



# FAIR TRADE TOILETRIES FOR THE NAMIBIAN HOSPITALITY INDUSTRY

REPORT FOR THE DIRECTORATE OF ENVIRONMENTAL  
AFFAIRS, MINISTRY OF ENVIRONMENT AND TOURISM

IN COOPERATION WITH



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# 1 BACKGROUND INFORMATION

This report is as a result of the Ministry of Environment and Tourism (MET) seeking to explore new opportunities of adding value to Namibia's biodiversity in order to contribute to the sustainable management of natural resources, rural development and economic growth. The initiative is supported by the German Development Cooperation through the GTZ/MET project "Sustainable Natural Resource Management", and by MET's "Integrated Community-based Ecosystem Management (ICEMA)" project (FFEM-funded "High Value Plant Species" sub-component).

On 28th of April 2006 a Workshop on "Exploring new biodiversity-based income opportunities through bio-trade and bio-prospecting" was organised by MET, in order to get consensus about priority products to be taken forward particularly in the context of the Ministry's Community-based Natural Resource Management (CBNRM) programme. Among the products prioritised were "fair trade toiletries" made with raw materials sourced from Namibian primary producers. The main marketing idea is to produce single-serving packs of a range of high quality toiletry products for use in Namibia's hospitality establishments. These toiletries would be promoted as 'fair trade (ft)' products benefiting Namibian primary producers, especially organised groups involved in CBNRM, and could replace imported products of any label in actual use.

The use of fair trade toiletries could initially result in higher costs for Namibian hotels, lodges and guesthouses, since quality products produced on a relatively small scale are likely to be more expensive than mass-produced industrial equivalents. However, these higher expenses may be compensated (cross-subsidised) by selling bigger packs of the same products to tourists through craft outlets at lodges or elsewhere.

The feasibility of the production of a Namibian fair trade toiletries range and the price of the final product will ultimately depend on the amount of goods purchased and the commitment of hospitality establishments to buy the products. Once the depth of the commitment from interested markets has been estimated, various models of manufacturing and packaging of the toiletries range needs to be assessed in terms of the cost implications, also the potential contribution to income generation for rural households of organised CBNRM groups.

Objectives: the objectives of this consultancy have been determined as:

- To quantify the requirements of the hospitality industry for toiletries
- To assess the commitment of the Namibian hospitality industry to buy a Namibian fair trade toiletries range.
- To develop different models for the value chain (i.e. supply of indigenous oils, manufacturing, packaging, supply of the required volume of products to hospitality establishments) and assess:
  - the respective cost implications and prices for toiletries
  - the distribution of benefits/profits along the value chain
  - the benefits accruing for organised CBNRM groups

## **2 THE CONCEPT OF FAIR TRADE**

The term “Fair Trade” was originally used by those who supported the concept of social justice, which can be defined as the belief that justice would be determined by whatever the strongest thought it should be. This is specifically intended to identify the relationships between different aspects of international trading and some of the reasons it became necessary to put some constraints on the products that are being traded.

This led to the establishment of the “Fair Trade” concept, by a group of wholesalers, retailers and producers, alternatively known as fair trade organisations (FTOs) who are committed to providing increased income leading to fair wages and good employment opportunities to economically disadvantaged artisans and farmers worldwide.

Low-income producers are linked with consumer markets whilst consumers are educated about the importance of purchasing fairly traded products. By adhering to social criteria and environmental principles, FTOs foster a more equitable and sustainable system of production and trade that benefits people and their communities, therefore, providing living wages and healthy conditions for workers in the developing world ([www.fairtrade.org.uk](http://www.fairtrade.org.uk)).

The “Fair Trade” concept is fairly unknown to the Namibian business community. However Team Namibia is promoting a similar concept under the banner of Naturally Namibian. This organisation is promoting Namibian produced products, mainly locally; however an export promotion drive does exist with emphasis on the SADC countries. Strict quality control measures, especially for manufacturing concerns, are in place for companies who join this organisation. A core value of the organisation is to promote Namibian products as high standard and good quality goods. This organisation is well known to the business community in Namibia. Appendix 5 provides some extracts from the Team Namibia website ([www.teamnamibia.com](http://www.teamnamibia.com)).

Pewa Hair Products and Body Lotions, a company that has been identified as a potential Namibian manufacturer, is currently a member of Team Namibia. As part of this consultancy she has been asked to forward a company profile to the consultant, which she failed to do.

## **3 METHODOLOGY APPLIED**

The consultant commenced with this study by familiarizing himself with the report by Mr. P. du Plessis (2006) “Promotional strategies for Marula food oil and fair trade toiletries”.

As a second step he contacted the Hospitality Association of Namibia (HAN) to obtain statistics of the tourism industry. However it was found that these statistics only represented the HAN members and, therefore, further statistics were obtained

from the Namibia Tourism Board (NTB) as these include all Hospitality Institutions in Namibia.

The draft questionnaire formulated by GTZ was finalized as suggested (Appendix 2) and used during personal interviews with the major game players identified in the Terms of Reference (ToR; Appendix 1) with some additions. As instructed by the ToR and due to previous experiences the consultant insisted on primary interviews, as much information is lost by just completing a questionnaire and returns are normally at a very low rate.

Individual appointments have been made with the various institutions, however many institutions preferred to complete the interview telephonically or by e-mail as they were too busy to see the consultant or are restricted in purchasing goods locally. Others have procurement systems in place where purchases are done directly by the various institutions and, therefore, these are concluded out of Windhoek.

Section 4 of this document provides detailed information in respect of these interviews and the table attached in Appendix 6 provides a summary of the interviews.

The only interview that could be arranged with the various wholesalers stipulated in the terms of reference was with African Marketing. However, more amenities are being sold by African Catering, a sister company, which represents Hotel Amenities Suppliers in Johannesburg. The other suppliers have been interviewed telephonically, including two possible Namibian manufacturers.

## 4 VISITATION RESPONSE

The general perception of most organizations especially those under Namibian management, were very positive towards giving support to Namibian manufacturers.

All have indicated that the products must comply with the following requirements:

- Products must have information pamphlets attached to it referring to its origin etc.
- Products should have some Namibian specific raw material as content.
- The promotion of the rural pure must be a predominant feature on the pamphlet.
- Quality standards must be coherent to international standards and consistent.
- Supply must be consistent.

### **Safari Hotel** – Contact Person Mr. Frans Sutil

After many attempts to arrange a meeting with Mr. Sutil he finally agreed to meet the consultant. On the arrival of the consultant Mr. Sutil advised that he had a crisis at hand and could not attend the meeting but had arranged for Ms. Kirsten Howard to represent him. Fortunately, from numerous phone calls trying to arrange a meeting, most issues had been partly discussed and answered.

Ms. Howard has only been in the employ of the Safari for a short period and therefore had a limited knowledge regarding the hotel, including the products issued to clients. She agreed to pose various questions to management who provided very vague answers. However she took it upon herself to answer the questions in more detail.

The number of bed nights sold per annum and the price paid for amenities could not be provided as management felt this to be confidential information. During the conversations the consultant established that the cost of a 25g bar of soap is N\$0.87, this coincides with other organizations. However it does not coincide with the prices obtained from Hotel Amenities Suppliers in Johannesburg (R1.11 excluding delivery).

The Safari operates as two separate facilities, the Safari Hotel is classified as a 3 star hotel and the Safari Court Hotel is classified as a 4 star hotel. Different amenities are issued for each facility. However both provide a 25g bar of hand soap on the wash basin and a 50g bar of soap at the bath tub, whilst the Hotel supplies a 15ml Shampoo Sachet and the Court supplies Shampoo and Conditioner in small bottles. Additionally the Safari Court offers Shower Gel and Body Lotion, with considerations being given to supply the same in the Safari Hotel.

Together, both Hotels have four hundred and fifty one (451) rooms, which include 8 Luxury Suites and 1 Presidential Suite, availing approximately one thousand (1000) beds. Taking into consideration the HAN statistics (31.18% on average) of bed night occupancy in the central region of Namibia, this translates to approximately one hundred and thirteen thousand eight hundred (113 800) bed nights sold per annum.

The Safari management is in favour of supporting Namibian manufactured products, especially those produced from our natural resources, with the following requirements:

The products must be branded as Safari Products, packaging would be sufficient, thus no specific formulation is required.

The product name, for instance "Ubuntu", could be promoted on the packaging as long as the Safari Brand features primarily.

The price may not be more expensive than the current products purchased from the current supplier Hotel Amenities, situated in Johannesburg South Africa.

Although a small outsourced shop exists at the Safari Hotel reception, it only stocks emergency goods such as toiletries and it is felt that the bigger quantities of the products on offer will not sell from this shop.

**Namib Sun Hotels** – Contact person Ms. Natali Ahrens

Mr. Brian Batson has left the services of the Namib Sun Group therefore the interview was conducted telephonically with Ms. Natali Ahrens who was introduced to the consultant as marketing manager. Ms. Ahrens was very cautious in speaking to the consultant as the hotel group is currently negotiating a management agreement with a Germany based International Hotel Group, known as the Kempinski Hotel Group and she felt this information could harm the negotiations.

Currently all hotels within the group are providing hand soap, hair shampoo and body lotion in small containers for their guests. Each facility is responsible for purchasing their individual supplies. However, they are guided by the O&L procurement department.

The group sells on average fifty thousand (50 000) bed nights per annum.

**Namibia Country Lodges** – Contact person Ms. Ilse de Wet

The various facilities owned and or managed by Namibia Country Lodges are responsible for their own procurement. In principle the Windhoek Head Office would have no objections to the purchase of Namibian produced toiletries and also in instructing the various facilities to do so. The requirements would be the same as the general requirements mentioned above. They would consider buying products at slightly higher prices than they currently pay.

The group consists of seven lodges spread all over the country. Each lodge has been requested to complete the questionnaire, with the response as indicated below, unfortunately only two managers have responded. The other managers have promised on telephonic follow up calls that they will complete the questionnaires but to date have failed to do so.

The total capacity of all the lodges is four hundred and thirty eight (438) bed nights and they have an occupancy rate of 37.87% (HAN Statistics) per annum. This calculates to approximately sixty thousand four hundred (60 400) beds sold per annum.

- Auob Country Lodge – No Response	26 Rooms / 50 Beds
- Solitaire Country Lodge – No Response	25 Rooms / 50 Beds
- Twyvelfontein Country Lodge – No Response	56 Rooms / 112 Beds
- Oshakati Country Hotel – No Response	45 Rooms / 90 Beds
- Opuwo Country Hotel	22 Rooms / 44 Beds
- Namushasha Lodge – No Response	27 Rooms / 52 Beds
- De Duine Hotel	20 Rooms / 40 beds

The Opuwo Country Hotel provides hand soap and shampoo to their guests. The hand soap is provided in bars at approximately N\$1.00 per bar of soap, whilst the shampoo is bought in bulk at N\$300 per 25 L container. Considering the estimate of 15ml used per customer daily, the cost thereof would be N\$0.18 per guest per day. The manager Mr. Robert Golbach is very interested in supporting Namibian produced products. He does not see any potential in selling bigger packs of the toiletries in his souvenir shop.

The de Duine Hotel provides hand soap and insect repellents for their guests. The provision of repellents contradicts information gained from other companies as this hotel maintains that the products are left in the rooms and disappear only very seldom. The soap is purchased from Herco Marketing in Walvis Bay, an affiliate company of African Marketing, at N\$0.94 per 20g bar of soap. The manager Mr. Willem Siemens would gladly pay up to 30% more for Namibian products as this would support the home market.

**Gondwana Desert Collection** – Contact person Mr. Manni Goldbeck

It was an enlightening experience of enthusiasm and positive perception to visit Mr. Goldbeck and the procurement manager Mr. Erno Bertolini.

Currently the Gondwana Desert Collection facilities supply liquid soap in dispensers to their guests. The lodges would be very interested in selling the toiletries in their souvenir shops, provided that the products are adequately identified including promotional tags explaining their origin. Caution must be given to quality, consistency of supply and cost effectiveness. The organisation would support any products of Namibia as priority products and, therefore, would be willing to pay up to 30% more for the products.

The current number of bed nights sold by the various Gondwana Desert Collection facilities are approximately seventy five thousand (75 000) per annum. At an estimated average consumption of 50ml soap per bed night sold, this calculates to approximately 3 750L, or, 150 x 25L containers (at a cost of N\$186.00 per 25L). The soap is purchased from Pupkewitz Catering Supplies. Mr. Goldbeck is adamant that the quality of the product must be superior if it could be endorsed by a European organisation it would be better. The concern about consistency in delivery and price was highlighted as a potential failure to the projects.

The general opinion is that any Namibian CBNRM product would sell, especially home brewed products such as Marula Schnaps, Marula Wine, even the traditional homebrew, however, these must be brewed under strict hygienic conditions and in compliance with the liquor laws of the country.

**Leading Lodges of Africa** - Contact person Ms. Anita Witt

Ms. Witt is involved in administration and referred the consultant to Mr. Walter Schiebler the operations manager. This organisation is enthusiastically willing to purchase Namibian produced goods. Mr. Schiebler, through the Chief Executive Officer Mr. Werner Betties, has requested to purchase Marula Oil as massage oil immediately.

Currently they are providing Dr. Eckstein products for their guests, Mr. Schiebler would not give details on pricing, although he indicated that they are imported from Germany and are definitely on the more expensive side. The products are purchased directly from Salon Faces in Ludwigsdorf and delivered to the various lodges from their internal procurement department in Windhoek.

The group has in total 8 lodges of which 6 are in operation. The outstanding two are currently undergoing renovations. The total bed nights sold per annum for these 6 lodges are approximately one hundred and two thousand two hundred (102 200). All rooms are provided with hand soap in dispensers and a bar of soap, plus hair shampoo and body lotion in dispensers. All liquids are supplied in 2 or 5L containers due to control purposes.

**Namibia Wildlife Resorts** – Contact person Mr. Sebulon Chicalu

The consultant did not manage to physically see Mr. Chicalu, the current marketing manager, as he was trying to arrange a meeting between himself, the consultant and Mr. Pierce le Strange, the new projects manager. Unfortunately he did not manage to arrange such a meeting as Mr. le Strange is mainly out in the field.

NWR does not supply any amenities to their guests. However, Mr. Chicalu was very positive that this could change in the near future. Currently investigations are underway to establish the financial impact to NWR in offering such amenities to their guests, this is at a very early stage and he would not like to commit himself to anything as yet.

NWR would strongly consider stocking Namibian produced toiletries in the various souvenir shops.

**Windhoek Country Club and Resort** – Contact person Mr. Tony Boucher  
Mr. Boucher would not see the consultant as he is part of the legacy group and therefore is restricted to buying all the hotel supplies from South Africa.

**Walvis Bay Resorts** – Contact person Mr. Frank Löhnert  
This company is in the process of being dissolved, therefore, Mr. Löhnert does not see it as appropriate to change the status quo, however, in general he supports the idea very much and indicated that he would be open to purchase Namibian produced goods, even at a higher price.

**Southern Sun Hotels** – (Kalahari Sands Hotel)  
This Hotel is owned and managed by a South African Group and therefore restricted to purchasing their goods through South Africa.

**Protea Hotels** – Contact person Mr. Graham Howard  
This group is also linked to South Africa and therefore restricted to purchasing their supplies from South Africa.

## 5 POTENTIAL CONSUMPTION OF TOILETRIES

In addition to the proposed usage of the Hospitality Association of Namibia (HAN) statistics, it has been decided to utilise statistics provided by the Namibia Tourism Board, as not all operators are HAN members. However, the calculations made and the results obtained from these calculations have been discussed and confirmed by HAN.

A logical analysis of the Namibia Tourism Board Statistical Report for the year 2005 has yielded a handsome 2.2 million bed nights being sold annually, providing a lucrative market to any entrepreneur for further investigation (Annexure 6).

Namibia has in excess of nine hundred and fifty thousand (950 000) (NTB Statistical Report 2005) people entering the country annually, of these 88% (836 000) are tourists or business people, thus persons who would potentially make use of companies or organisations selling bed nights. However, 44% of these visitors are likely to stay with friends and/or relatives (VFR), thus people not making use of hotel/lodge accommodation.

It has to be assumed that 80% of the South African tourists camp in Namibia and, therefore, are not making use of accommodation facilities that would potentially provide toiletries.

Facilities that supply hand soap, estimate that each visitor uses approximately 50ml of liquid hand soap per day, or alternatively a 45g bar of soap per day. Most organisations, including the smaller B&Bs supply, as a minimum, hand soap in the rooms. Various reasons exist for switching over to bulk liquid soap dispensers in the rooms and public toilet facilities one of them being that according to international hygiene regulations new wrapped soap should be supplied daily, leaving a logistical nightmare of destroying the half used bar of soaps used in the rooms and secondly the discarded soap leaves a major environmental problem to lodge owners and the country in general. Another reason for switching to this environmental friendly method is the reduction in cost. In public toilets the problem is that bars of soap are removed, leaving the facilities constantly without soap.

As a second choice operators provide hair shampoo (15 – 25 ml sachets) usually as a combination with hair conditioner and the third product provided is skin lotion (15 – 25 ml sachets). However, these are mainly provided by the bigger South African owned/managed hotels and therefore are not accessible to Namibian products.

From the above figures it can be predicted that the total potential liquid soap used in the hospitality industry as 110 KL whereof the oil component is approximately 2 200kg at a 2% content. Unfortunately, approximately 317 000 bed nights are sold by South African franchised, owned or managed groups such as Protea Hotels, Legacy Hotels, Sun International, etc., who are excluded as potential users as it is compulsory for these organisations to make use of the general product purchased for the group at a discounted price due to bulk purchases. This reduces the potential of liquid soap used in the hospitality industry to approximately 94 KL whereof the oil content would be approximately 1 880kg at 2% content. Businesses such as the Namibia Wild Life Resorts do not supply any hand soap for the rooms. However, plans are underway to supply these products in future.

All Namibian game players that have been spoken too, without exception, have indicated that they would be extremely interested in buying Namibian Fair Trade Toiletries, providing the price is within budget, the quality is of high standard and supply is consistent. Taking these organisations into consideration, it can be assumed that approximately 352 000 bed nights are sold between them annually. If only liquid soap is produced for these institutions at 50 ml per person daily, a total of 17 600L would be used annually. The oil content at two percent would be approximately 350L.

This consultancy has investigated only approximately 30% of the bed nights sold in Namibia. Additional bed nights are sold by the smaller facilities, which potentially will purchase the Namibian produced products.

## **6 BENEFITS FOR ORGANISED CBNR GROUPS**

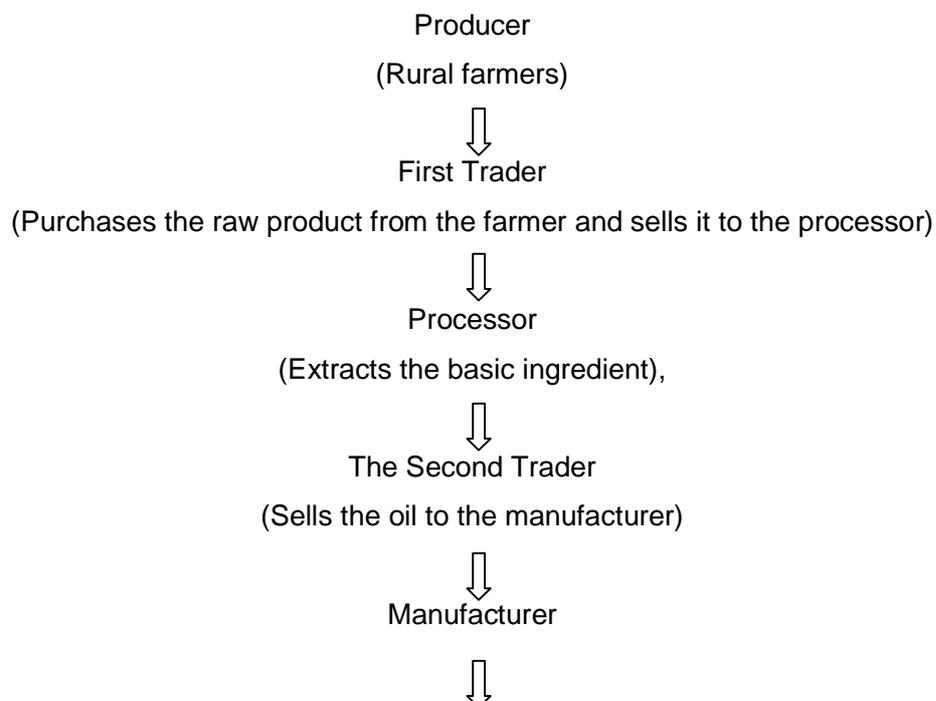
By establishing a manufacturing concern of Fair Trade Toiletries in Namibia, the aim is to protect and strengthen the supply of raw materials from Community Based Natural Resource Management Groups (CBNRM). Although many controversial arguments exist, it is the consultant's opinion that the communities' involvement will

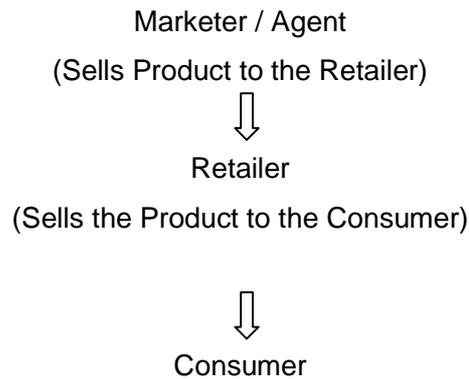
be far more secure if the manufacturing is undertaken in Namibia. The main objection against Namibian manufacturers originates from many bad experiences such as lack of interest, failure to supply products in time and sufficiently and inconsistent quality. It is imperative these issues are addressed and standards set. By establishing manufacturing concerns locally, not only will the rural community benefit, but much needed employment will be created.

The initial anticipated usage of raw materials will be minimal, however every litre of oil used will benefit the suppliers (rural community). Taking the total market into consideration the estimated initial 350L of oil could grow to a potential demand of approximately 1 900L, within the Namibian market. With exposure and time the products could be introduced to the International Market, in particular the Fair Trade market. It would be unjustified to make any assumptions of the size of this market, however, the Fair Trade market is known to be big and enjoying some tremendous growth.

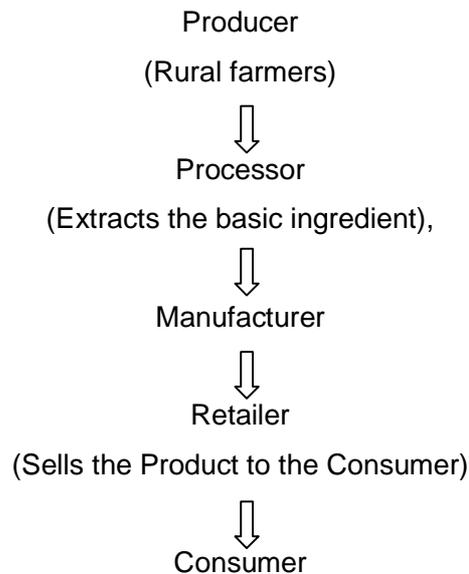
Value Chains of different companies and products differ substantially, although all are designed to identify the primary activities that create value for customers, therefore it is clear that the company affiliated with oil extraction will emphasize more intensively on the supply of the raw material whilst the company that distributes the soap will concentrate more on the supply of the soap. Should the soap be in fair demand but undersupplied or inconsistent in quality by the manufacturer the marketer will search for alternative suppliers, thus eliminating the original supplier and therefore the producer too the original supplier. This can be prevented by ensuring consistent supply at consistent quality.

The normal value chain would follow the route of;





This fairly outdrawn process leads to increased costs, by forming a cooperative the process is shortened drastically and therefore the end product can be sold cheaper. Considering the small amounts of oil traded, the optimum solution recommended would be as set out below, eliminating the various traders in the process.



In the case of Toiletries to the Namibian Hospitality Industry the retailer will be eliminated.

## 7 DISTRIBUTORS

The current company agents and distributors have indicated that they would be willing to stock the products. It is the preferred norm for Namibian manufacturers to do their own distribution. Considering the fact that many of the hotel or lodge groups are supplying the various facilities from their central depots in Windhoek, it would be advisable to follow the norm as the various groups are actually undertaking distribution themselves.

Various arguments do exist concerning the own distribution by Namibian manufacturing organizations, with the main emphasis being that Namibian manufacturers should concentrate on manufacturing and provide the agents with the opportunity of distributing the products. The advantage would be that most of these agents have existing customers, however they also normally stock more than one product range and for obvious reasons concentrate on the best selling products rather than pushing new products, unless these provide superior incentives.

## **8 CONCLUSION**

A potential market of 2.2 million units, of small hand soaps, liquid hand soaps, body lotions and hair shampoo, per annum will provoke many commercial businesses into investigating the opportunities further.

Taking into consideration the bed nights sold by organisations who indicated support to a Namibian product produced from our natural resources could be a starting point for a medium enterprise, allowing for future growth as demand increases. Should the Namibian manufacturers/suppliers be successful in providing these products to the hospitality industry, it is very possible that the South African managed/owned businesses will follow the trend. Alternatively, these companies could be forced, legislatively, to purchase Namibian produced products. As a third option, the manufacturing concerns could obtain infant protection for the products produced which should provide the organisations with a price advantage. Consideration must be given to the time factor involved in this lengthy and costly process of obtaining infant protection.

Care must also be given to maintain community involvement, should entrepreneurs visualize the market potential and have any doubt that it can be done by involving the community, entrepreneurs will proceed without the community.

## **9 RECOMMENDATIONS**

The Fair Trade concept is fairly unknown to Namibian institutions and therefore consideration should be given to supporting Team Namibia with the inclusion of the rural communities. This is mainly due to the fact that this organisation is known and no new concept has to be included.

It is recommended to include in the formula at least one Namibian endemic product such as the traditional Ovahimba perfume resin (*Commiphora wildii*), by means of this inclusion it is hoped to secure the continuity of community involvement. A proper, consistently well paid, supply channel of raw material as the Eudafano Women's Cooperative (EWC) must be secured for all endemic raw material supply channels.

Identify a Namibian manufacturer who would possibly be able to supply the demand and who would be willing to grow as the demand will grow. This organisation will have to commit themselves to the continuous support of the rural community, the

willingness to obtain various certifications, for instance the appropriate International Standards Organization (ISO) certification.

The process to be followed could be by advertising for an expression of interest from potential manufacturers, or by simply identifying such and thereafter evaluating these organisations.

The alternative option would be to involve a contract packer who would produce the goods under a fixed contract. Cosmetic Outsourcing Services International could be such a unit with the added advantage of having strong links to The Body Shop. The advantages of such an agreement are that an International Market does exist and all necessary requirements such as ISO certification are in place.

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### Related Documents

- [www.limpopotourism.co.za/maroela](http://www.limpopotourism.co.za/maroela)
- [www.thebodyshopinternational.com](http://www.thebodyshopinternational.com)
- [www.odifpeg.org.uk/activities/forests\\_and\\_the\\_poor/s0115/final%20report.pdf](http://www.odifpeg.org.uk/activities/forests_and_the_poor/s0115/final%20report.pdf)