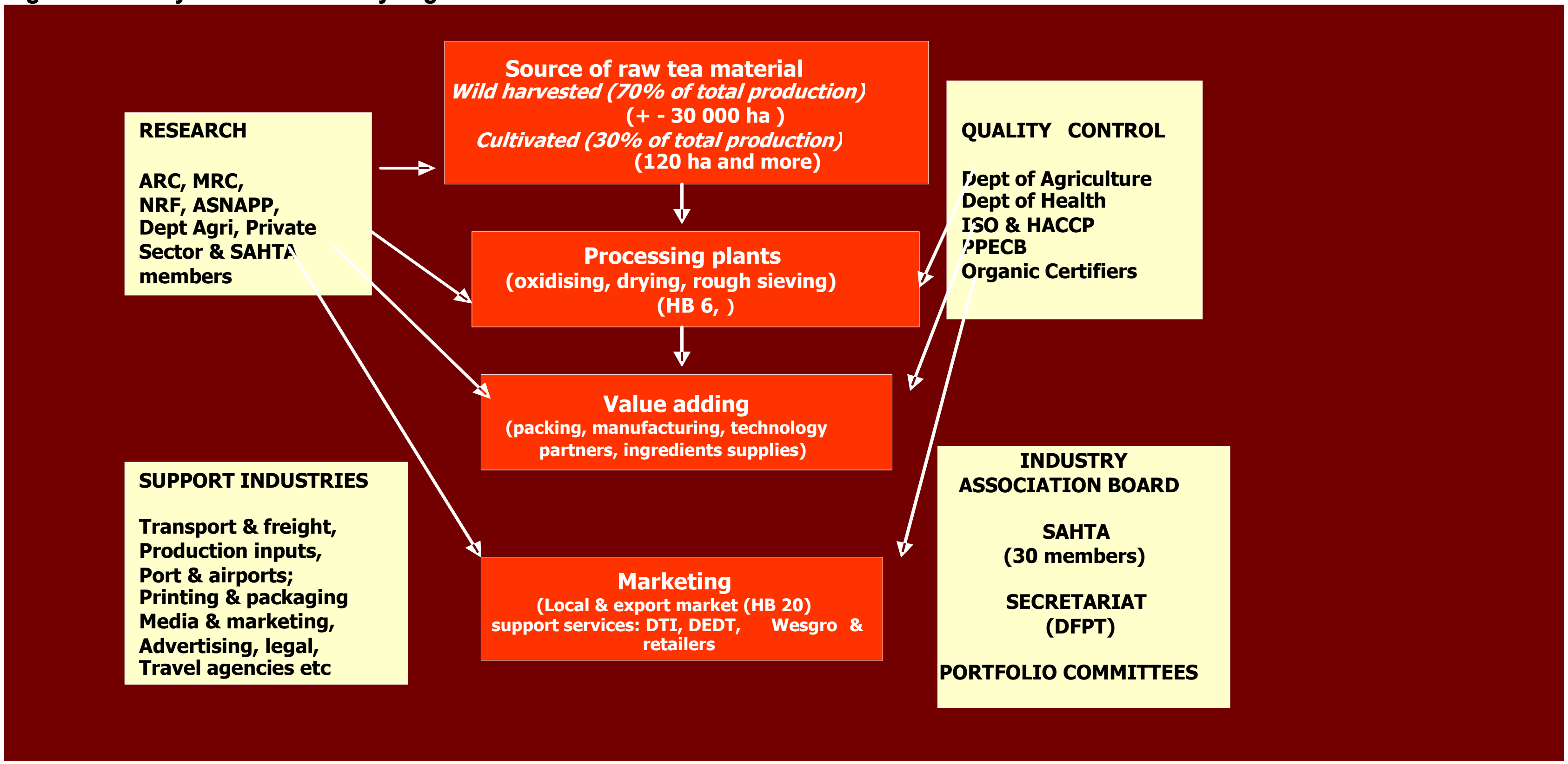
Batch rotary fermentation of moistened leaves and stems at temperatures between 70 and 85 degrees Celsius is currently the practice. Fermentation time varies between 18 to 60 hours, depending on temperature and species. After fermentation the tea could be dried in the rotary unit as well, but sun-drying is mostly preferred as it does not require specialized equipment, and it involves no heating costs.

It usually takes 1-2 days, depending on the thickness of the layer as well as the prevailing weather conditions, for the tea to reach a final moisture content of 10% or less.

5. INDUSTRY ORGANIZATION

Depicted in Figure 3 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 during 2012:

Figure 2: Honeybush tea industry organization



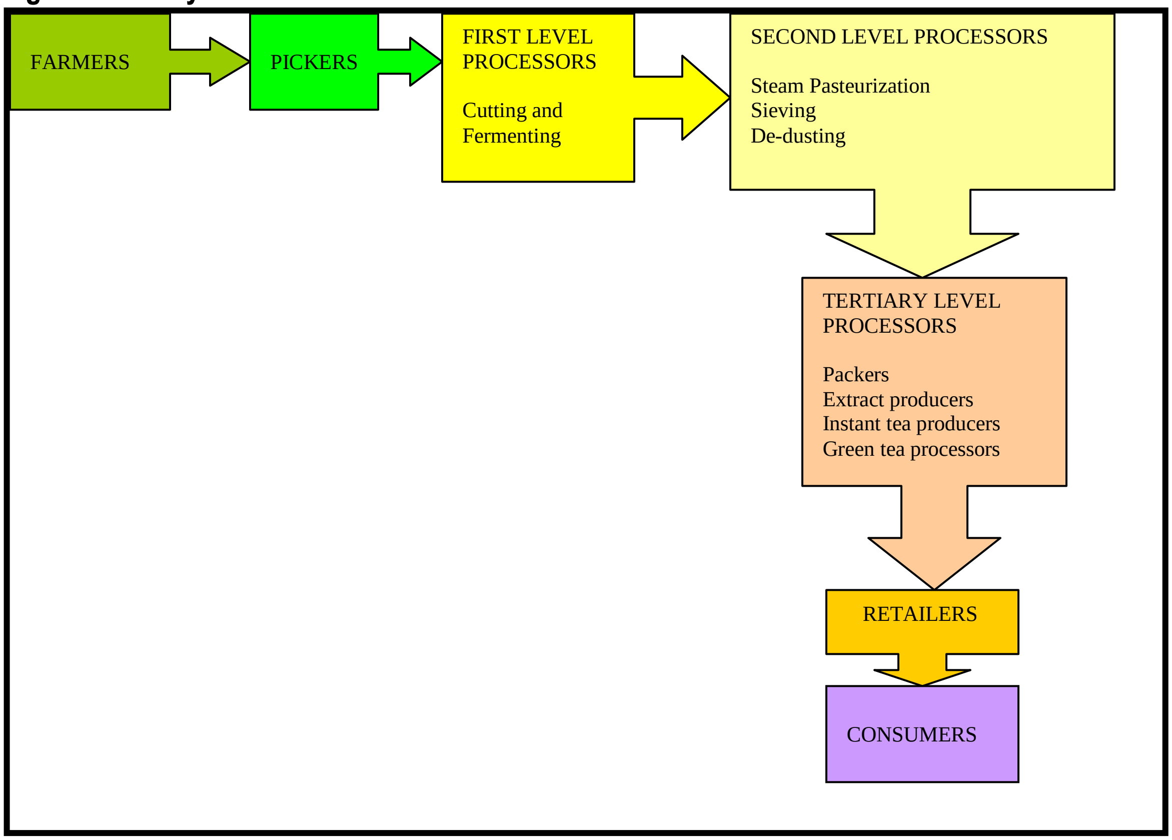
Source: SAHTA

Figure 2 above indicates the structure of the honeybush tea industry between 2010 and 2011 period.

6. MARKET VALUE CHAIN

The honeybush value chain (see Figure 3) 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.

Figure 3: Honeybush tea market value chain

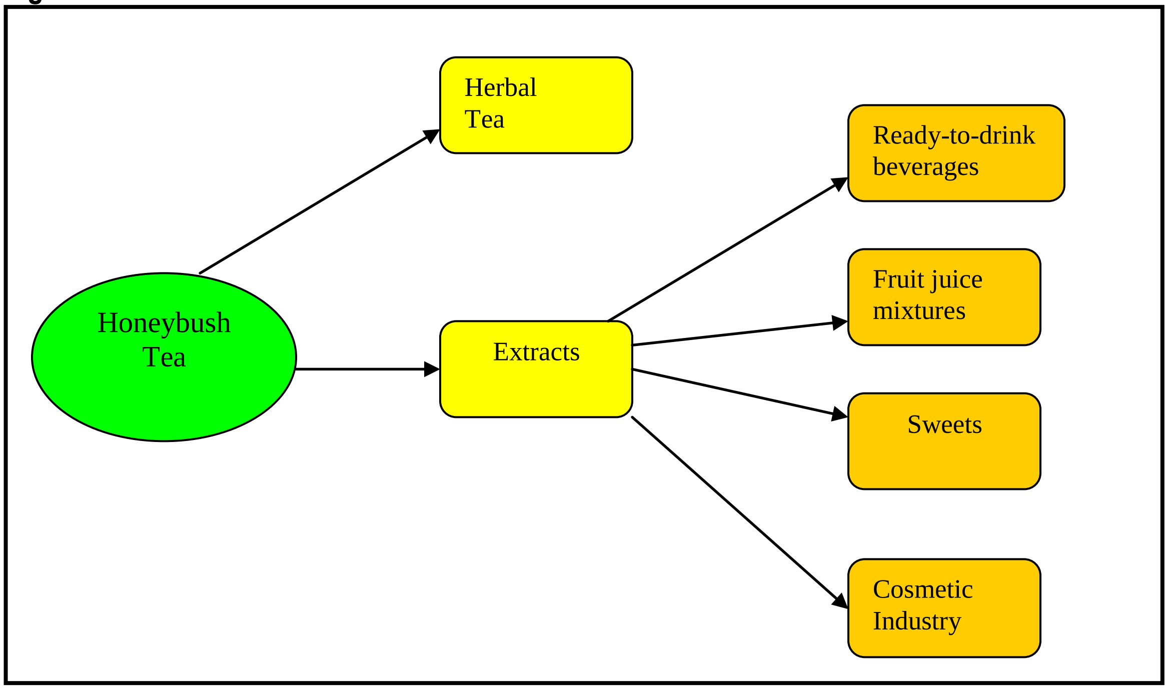


The honeybush value chain further comprises a number of businesses, both large and small, who are all dependent on each other in the chain to make their businesses succeed. Experience has shown that the future success of the honeybush industry depends on the extent to which it succeeds in managing the 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 honeybush 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 4: 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.

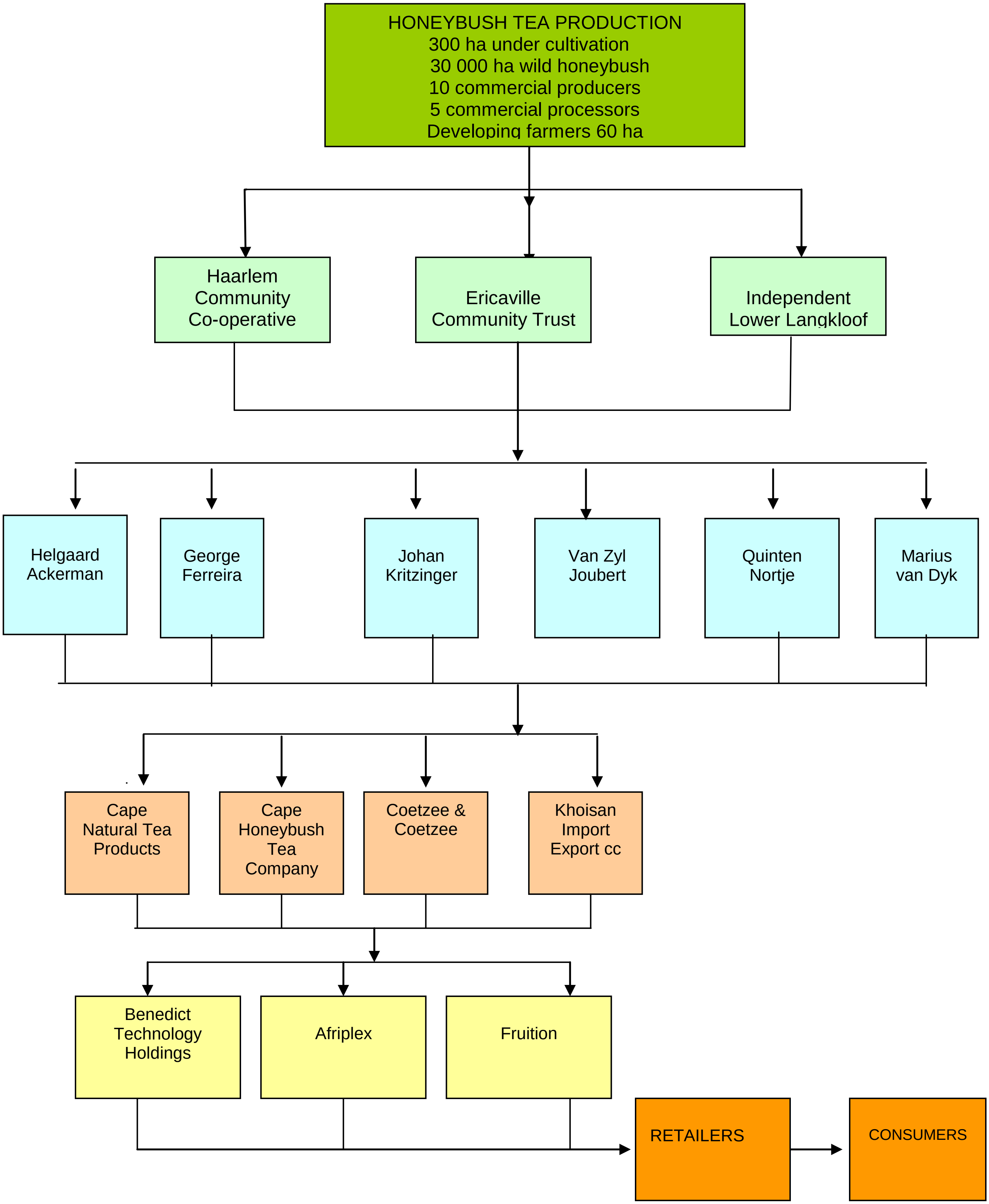
10. CHALLENGES

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.

Figure 6: Honeybush tea value chain players.



11. ROLEPLAYERS IN THE HONEYBUSH TEA INDUSTRY

11.1 PICKERS

11.1.1 Haarlem Pickers
Tel: 082 802 4822

11.1.2 Erikaville Agricultural Trust
Tel: (044) 385 0354

11.1.3 Independent Lower Langkloof Pickers.

11.2 FIRST LEVEL ROCESSORS

11.2.1 Helgaard Ackermann
PO Box 113
Humansdorp
6300
Tel: (042) 295 1513

11.2.2 Jan-Andries & Helmien Beyers
PO Box 46
Herold
6615
Tel: (044) 888 1733.

11.2.3 Towen Ferreira
PO Box 115
Joubertina
6410
Tel: (042) 273 2218

11.2.4 Godfied & Erika Kritzinger
PO Box 26
Misgund
6440
Tel: (042) 275 1601

11.2.5 Johan Kritzinger
PO Box 90
Louterwater
6435
Tel: (042) 275 1784

11.2.6 Scheltema Nortjie
PO Box 30
Kareedouw
6400
Tel: (042) 288 0203

11.2.7 Laurie Strydom
PO Box 579
Riversdal
6670
Tel: (028) 713 2987

11.2.8 Pierre Taljaard
Cape Honeybush Tea
PO Box 1988
Mosselbay
6500
Tel: (044) 697 7070.

11.3 SECOND LEVEL PROCESSORS

11.3.1 Cape Natural Tea Products
Tel: (021) 951 3132
Contact Person: Dawie de Villiers
E-mail: capenat@new.co.za
Website: www.rooibostea.co.za

11.3.2 Cape Honeybush Tea Company
Tel: (044) 697 7070
E-mail: carol@capehoneybushtea.co.za
Website: www.capehoneybushtea.co.za

11.3.3 Coetzee & Coetzee
Tel: (021) 905 1318
Contact Person: Neill Coetzee
E-mail: info@coetzeeltd.co.za
Website: www.coetzeeltd.co.za

11.3.4 Khoisan Import Export cc
Tel: (021) 421 3444
Contact Person: Peter Schulke
PO Box 32210
Camps Bay
8040
E-mail: agultrad@iafrica.com

11.3.5 HerbAfrica cc
Tel: (021) 788 6654
Contact Person: Astrid Moehrke
PO Box 35
Muizenburg
950
E-mail: honeybush@mweb.co.za
Website: www.HerbAfrica.com

11.3.6 Trophy Tea Distributors
Tel: (023) 626 4024
Contact person: Louis van Coppenhagen
PO Box 32
Robertson
6705.

11.4 TERTIARY LEVEL PROCESSORS

11.4.1 Benedict Technology Holdings
Tel: (021) 882 9300
Contact Person: Schalk de Beer
E-mail; schalk@benedict-tech.co.za

11.4.2 Afriplex
Tel: (021) 872 4976
Contact Person: Riaan van Breda
PO Box 3186
Paarl
7620

11.4.3 Fruition
Tel: (021) 873 3101
Contact Person: Grant Momple
PO Box 505
Wellington
7650
E-mail: grant@fruition.co.za
Website: www.fruition.co.za

12. ACKNOWLEDGEMENTS

The following organizations are acknowledged:

South African Honeybush Tea Association
Tel: (012) 788 6654
E-mail: honeybush@mweb.co.za

Perishable Products Export Control Board
P.O. Box 15289
Panorama
7506
South Africa
Tel: (021) 930 1134
Fax: (021) 939 6868
Website: www.ppecb.com
E-mail: ho@ppecb.com

Cape Honeybush Tea Company
P.O. Box 1988
Mosselbay
6500
Tel: (044) 697 7070
Fax: (044) 697 7080
E-mail: info@capehoneybush.co.za
Website: www.honeybushtea.co.za

Directorate: Statistics and Economic Analysis
Department of Agriculture, Forestry and Fisheries
Private X 246
Pretoria
0001
Tel (012) 319 84 54
Fax (012) 319 8031
www.daff.gov.za