



NATURAL PRODUCTS ASSOCIATION OF BOTSWANA BIRD'S EYE VIEW

Morula Value Chain

“If you are going to live, leave a legacy. Make a mark on the world that can not be changed”

Maya Angelou



WHO WE ARE

The Natural Products Association of Botswana or NPAB is an Association that represents the Indigenous Value Chain in Botswana.

The Association was formed in 2017.

The Association elected an Executive Committee in January 2023.

NPAB Services include:

Lobbying retailers on your behalf for market access.

Trying to secure group pricing to bring your costs down.

Coordinated sector-level strategies for Industry Development.

Working with partners to help small businesses to prepare for local and export.

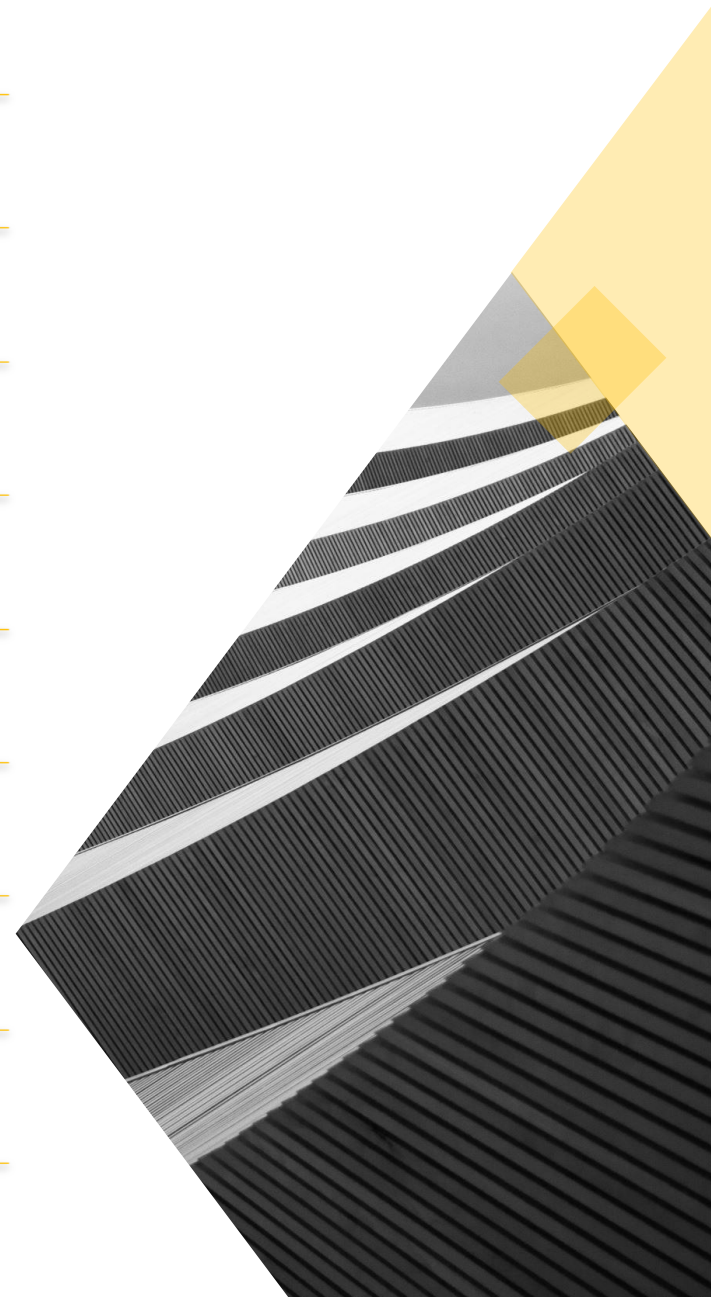
Lobbying and advocacy to support development of policy that benefits you.

Providing you with access to Training and technical support.

Assistance with standards development and compliance, from individual ingredients to packaging.

IP Support Initiatives

SME capacity building with our strategic partners.



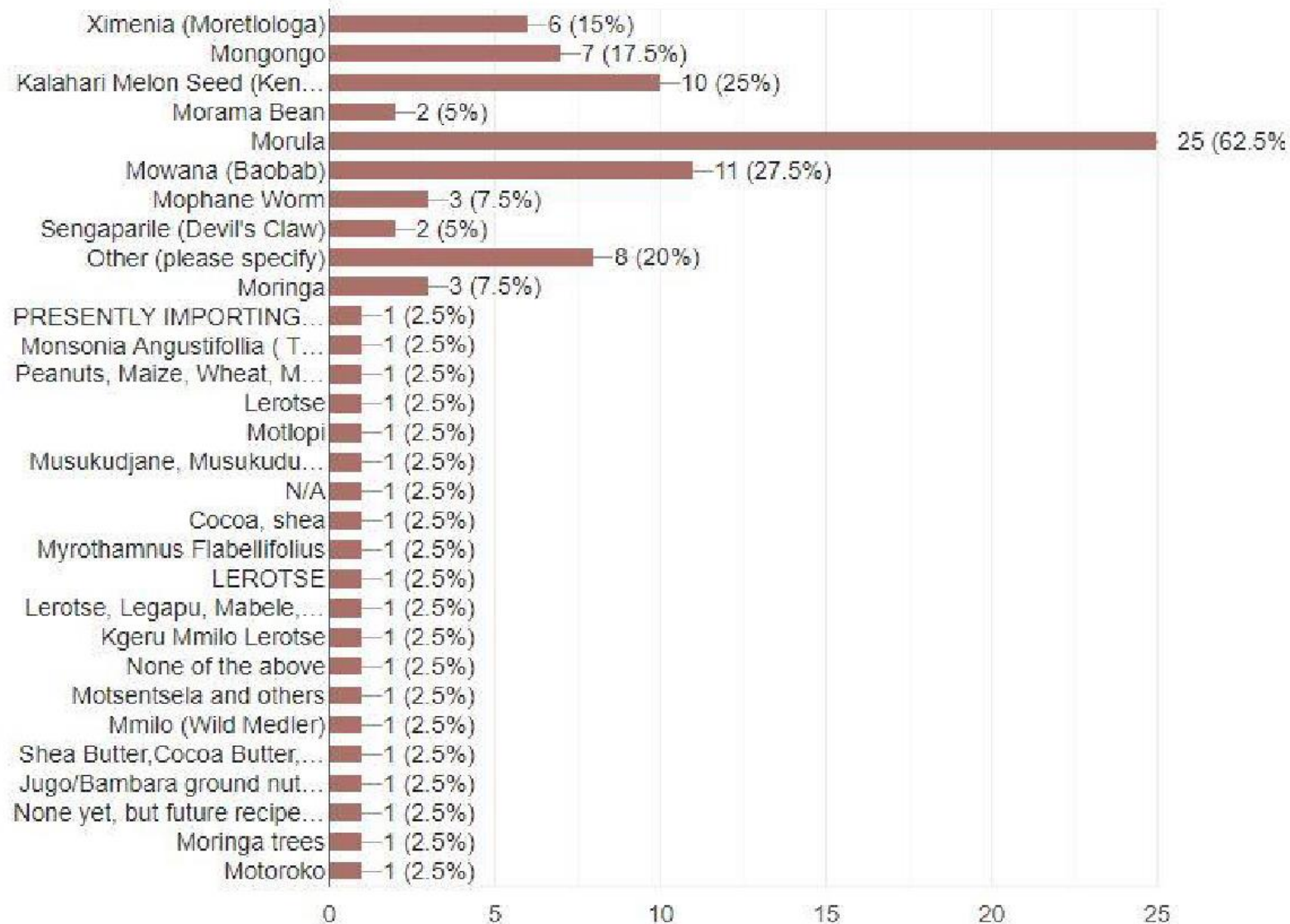


Membership BREAKDOWN

THE NPAB HAS APPROXIMATELY 50 MEMBERS INVOLVED IN THE FOLLOWING SECTORS:

- Indigenous ingredient processors (e.g. Mongongo oil, Morula fruit pulp and oil) etc.
- Cosmetic Product Manufacturers (multiple skincare products and haircare products)
- Agri-processing of Indigenous Food and Beverage Products (e.g. Mophane worm snacks, Morula Drinks, Morula Jam, Morula Hot Sauce, Baobab Jam).
- Manufacturing Medicinal and Health Supplement products (Hoodia, Donkey Milk, Devils Claw etc.).
- Organic Fertilizers.
- Indigenous Crop Farmers (e.g Ditloo, Morama Bean).
- Basketry using Veld Resources.

Member Resource Use Breakdown



Morula Value Chain

History, activities and Profile



Morula Tree Characteristics

The Morula tree (*Sclerocarya birrea*) is vital to Botswana's agriculture and economy, distinguished by these key traits:

Climate Preferences: Morula is found in various Regions in Botswana, but the primary commercial Regions are the Tswapong Region and the Southern Region.

Climate Preferences: Thrives in warm, frost-free climates, making it perfect for Botswana and Southern Africa.

Salt Tolerance: Highly tolerant of salty soils, allowing it to grow in diverse soil types.

Annual Yield: Produces approximately 700 kg of fruit per tree each year, supporting various products like jams, juices, oils, and cosmetics.

These traits highlight the Morula tree's ecological importance and its potential to drive sustainable economic growth in Botswana.

Morula Value Chain Economic Potential

- The fruit and oil from the Morula tree are integral to producing a variety of food products like jams, juices, and hot sauces, as well as cosmetics such as moisturizers and oils.

Boosting Local Economies:

- The cultivation and processing of Morula products can significantly boost local economies. For instance, a single Morula tree yields approximately 700 kg of fruit per year. With an estimated 2 million trees in Botswana, this translates to 1.4 million tons of **potential** fruit harvest. Processing just 5% of this yield could generate around 70,000 tons of fruit products, substantially increasing economic activities and local revenue.

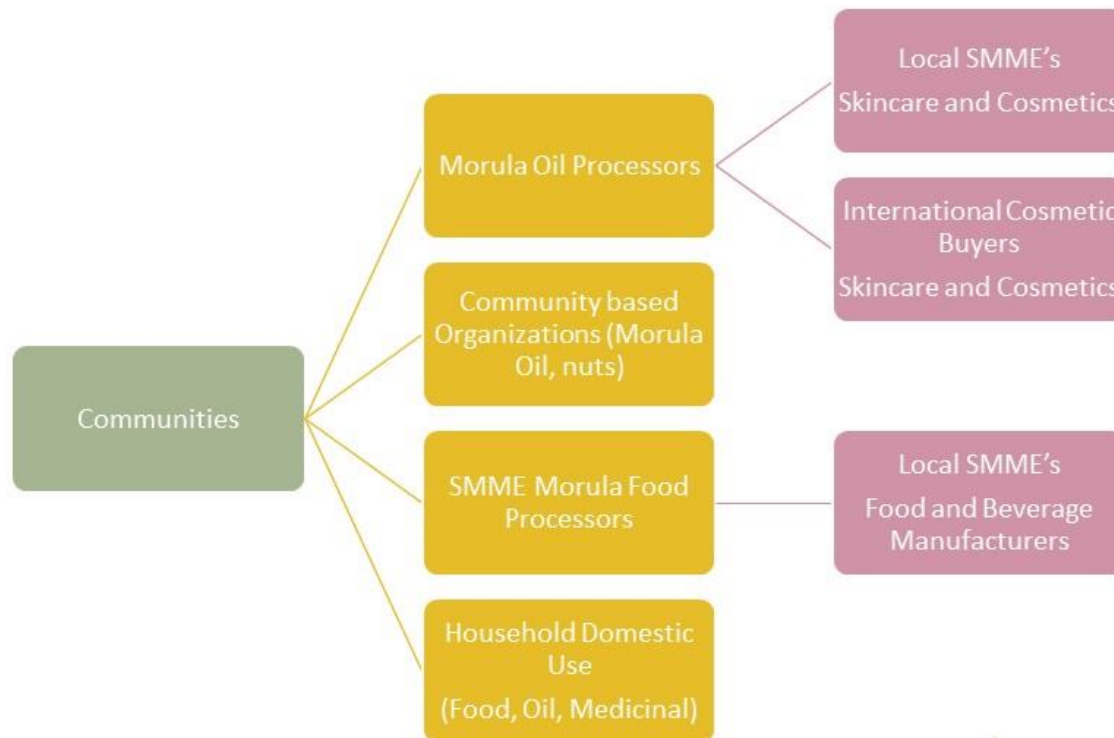
Job Creation:

- Most Value Chain actors historically either process their own morula with communities or get their Morula fruit oil and or fruit from oil processors in Gabane or Phikwe.
- The Morula value chain generates significant employment opportunities, particularly in rural areas. It's estimated that the industry employs over 1,000 harvesters, with 90% of these jobs held by women.



MORULA VALUE CHAIN IN BOTSWANA OVERVIEW

Botswana Morula Value Chain





NPAB Member Morula Product Examples



COMING TO
SOUTH
AFRICA

Launching on
takealot com

FRIDAY 1ST OCTOBER 2021



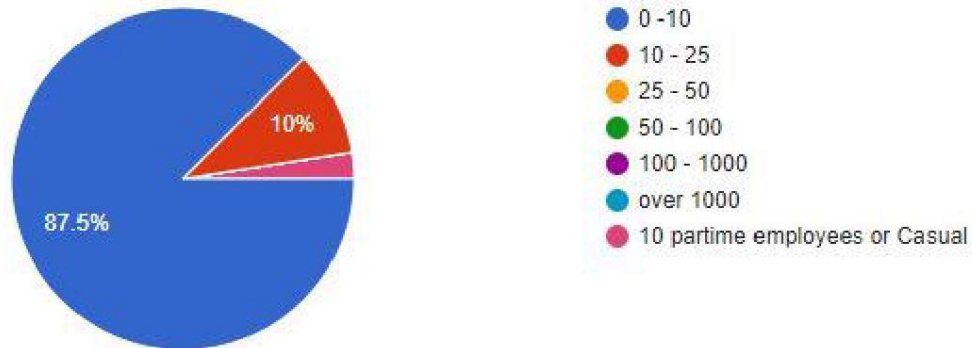
NPAB Member Products Cont.



Job Creation Profile

How many employees do you have?

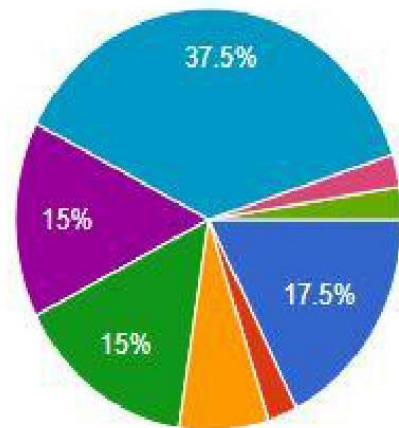
40 responses



Breakdown by Gender

What percentage of your employees are women?

40 responses

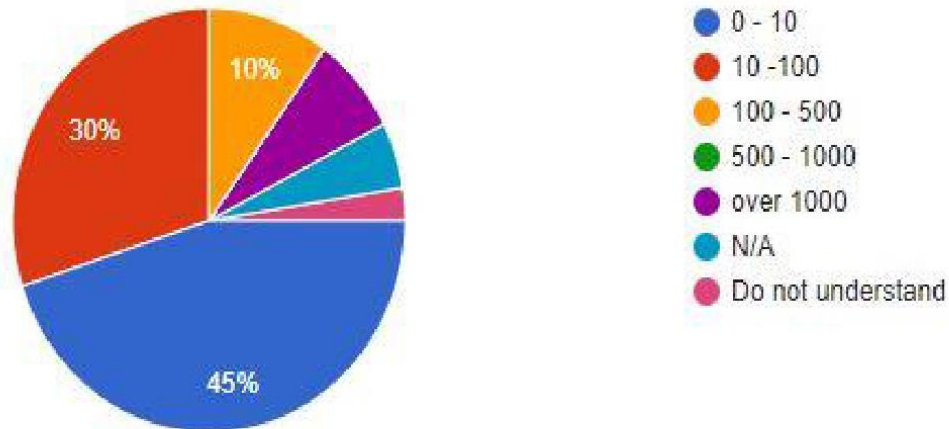


- 0 - 10 percent
- 10 - 25 percent
- 25 - 50 percent
- 50 - 75 percent
- 75 - 90 percent
- over 90 percent
- 100 percent
- I am currently doing the job, and always hire 2 ladies for temporary basis

Value Chain Analysis

How many people do your value chain partners employ?

40 responses



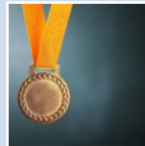


MORULA VALUE CHAIN SPOTLIGHT



Focus: Sustainability and innovation in food manufacturing

Products: Award-winning jams, syrups, hot sauces, and fruit rolls



18 awards

95% 5-star Amazon ratings

Endorsement from Martha Stewart



Available in 50 stores across Botswana

Exporting to USA and Zambia

Supplies Air Botswana



Air Botswana: Maungo Craft's Morula Juice is currently being served on Air Botswana flights.



Value Chain: Maungo Craft has worked with oil processors in its value chain. Starting next year, it will work directly with communities to source Morula.



HACCP: Maungo Craft is the only company in Botswana's Natural and Indigenous Industry with a Food Safety Qualification (HACCP) as of 2023.



Media: Maungo Craft has been featured on various media platforms, including BBC, CNN, and Bloomberg Magazine.



OPPORTUNITIES

Economic Diversification (Food, Beverages, Cosmetics, Animal Feed, Fertilizer, Biofuel etc.).
Climate Change Adaptation strategy.

Developing the Rural economy.

Improving livelihoods and living standards in Botswana.

Improving soil quality through planting trees and Intercropping.

Creating Green Industries in Botswana.

Improving and developing Standards in Food and Cosmetics.

Developing new Markets.

Developing Intellectual Property (Geographical Indicators).



CHALLENGES

There are various challenges facing the Industry on the ground such as:

- Lack of Testing facilities
- Lack of Support Industries
- Lack of Financing schemes to develop industry, particularly Grant Funding Institutions
- Lack of Infrastructure, particularly incubation facilities
- Market Development/ Marketing
- **Different Stakeholders working in silos**
- Regulatory Challenges
- Short Term Supply Chain Issues (Seasonality of fruits)
- Lack of adequate cold storage units
- Lack of adequate fruit processing equipment

INDUSTRY NEEDS

An Audit By Government Partners to find Gaps and blockages to effectively carrying out commercialization and addressing them.

Incubation Centers to allow for more companies to be incubated.

Funding to Establish a Secretariat for the NPAB to improve administrative efficiency.

Funding partners to establish a **Natural and Indigenous Grant Fund**.

An Intellectual Property Support Fund to develop IP around Natural and Indigenous Resources.

Sector Specific trade finance from Private and Public Funders. Creating funding instruments that risk seasonal harvesting and other Sector Specific needs.

Marketing support/ Market Development for Natural and Indigenous products and the Industry in the local and international market.

Affordable Logistics from Logistics companies. Effective rates to enable economic growth.



**“ IT ALWAYS SEEMS
IMPOSSIBLE
UNTIL IT’S DONE. ”**

- NELSON MANDELA

