



NBI4BIOMASS Project

Preparatory Workshop: Market Access & Finance Report

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Global
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Contents

1. Workshop Summary
2. Workshop Purpose
3. Maximising collaboration during workshop
4. Question 1: Topics for market access & finance workshop
5. Question 2: Organisations & people that need to be at the workshop
6. Question 3 (&4): 30 seconds pitch to attract people to workshop & what is missing?
7. High level insights
8. Closing & next steps
9. Attendance register

Workshop Summary

- 35 participants from 27 organisations attended the workshop, held on 23 July 2023, at the Southern Sun Hotel, Sandton.
- 19 of the participants who were on the three-day Limpopo site visit held on the 20 -22 April, attended the workshop as well.
- The purpose of the workshop was to co-design a strategy for an upcoming workshop (early October) that will create value for NBI corporate members and financiers, in partnership with the AIP biomass ecosystem and its entrepreneurs.
- Group discussions were held to answer three key questions aimed at identifying and selecting the topics for the upcoming workshop, who should be there, and what the elevator pitch should be to secure their attendance.
- A wide selection of topics were proposed, with participants voting for the top 6 they thought were most important to include in the upcoming workshop. These included:
 - Market access: 1) Unpacking market models, 2) Understanding the value proposition to the market and how to fulfil it, 3) Product de-risking certification, standards, and compliance (from an off takers perspective).
 - Finance: 1) Accessing funding (by using mutually beneficial language and breaking silos in banking institutions, 2) Unlocking collaboration between corporates (and funders) for greater impact and project pipelines, 3) Mapping the finance ecosystem (requirements, instruments, governance, opportunities, restrictions).
- Organisations that need to attend were identified, important points for the sales pitch highlighted, and burning issues raised that had not been discussed but were vital to take into consideration.
- The importance of including as many of this group in the market access and finance workshop to be held in early October, was stressed.

Workshop purpose

Co-design an upcoming workshop
that will create value with NBI corporate members & financiers
for the AIP biomass ecosystem & its entrepreneurs

The workshop has as its focus to answer the following three questions:

- What **topics** should the focus of our discussions be to unlock market access & finance?
- Who should be the top 5 appropriate **organisations & people** at the workshop?
- What should be the **30 seconds pitch** to attract the right participants?



Maximising the collaborative learning amongst workshop participants

- A process was followed that enabled a collaborative learning journey between participants while fostering the development of trust and relationships between them. These 3 ingredients are critical for developing a community of practice as the NBI4BIOMASS project wants to do.
- This was be done in a way that maximised the collaborative learning opportunities between participants through a variety of interactive activities, small groups working on specific tasks, and participatory plenary feedback. This ensured the participants actively participated and developed answers to each of the workshop key questions.
- A safe space was created where participants were able to freely express their views, discuss and debate between themselves. Importantly, facilitators in the small group discussions encouraged the quiet voices into the discussions, where it was felt that everybody had the freedom to express themselves and tap into their collective intellectual creativity.
- This enabled participants to develop a variety of different ideas and solutions needed to answer the key questions of the workshop.
- The facilitation approach intentionally allowed for and responded to emergence in the room, and the planned agenda was adjusted to meet these needs.
- This type of collaborative learning was aimed at beginning to lay the foundation for cultivating a community of practice in the future, where participants could continue to learn and practice together in the future.

Key question methodology:

- Key questions were used as a methodology to focus the discussions of the workshop enabling participants to answer the questions and reach tangible outputs by the end.
- These questions were developed according to what the NBI4BIOMASS project needed to achieve by the end of the workshop.



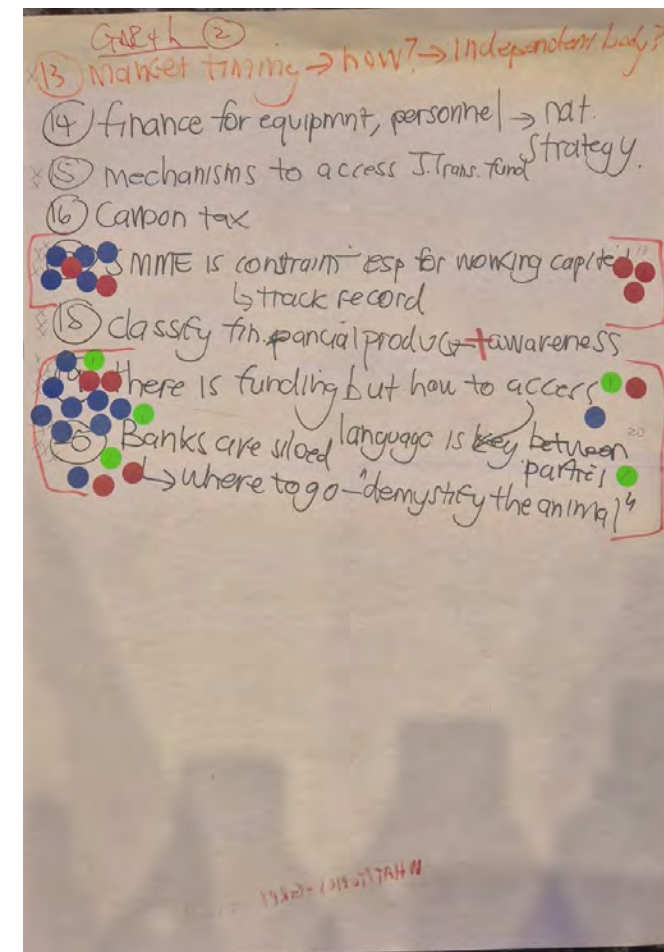
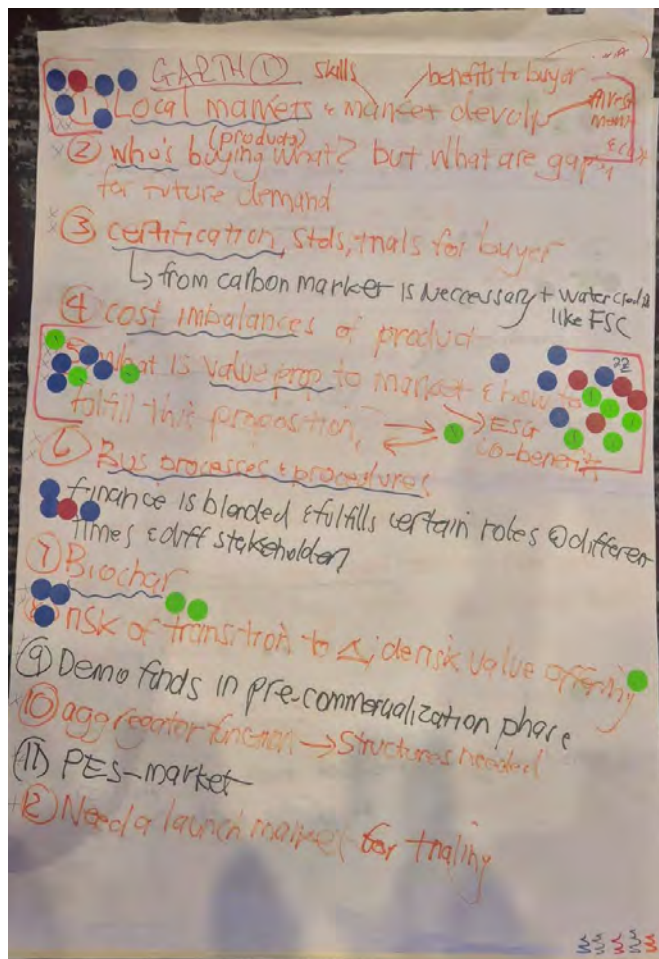
3 WORKING GROUPS ANSWERING:

Q1: What topics should the focus of our discussions be to unlock:

- a) Market access**
- b) Finance**

Workshop Agenda

Session	Focus & Activities
Opening & Project Overview	The workshop commenced with: • Welcome by NBI and GIZ. • Attendee introductions by All. • Overview of the day. • Briefing on the NBI4BIOMASS project by Garth Barnes from NBI thereby establishing the context for needing to co-design the upcoming market access and finance workshop.
<u>Session 1:</u> What do we talk about?	Three group discussions answered this question: Q1: What topics should the focus of our discussions be to unlock: a) Market access b) Finance • Each group then selected their top 3 topics for market access and top 3 for finance, which were shared at a plenary session. • In plenary, all participants then voted, each with 6 stickers, on their top 3 Market access topics and top 3 finance topics.



Group 1 results

- Coloured stickers represent the plenary voting of the most popular topics by all participants
- Each participant had 6 stickers to select their top 6 topics from all the groups

- MARKET** Sarah 1
1. Demand's Prod. Capacity
 2. Value Proposition
 - why should they buy from you?
 - more knowledge @ the product & its benefits
 3. Aggregation < resources
eg. equipment
Product
 4. Specifics of off-take agreements
 - confidently commit to & meet the
 - & not undermine by non-delivery
 5. Greater knowledge/skill in producers
of raw materials
to of own product in order to
supply into appropriate market
 - quality / standards (eg steel supply)
 6. Different markets with diff needs
(we need to surface our own assumptions)
 7. Different products have different qualities/applications
not all suited to micro businesses
key = finding right combination
~ roles for big & small > mix of enterprises
- * VALUE CHAIN



- Sarah 2
9. Who should be in the RBDM
 - scales of technology
 - \$ investment
 10. Knowledge sharing @ appropriate technology
(acknowledging IP etc.)
 11. Ecosystem disconnect around the 'middle man'
 - ↳ linked to aggregation
 - ↳ market wants
 - ↳ producer maybe doesn't
- * UNPACKING MARKET MODELS
1. aggregation
 2. standards
 3. knowledge sharing
 4. value proposition(s) for different contexts
- * knowledge sharing
1. technology
 2. market

Group 2 results

- Coloured stickers represent the plenary voting of the most popular topics by participants
- Each participant had 6 stickers to select their top 6 topics from all the groups

Finance

Sarah 3

1. Unlocking collaboration between Corporates & funders - joint projects for greater impact [pipeline?] (17)
"beyond the rhetoric"
"walk your talk"

while being mindful of host community needs and pressures

2. Co finance - where to find this?

- smaller fund allocations with demand for higher impact
- innovative finance/mechanism - greater return on investment (move away from grants → loans) financially
- donor push for "bigger" programmes - that you have to fit into

3. Is the industry ready to move into "fundable model" space. #tho' conventional finance

4. Restrictions of funding - more for ecosystem mismatch with entrepreneur needs

5. Sustainability & innovation & revolving credit (social impact bond - repayable on success) → find secondary market

6. Linkage to credits - water carbon biodiversity making these more accessible (plug into)

7. Mapping out the finance ecosystem

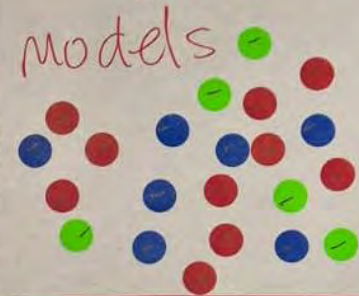
- requirements @ each stage
- opportunities & restrictions
- entry points
- financial instruments & products
- which are fit for purpose @ diff. scales
- Credits - water / carbon / biodiversity / social impact bonds
- governance requirements

Market Access

Summary of market access

1. Unpacking market models
- aggregation
- standards
- knowledge sharing

(22)



2. Value Proposition(s) for different contexts
Why should they buy from you
more knowledge @ products & their benefit

(7)



3. Knowledge sharing
- technology (appropriate) & taking into account IP etc(!)
- market

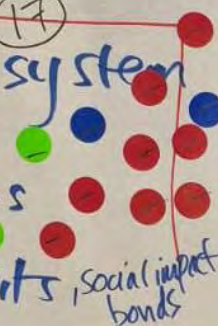
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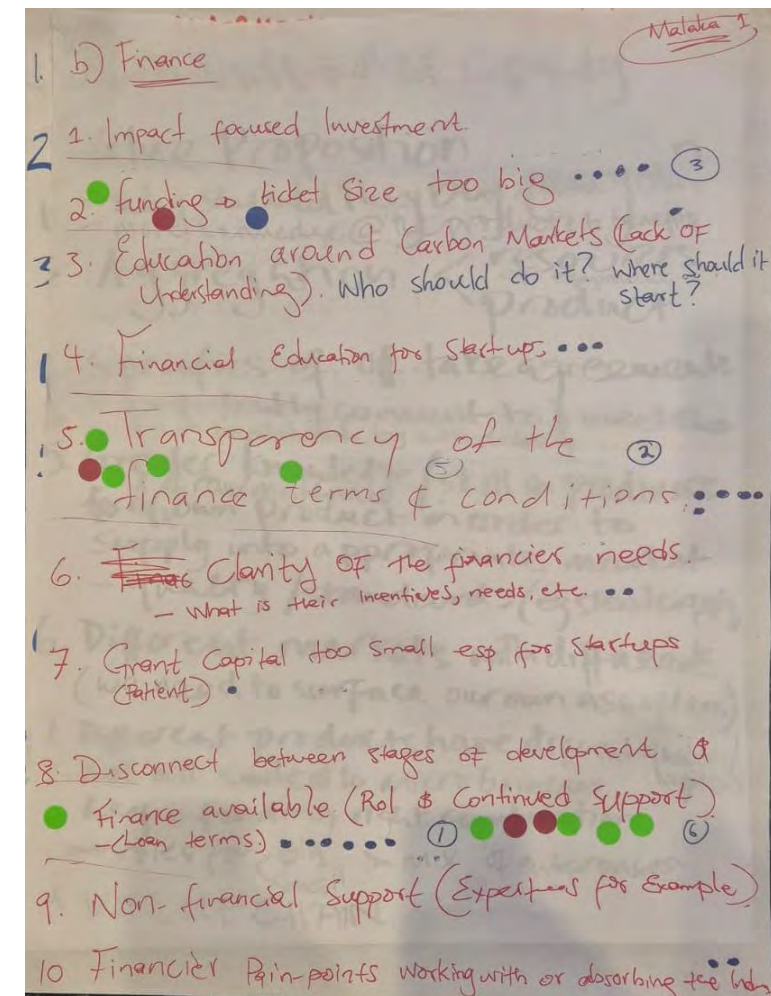
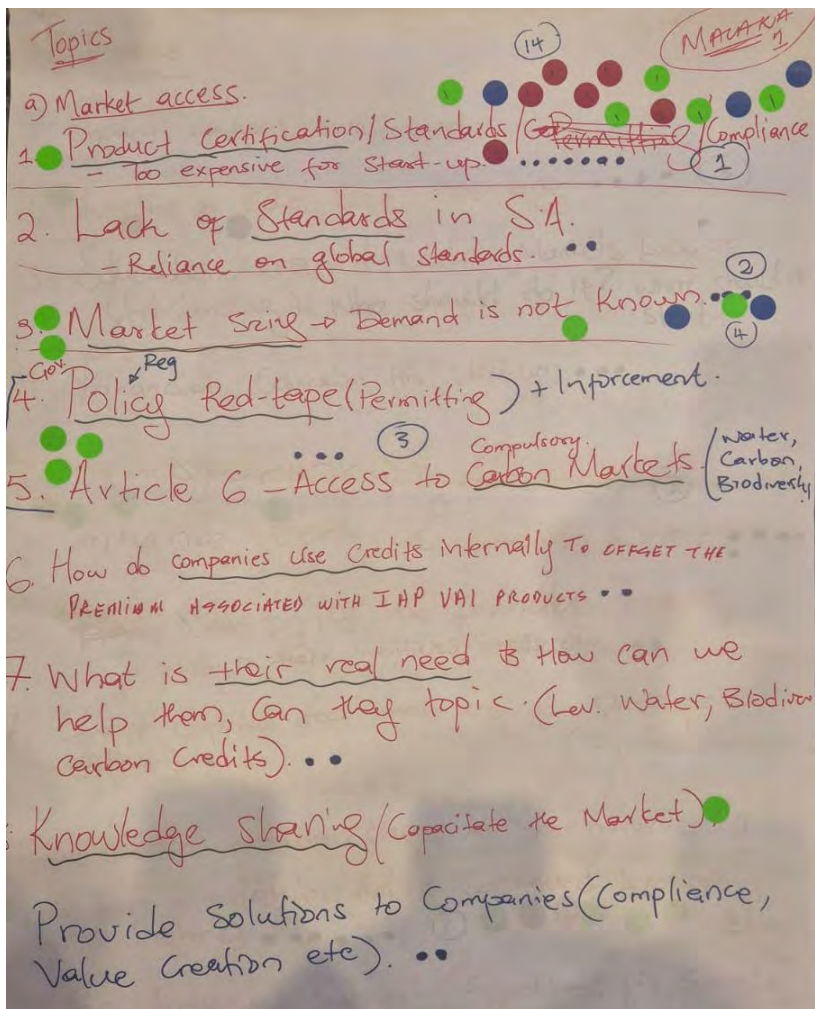


FINANCE

- Mapping the finance ecosystem
- requirements @ each stage
- opportunities & restrictions
- entry points
- financial instruments, credits, social impact bonds
- governance requirements

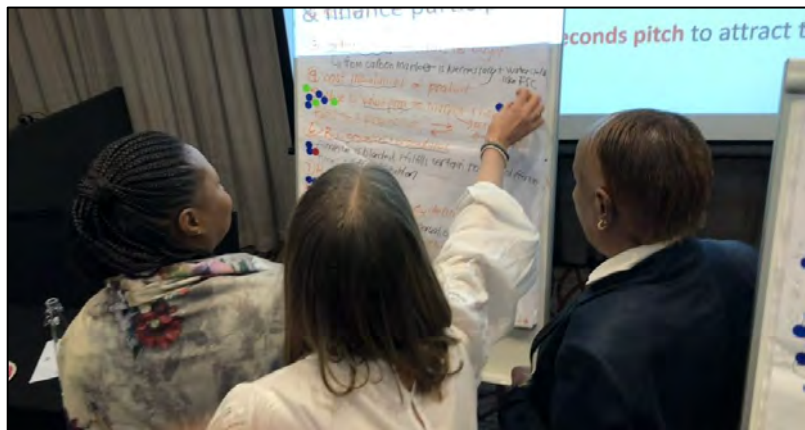
(17)





Group 3 results

- Coloured stickers represent the plenary voting of the most popular topics by participants
- Each participant had 6 stickers to select their top 6 topics from all the groups



The Voting

After each group had presented their results, participants voted for their top 6 topics the upcoming workshop should focus on

The most popular topics were:

(with total vote numbers in brackets)

MARKET ACCESS

- ① UNPACKING MARKET MODELS (22)
- ② WHAT IS THE VALUE PROPOSITION TO THE MARKET AND HOW TO ~~MAN~~ FULFIL THE PROPOSITION (CO-BENEFITS) (22)
- ③ PRODUCT CERTIFICATION, STANDARDS & COMPLIANCE (FROM OFF-TAKER PERSPECTIVE) (14)

FINANCE

- ① ACCESSING FUNDING [BY USING MUTUALLY BENEFICIAL LANGUAGE & BY BREAKING STLOS IN BANKING INSTITUTIONS] (20)
- ② UNLOCKING COLLABORATION BETWEEN CORPORATES & FUNDERS FOR GREATER IMPACT (PROJECT PIPELINES) (17)
- ③ MAPPING THE FINANCE ECOSYSTEM (17)
- requirements | instruments | governance | opportunities
restrictions



3 WORKING GROUPS ANSWERING:

Q2: Who should be the top 5 appropriate organisations and people at the workshop from:

- a) Market access**
- b) Finance**

Workshop Agenda

Session	Focus & Activities
<u>Session 2:</u> Who to invite?	Q2. Who should be the top 5 appropriate organisations and people at the workshop from: a) Market access b) Finance • Three group discussed and answered this question. • Each group then selected their top 5 organisations and people which were then shared in plenary.

Group 1 results

MARKET ACCESS (who)

Malaka

1. Certifications → Those who have walked the walk + Control Unit
 - Werner.
 - BRC
 - FSC
 - SETAs - Skills develop.
 - American Biochar Insti.
+ miles Grey
 - AgriSA.
2. FMCG + mining too
 - + Unilever, SAB etc.
 - SASOL
 - Mining & Energy.
3. Gov. Specific to Credits (Carbon, Water, etc)
4. ~~STND BANK~~ 4. ENC - charcoal buyer & Exporter.
5. ~~IDG~~
4. ZZ2.
5. Technology to uppack value.
 - Willie.

Group 2 results

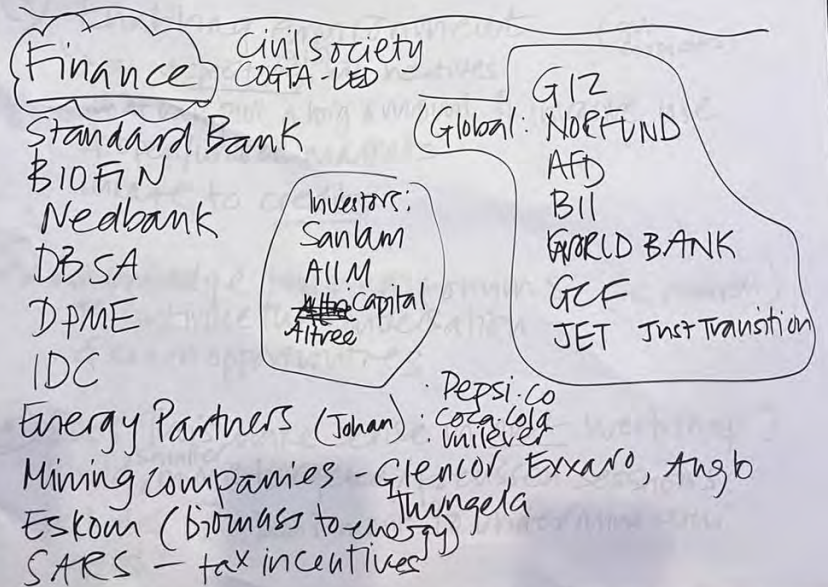
GARTH ^{bank & foundation} (2)
(1) F. 1 - first rand, SFC, BASA, SEDA.
MCSA (M.2)
M2: Sasol (Edna/Ken)
M3: Sasol CSI, SABS, academic; Harry
(Stellenbosch), build capacity of entreps
M2: Verra etc.
M2: networking event to discuss (a learning
opportunity) - Seriti
M3 ~~M3~~ - aggregators
M3 - retail body, ^{Pvt reserves} wild game/bodies,
M3 - ^{wildlife ranching association} AECT
SAPPI, MONDI, FSA
~~DTIC~~, DTIC, DSI, SANPARKS, SANBI
UNDP + Biofin

Group 3 results

In the Room - market ^{Saram ①}

- Govt - standards
 - compliance requirements
 - certification
 - potential market / off taker
 DFFE, DTIC, DoA, DPME(?)
SABS, SANBI, DSBD
- Certification bodies
eg: FSC
- Carbon market players
PURTO EARTH
VERRA - Andre de Ruyter
ISOMETRIC (etc.)
- Research institutions
eg: CSIR, ARC, TIA, WRC, BIOFIN ^{+ finance}
universities - Stellenbosch, UKZN, NMU,
- Industry bodies ^{AgriSA}
FSA ^{marketing association}
access to biomass
market for producer
- Corporates - eg: CO OPS [ag. space]
BKB & Fibre

- Corporates as ^a market for timber & biochar ^{Saram ②}
- SAPPI, MONDI, PG BISON, PPC
- mining houses
- Corporates as market for carbon credits
- Investec - Ninetyone - Allan Gray
- TASC - ACT - JP Morgan etc.
[Global eg: Amazon, Google, Walmart, with local presence]
[Johan's black book] [global banks]





3 WORKING GROUPS ANSWERING:

Q3: What should be the 30 seconds pitch to attract the right market access & finance participants?
Q4: What burning issues are missing?

Workshop Agenda

Session	Focus & Activities
<u>Session 3:</u> What pitch? What's missing?	Q3. What should be the 30 seconds pitch to attract the right market access & finance participants? • One group discussed and answered this question. Q4. What burning issues are missing? • Two groups discussed and answered this new question that was suggested by participants. • Each group then shared their findings in plenary.

What is the pitch?

What is missing?

Malaker

①. Why should they come? SALES Pitch

- Have a plan?

→ Who are you? What's your mandate/Plan?

- E & S in ESG is addressed through this ecosystem.

- ~~With~~ Cost of Inaction (Unifying Concept).

- Business Case: - Env. Benefits, dependencies etc

→ S - Jobs, Rural dev;

→ Alignment to SDGs, BBBEE,

↳ Demonstrated.

→ Value add/opportunities (Water Savings etc

→ Access to a ^{aggregated} network of potential Collaborators.

- Bringing Value chain. to them

→ Opportunity to Co-create. - Invited as role players

→ Diverse role players, coming together to co-create/
unlock an economy....

↳ Across the 3 pillars of Suster..

What is missing?? ^{Small ③}

- ① ^{baseline} piece of research - ^{±15 qns.} survey ^(research house, pro bono)
 - corporate(s)
 - entrepreneur
 - investor
 - gov.

Questions - industry specifics
Similar to what we've explored today

- ② Enabling environment ^(gov. corporates)
 - eg: get ^(1%) specifying, with incentives
 - what can pull a big amount of invasive use
 - & open/unlock markets
 - linkage to credits

- ③ Knowledge sharing forums ^(inc. research)
 - to continue the conversation
 - & share opportunities

- ④ Does this make sense in one workshop?
would ^{smaller} more targeted/focussed sessions be better? Don't want to undermine your "pitch"

- ⑤ Endorsements - ^{Small ④} high level [political?] to create/enhance credibility
eg: industry bodies before going to members
- diff ones, for diff sectors

- ⑥ Telling the bigger picture story & why does it matter
& what's the problem we're ^{trying to} solve?
& what is the impact we want to achieve ^(that is measurable)

- ⑦ Technology innovations

Why would any institutions take us seriously
what are we going to do differently

↳ context has shifted
how do we get organised to take opportunities
↳ pitches to funders for continual engagement
(an investor day) - GIZ @ NYBA offers pitching training
what platforms are we ignorant of that could suit the sector?

↳ database of who doing what for funders - Biodiv Investment Portal.
provide co-benefits → SROI mechanism

Key note speaker to lay ^(common) foundation
⑧ funder needs to understand risk (re-thinking of risk)
↳ language between buyers & sellers

What is missing?

High level insights

- 35 participants from 27 organisations attended the workshop. 14 of the participants were entrepreneurs, 6 were representatives from Business Development Services organisations and 5 were from organisations clearing biomass at scale. This speaks to both the wonderful diversity of actors in the room but also the right representation that aligns with the focus of this project and for the next workshop in early October.
- Despite the diversity of representation there seemed to be a convergence around some of the key issues that emerged during the workshop such as the voting for the most popular topics to take forward.



High level insights

- The value of the diversity represented in the room was considerable – it felt like an emerging sector
- There remains a significant need for greater knowledge sharing and baseline information – on biomass suitability to different products, appropriate technology, potential markets, funding and investment options, certification, standards and compliance



Closing & next steps

Garth Barnes (NBI) and Gavin Watson (GIZ) closed the workshop thanking all for their time, especially for those travelling from outside Gauteng, and consolidated the next steps to develop the market access & finance workshop:

- The NBI team will analyse the ideas harvested, especially those prioritised in the voting, and will determine how to best design the upcoming market access & finance workshop around them.
- The workshop will be held in early October, with a Gauteng-based site visit to be held the day before the market access & finance workshop.