Boosting Organic Trade in Africa

Market analysis and recommended strategic interventions to boost organic trade in and from Africa.

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Boosting Organic Trade in Africa

*Market Analysis and Recommended Interventions to Boost Organic Trade in and from Africa*

*Final Report*
*December 2020*

Commissioned by GIZ and IFOAM – Organics International in the framework of the global project “Knowledge Centre for Organic Agriculture in Africa” (funded by the German Federal Ministry of Economic Cooperation and Development/BMZ)

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The opinions in this report are those of the consultants and not necessarily of GIZ or IFOAM Organics International.

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Executive Summary

This report was commissioned by IFOAM - Organics International to better understand possible interventions that can promote market development and trade of organic produce in Africa.

It fits within the work that GIZ is supporting to promote organic agriculture in Africa, providing technical advice and building capacity through a network of regional knowledge hubs for organic agriculture. The network of regional knowledge hubs for organic agriculture in Africa (KCOAs), financed by the German Ministry of Economic Cooperation and Development (BMZ), consists of four regional knowledge hubs in East, South, West and, more recent, also North Africa and for the future also planned for Central Africa. These knowledge hubs are part of the Global Project Knowledge Centre for Organic Agriculture in Africa (KCOA), which GIZ is coordinating.

IFOAM - Organics International took up the responsibility to coordinate and implement a market analysis to identify strategic options at a continental level in Africa. The identified options can benefit from support by GIZ (financial & content expertise and experience) and Nuremberg Messe (trade platform experience). It should be noted that statements and recommendations in this report are the suggestions and opinions from the writers and not necessarily from GIZ and IFOAM.

To better understand possible interventions that can accelerate organic trade in Africa (in line with the overall guidance of Organic 3.0), this report analyses strategic options for decision makers in institutions like AfrONet, the Continental Steering Committee of EOAI, or supporting donors like German BMZ.

The study provides background information to facilitate the development of (or access to) markets for organic produce on local, regional, national, and international level and discusses the potentials for setting-up local/regional organic trade fairs. It has two parts and aims at:

1) Developing a comprehensive understanding of markets and consumption patterns for organic products within Africa, and from Africa to other markets; and

2) Having available recommended intervention options for actors and decision makers to strengthen the organic market and trade based on the analysis and interpretation of the information received in the first step.

The first objective is reflected in Chapter 2, 3 and 4, while Chapter 5, 6 and 7 reflect on the second objective.

Because of the scope of the study, covering the African continent with 54 countries, a Rapid Market Appraisal methodology has been used, comprised of a range of simple methods for collecting quantitative and qualitative information. Through desk research, information from available publications was collected, while in absence of official statistics triangulation took place by having interviews and workshops with insiders, market participants and experts. The theoretical framework for reporting orients itself towards the so-called Market Systems Development (MSD) approach that has been developed by the Springfield Centre and other development cooperation organisations and has come out of the earlier M4P (Marketing for the Poor) framework.

Chapter 2 takes a geographical approach focusing on Africa as a whole, the 5 main regions of the continent (Southern, East, Central, West and North Africa) and a prioritised selection of African countries/markets.

Each region and country is unique and the conclusions need to be drawn one by one. Nevertheless, common lessons and important considerations are for example:
In all countries, the export figures for organic by far exceed the domestic consumption. There is indication for growing demand for ‘natural’, ‘healthy’, ‘food safe’ and certified products, but this is not registered and cannot be quantified.

The main exported organic products are coffee, cocoa, olive oil, cashew nuts, shea nuts and gums. Other important products for which the value could not be estimated include tropical fruits, fresh vegetables, citrus fruits and Medicinal and Aromatic Plants (MAPs).

All countries, except for South Africa and some North African countries, predominantly export primary produce and show limited processing and value addition in the country.

Although there is overall limited awareness on the values and benefits of organic agriculture at consumer level, in all countries there are efforts for domestic market developments which is mostly driven by food safety concerns and by a growing middle-income class. There is a big unserved potential demand in domestic and regional markets, in particular for products which matter to local populations.

On the supply side for the domestic market PGS could offer interesting solutions, however, it needs to be regulated and harmonised. Verifying/certifying at relatively lower cost with PGS can make production systems more inclusive, more diversified and add value (processing) to local markets.

Countries that collaborate well between the various organic sector movements and between government, civil society and the private sector tend to be more successful. Examples are Tunisia, Togo and Uganda.

External investments by donors showed impact in some cases. Overall, organic markets of regions with donor investments seemed to develop better than regions without donor support.

The fact that formal trade figures on organic agriculture in Africa are extremely limited, illustrates the still relatively immature status of the sector, despite a long tradition of the organic movement across the continent.

Chapter 3 takes a value chain approach focusing on a selected product (or product group) based on exemplification: coffee, tropical fruits and shea.

The drivers for growth of organic production and trade for these selected three value chains are international market demand combined with support through investments in supplying producers and exporters. The latter is the case for all three sectors. Demand for tropical fruits is also driven by local markets. Besides, processing of these fruits offers value addition and access to additional markets.

Both shea and coffee producers face certification challenges. The effect of the new EU regulation on Group Certification on African exports which is discussed in Chapter 4 will pose even more challenges on the producers and exporters and it will come at an even higher cost. On the other hand, the formation of the African Continental Free Trade Area (AfCFTA) in 2019, which is also discussed in Chapter 4, could offer opportunities and help effectuating sustainability changes in the production and marketing of agricultural produce.

The second part of this study, reflected in Chapter 5, 6 and 7, focuses on the question on how to boost organic trade within and from Africa. The unlocked potentials found in the first part of the study are translated into an approach of product-market development for existing and new markets: deeper market penetration, product development, market development and diversification. For this, benchmarking and formalising of organic production for local and international markets are needed, just like product innovations and increasing the opportunities of value addition. A smart mix of regional/national and private-sector inclusive initiatives is needed. Part of this shift must be geared
to promoting local and regional market development. Growing concerns of food safety and health, and a growing middle class are expected to offer the better growth potential for regional and local markets.

Chapter 6 elaborates four strategic pathways or intervention options:

1) Market development and Trade facilitation
2) Capacity building of actors
3) Information systems building, and
4) Creating an enabling environment.

They are much interrelated and ideally work in conjunction to boost organic production and trade.

Chapter 7 provides concluding recommendations and a time-framed action plan to implement the intervention options. Also here, focus is on building synergies through strategic partnerships, in order to achieve organic sector development and trade that takes into account the various perspectives.

The report offers substantial information for determining national and regional priorities of action, and potential organic value chains that can be considered for further trade promotion.
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<th>Abbreviation</th>
<th>Full description</th>
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<tr>
<td>ACALISE</td>
<td>African Centre for Agroecology and Livelihood Systems</td>
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<td>ACP</td>
<td>African Caribbean Pacific</td>
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<td>AE</td>
<td>Agroecological</td>
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<td>AFA</td>
<td>Kenya’s Agriculture &amp; Food Authority</td>
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<td>AFCA</td>
<td>African Fine Coffee Association</td>
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<tr>
<td>AFCTA</td>
<td>African Continental Free Trade Area</td>
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<td>AFD</td>
<td>Agence Française de Développement</td>
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<td>AFONet</td>
<td>African Organic Network</td>
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<tr>
<td>AFSA</td>
<td>Africa Food Sovereignty Alliance</td>
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<td>AJOAEO</td>
<td>African Journal of Organic Agriculture and Ecology</td>
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<tr>
<td>AMABIO</td>
<td>Association Marocaine du Bio</td>
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<tr>
<td>ANA-Bio</td>
<td>Association Nationale pour l’Agriculture Biologique au Togo</td>
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<tr>
<td>AOC</td>
<td>African Organic Conference</td>
</tr>
<tr>
<td>APEX-Burkina</td>
<td>Agence pour la promotion des exportations du Burkina Faso</td>
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<tr>
<td>ARC</td>
<td>Agriculture Research Center</td>
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<tr>
<td>ATAD</td>
<td>Tunisian Society for Sustainable Agriculture</td>
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<tr>
<td>AU</td>
<td>African Union</td>
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<tr>
<td>AUC</td>
<td>African Union Commission</td>
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<tr>
<td>BCS</td>
<td>German Certification Organisation</td>
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<tr>
<td>BDOCA</td>
<td>Bio-dynamic and Organic Certification Authority</td>
</tr>
<tr>
<td>BMZ</td>
<td>German Federal Ministry for Economic Cooperation and Development</td>
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<tr>
<td>BOAM</td>
<td>Burundi Organic Agricultural Movement</td>
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<tr>
<td>BVAT</td>
<td>Biovision Africa Trust</td>
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<tr>
<td>CAADP</td>
<td>Comprehensive Africa Agriculture Development Programme</td>
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<tr>
<td>CB</td>
<td>Certification Body</td>
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<tr>
<td>CBI</td>
<td>Centre for the Promotion of Imports from developing countries (Netherlands)</td>
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<tr>
<td>CERES</td>
<td>Certification of Environmental Standards (control body)</td>
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<tr>
<td>CFTA</td>
<td>African Continental Free Trade Area</td>
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<tr>
<td>CIAT</td>
<td>International Center for Tropical Agriculture</td>
</tr>
<tr>
<td>CIF</td>
<td>Cost, Insurance and Freight</td>
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<tr>
<td>CIRAD</td>
<td>French Agricultural Research Centre for International Development</td>
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<tr>
<td>CLOA</td>
<td>Central Laboratory for Organic Agriculture (Egypt)</td>
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<tr>
<td>CNABio</td>
<td>Conseil National de l’Agriculture Bio (Burkina Faso)</td>
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<tr>
<td>COAE</td>
<td>Center of Organic Agriculture in Egypt</td>
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<tr>
<td>COLEACP</td>
<td>Europe-Africa-Caribbean-Pacific Liaison Committee</td>
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<tr>
<td>CSA</td>
<td>Climate Smart Agriculture</td>
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<tr>
<td>CTAB</td>
<td>Technical Center of Organic Agriculture (Tunisia)</td>
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<tr>
<td>CTO</td>
<td>Coordination Togolaise des Organisations Paysannes</td>
</tr>
<tr>
<td>DDT</td>
<td>Dichlorodiphenyltrichloroethane</td>
</tr>
<tr>
<td>DED</td>
<td>German Development Services</td>
</tr>
<tr>
<td>DGA</td>
<td>General Directorate of Organic Agriculture (Tunisia)</td>
</tr>
<tr>
<td>DIAF project</td>
<td>Agricultural and Forestry Technical Dialogue project</td>
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<tr>
<td>DRC</td>
<td>Democratic Republic of the Congo</td>
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<tr>
<td>DTIC</td>
<td>Department of Trade, Industry and Competition</td>
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<tr>
<td>EAGA</td>
<td>Egyptian Agribusiness Association</td>
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<tr>
<td>EOM</td>
<td>East African Organic Mark</td>
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<td>EAOPS</td>
<td>East African Organic Products Standard</td>
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<tr>
<td>ECOAS</td>
<td>Egyptian Centre of Organic Agriculture Society</td>
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<tr>
<td>ECOWAS</td>
<td>Economic Community of West African States</td>
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<tr>
<td>EOA</td>
<td>Ecological Organic Agriculture</td>
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<tr>
<td>EOA-CSC</td>
<td>Ecological Organic Agriculture Continental Steering Committee</td>
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<tr>
<td>EOA-I</td>
<td>Ecological Organic Agriculture Initiative</td>
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<tr>
<td>EPOPA</td>
<td>Export Promotion of Organic Products from Africa</td>
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<tr>
<td>ETAU</td>
<td>Eco Terra Alliance Uganda</td>
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<tr>
<td>EU</td>
<td>European Union</td>
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<tr>
<td>EUR</td>
<td>euro (€)</td>
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<tr>
<td>FAO</td>
<td>The Food and Agriculture Organisation</td>
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<tr>
<td>FARAN</td>
<td>Forum for Agricultural Research in Africa</td>
</tr>
<tr>
<td>FENAB</td>
<td>Fédération Nationale pour l’Agriculture Biologique Senegal</td>
</tr>
<tr>
<td>FIB</td>
<td>Research Institute of Organic Agriculture</td>
</tr>
<tr>
<td>FIMABIO</td>
<td>Fédération Interprofessionnelle Marocaine de la Filière Biologique</td>
</tr>
<tr>
<td>FNAB</td>
<td>Fédération Nationale d’Agriculture Biologique (France)</td>
</tr>
<tr>
<td>FSSC</td>
<td>Food Safety System Certification</td>
</tr>
<tr>
<td>GACP</td>
<td>Good Agricultural and Collection Practices</td>
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<tr>
<td>GATS</td>
<td>Global Agricultural Trade System</td>
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<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
</tr>
<tr>
<td>Giz</td>
<td>German Agency for International Cooperation</td>
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<tr>
<td>GMO</td>
<td>Genetically Modified Organism</td>
</tr>
<tr>
<td>GSA</td>
<td>Global Shea Alliance</td>
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<tr>
<td>ICRAF</td>
<td>World Agroforestry</td>
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<tr>
<td>ICS</td>
<td>Internal Control System</td>
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<tr>
<td>IFAD</td>
<td>International Fund for Agricultural Development</td>
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Acknowledgments
The authors of this report are very grateful to all supporters of this study. The rich outcomes would not have been possible without the help of many. All contributed with an immense positive spirit and with the highest interest to be part of boosting organic trade in Africa. We see ourselves unable to enumerate everybody that deserves to be listed here. However, we would like to mention the following groups (in no particular order), to which we express our sincere thanks and appreciation:

- All our informants, particularly to the African civil society, private sector and government representatives, who shared their views in the various rounds of the one-to-one interviews, in the online surveys and in the workshops.
- All the experts from inside and outside Africa who joined in our workshops and/or shared their insights, provided strategic or detail feedback on draft versions of this report, so that we could improve and be sure to be accurate.
- To FiBL, COLEACP and Ecocert who provided specific information of their databases even beyond their publications/
- To authors and institutions who researched relevant aspects of African organic domestic and international trade and who published their knowledge on websites, in studies or publicly available databases. They helped us make references and not to repeat work done earlier.
- To the people from our advisory committee, particularly those related to AfrONet, EOA-I, UNCTAD, Agroeco and the African Union.
- To the mandators of this study, not least also for their active and competent contributions and inspirations: IFOAM - Organics International; BIOFACH Nuremberg Messe and the financial enabler, GIZ/BMZ.
- To all those that contributed in the background with their services including but not limited to research, IT, data management, layout or hospitality services.
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Introduction chapter

1. Background and Methodology

Africa can be seen as a place with uncountable challenges for its population and its environment, but it can also be seen as a continent with a big diversity and countless untapped potentials. This is the case also for agriculture and nutrition.

From 2013 - 2017, the global organic movement discussed and ratified a strategic framework for its further development, called Organic 3.0\(^1\). While Organic 3.0 answers the overall direction, more specific answers are needed for Africa.

1.1. Unveiling opportunities to untap potentials for Africa

To understand better which possible interventions could accelerate organic trade in Africa in line with the overall guidance of Organic 3.0, this report develops strategic options at the continental level for the discussion of decision makers in the institutions e.g. in AfrOnet, the Continental Steering Committee of EOA-I or the supporting donors like the German BMZ.

The study provides background information to facilitate the development of (or access to) markets for organic produce on local, regional, national, and international level and discusses the potentials for setting-up local/regional organic trade fairs. It has two parts and aims at:

1) developing a comprehensive understanding of markets and consumption patterns for organic products within Africa and from Africa to other markets; and

2) having available recommended intervention options for actors and decision makers to strengthen the organic market based on the analysis and interpretation of the information received in the first step.

Chapters 2-5 and chapter 6 reflect these two objectives.

Specifically, in the first part, the comprehensive analyses aim to find answers to questions, including the following:

- What kind of organic products are on demand in African countries and can be provided from the continent itself? What are the drivers to supply the identified demand?
- What kind of African products (in what quantity) are currently traded and in demand in the international market, and have the potential to be traded? What is the potential scale of the trade?
- What are the reasons for a slow uptake of trade within Africa? What are the main hindrances at political and economic level across Africa?\(^2\)
- What are the challenges for exporting African organic products?
- How will the new EU regulation on Group Certification affect the export of African organic products?
- And how will the African Continental Free Trade Area (AfCFTA) influence the organic trade?

The overview of options to stimulate African organic markets in the second part includes these questions:

- Which format is most suitable to the current organic trade situation in Africa?
- And what will be the development aspect in supporting such specific formats?

\(^1\) https://www.ifoam.bio/why-organic/organic-landmarks/organic-3-0-truly-sustainable

How will these formats be financed: which instruments are existent and what are their implications?

1.2. Rapid market appraisals and market system development approaches

The study has a vast scope of 54 countries. This, combined with limited earlier research, available data, literature evaluations and research resources requires a methodology aiming at optimal filtering of information. Such a methods assures keeping a summative overall strategic perspective, geographic and value chain prioritisations rather than complete data and in-depth detailed understandings of particular local realities.

The study uses the widely recognised methodological approach of the Rapid Market Appraisals (RMA)³. RMAs provide a quick, flexible and effective way of collecting, processing and analysing information and data about markets and marketing systems. Based on the results of RMA analysts, one can develop appropriate programs and policies for promoting production and marketing interventions. The purpose of RMAs is the understanding of market potentials without collection of all details. RMAs comprise a range of simple methods for collecting quantitative and qualitative information. RMAs require flexibility and investigative approaches and rely in absence of official statistics on insiders, the market participants, which are seen as the experts. The main tools are semi structured interviews paired with discussions of literature studies and information published by institutions and media. Usually, RMAs are implemented at the sites of production, processing and marketing. However, due to the wide geographic scope and the travel restrictions related to the COVID-19 pandemic, this study reached most informants through remote Internet conversations.

Our references are listed in the appendix. Of particular help were the global organic statistics of FiBL⁴, who kindly made available also raw data⁵ behind the statistics book. These data were compiled by ProFound for the regional and country market analyses under Chapter 2 and 3. When these data at continent or country level deviated from the statistical yearbook The World of Organic Agriculture (FiBL and IFOAM), the data of the latter source has been taken as the reference.

Other databases included an IFOAM database on certification bodies, the IFOAM PGS maps⁶ and the member directory⁷ listing relevant organic umbrella bodies and other organic organisations. Broad sector studies with country reports implemented by the AU’s EOA-¹⁸, by the German GIZ/KfW (unpublished)⁹ and on regional/national level of other projects (e.g. the OM4D project¹⁰ in West Africa or the organic knowledge hub studies in North Africa¹¹) helped to gain overview and find the relevant market and sector actors to interview. Due to absence of export databases for organic products from Africa, organic import databases for products from Africa of the EU (TRACES) and the USA (GATS

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⁴ Willer et al., 2020. The world of organic agriculture
⁵ From 2018, primarily collected through surveys amongst Certification Bodies
⁶ https://pgs.ifoam.bio/pgs_groups/map?region=africa
⁷ https://directory.ifoam.bio/affiliates?region_filter=Africa
⁸ Auerbach, R., Myles Oelofse, Sasha Metz-LaGrange, Anne Ross and Aharon de Grass (2019). Draft Assessment of North, Central, West & Southern African Food Systems, with a view to mainstreaming Ecological Organic Agriculture
¹¹ https://deutschland.sekem.com/portfolio/bio-wissenszentrum/
system\textsuperscript{12} were of particular interest. While the USDA GATS database is publicly accessible, the EU plans access to TRACES\textsuperscript{13} only in the future and we had to rely on a limited publication of data (the Key developments as published in the EU Agricultural Market Briefs)\textsuperscript{14}.

One of the critical limiting factors for getting a proper idea about production and trade is the fact that, despite many efforts, most of the production and trade is not registered, in particular also when based on Participatory Guarantee Systems (PGS) and going to informal markets. This is a general problem we encountered, including the reliability of available data. Therefore, in addition to the above-mentioned resources, information gathering has been complemented with interviews for key informants and an on-line survey to fill quantitative gaps as much as possible, and to obtain more qualitative information from the different regions, countries and relevant stakeholders.

The theoretical framework for reporting orients itself to the so-called Market Systems Development (MSD)\textsuperscript{15} approach that has been developed by Springfield centre and other development cooperation organisations and has come out of the earlier M4P (Marketing for the Poor) framework. MSD is a development approach that advocates system thinking and criticises subsidy provision to certain actors without looking at the whole market, which needs to function in a way that facilitates sustainable development (means here beyond projects) without donor support. The MSD approach only works if markets are analysed before, during and after the projects with a system view. This study uses a particular step in the MSD theory: the mapping of the markets. It uses the so-called donut (a way of visualisation) to structure information in a comprehensive way. The donut is particularly suitable for providing a clear framework to create understanding in a Rapid Market Appraisal context. We used the donut methodology and visualisation to put centre stage organic markets in a certain country or of a certain value chain.

While the donut is an excellent tool to make analyses, to understand qualitative market information and to visualise the connections between the various market functions, it provides little space to highlight quantitative information e.g. for comparing locations or value chains. We therefore use Info Graphs with standard key indicators to visualise the size of production and trade in a certain context.

1.3. Continental scope with prioritisation and exemplification

The study has the above-mentioned continental scope. In order to consider the immense diversity of traded products included domestically and internationally, the agroecological realities and the socio-economic conditions, the study not only takes a continental view, but it prioritises and exemplifies.

The analyses take two approaches:

- Geographical approach focusing on a defined area, which means that we selected the most important countries (prioritisation);
• Value chain approach focusing on a product or a group of products. The value chains are not selected according to importance but according to suitability to represent a diversity of trading systems (exemplification).

All African regions are represented. While Africa is commonly divided in five regions (North, East, Central, West and South) alongside national borders, there are various official allocations of countries to the five regions. This study uses a definition of the SWAC/OECD, which corresponds well with the organic actors unofficially collaborating on regional level. 16

Based on country studies (EOA-I)17 and organic areas (FiBL statistics18), 20 African countries have the potential to be among the top eight countries of the continent in terms of organic trade. We selected the eight focus countries based on a closer look into four criteria:

A. Production: Organic production and producers
   This criterion is based on production indicators. It includes organic agricultural land, wild collection, number of producers, amount of production and number of processors. A ranking of the countries leads to allocated ratings from one to five.

B. Trade: Estimated trade volume
   This criterion is based on the indicators: USA import value, EU import volume19 and number of exporters. Ideally, domestic trade is also part of it, however the data is difficult to obtain. Again, ranking of the countries leads to allocated ratings from one to five.

C. Organic institutions: Organic Institutional development
   Ratings allocated in this criterion are based on the EOA-I country assessment. For the countries without EOA-I assessment (mostly in East Africa), the authors made their own assessment based on qualitative information including the GiZ/KfW study20.

D. Country governance: Trade environment
   This criterion looks at the governance of the country and the friendliness of the economic environment. We drew ratings from the assessment of the Bavarian chamber of commerce (for attractiveness of economic activities (e.g. investments, rule of law, dynamic economy, corruption control, effectiveness of government services, etc.).21

We identified the three studied value chains based on their value of exemplifying trade and learning value for the evaluation of the strategic options. The selected value chains had to be a) important and show development potentials, b) be particularly different from one another and c) applied in more than one country and have a broader geographical coverage.

1.4. Forward strategies

As explained above, the study has two parts implemented in two phases:

A) Rapid Market Appraisals (RMA) for analyses of the past and present situation and the conclusion thereof. The results of this phase are reflected in chapters 2 - 4.

B) Identifying potential intervention strategies for the future to boost organic trade in Africa based on the analyses of part A). The results are reflected in chapters 5-7.

16 http://www.west-africa-brief.org/content/en/six-regions-african-union
18 Willer et al., 2020. The world of organic agriculture
19 For EU, only imported volume data is available.
The methodology in part A is based on 29 individual interviews. An online survey, which was filled out by 20 persons from around the continent supported the information gathering.

Based on the analyses in part A), chapter 5 discusses and concludes on the opportunities and identifies key issues in the dialog with key African organic experts. Those include but are not limited to regulatory framework, transparency of information, acceleration of private sector initiative, capacity on individual, institutional and market levels, trade facilitation and investment capital.

The study further assumed (and got that confirmed in the workshops and in the dialog with stakeholders) that there is consensus on the desirability of an overall goal of increased organic trading activities using the potentials of local, national, regional and intercontinental markets. For the questions of how to conclude on the gained information and how to boost the market, two participatory workshops of 1 - 2 days were organised with most participants joining online on Zoom or MS Teams to assure a wide opportunity for stakeholders to take part despite geographical distances and travel restrictions in COVID 19 times.

The inclusive approach yields a wide range of ideas for the most promising strategic approaches to achieve the consensual goal. Those ideas result in four main options on how to best invest into the organic sector that are outlined in chapter 6. The options are:

1) Trade facilitation including a continental organic trade fair concept;
2) Market system development with an MSD/capacity building approach;
3) Information system building option; and
4) Focus on an enabling environment with good sector governance.

All options were discussed in an in-depth workshop with sector stakeholders, with key experts as well as with the mandators and implementors of the study.
2. Understanding Production and Markets for African Organic Produce with a geographic perspective

This chapter shows the Organic African market from different perspectives. First of all, an overview for the whole continent is presented: compared globally (2.1), a summary of the main organic regions and countries on which the country selection for later sections is also based (2.2) and an overview of production, trade flows (2.3). After that, from Section 2.4 – 2.8, we will understand better the diversity within the African continent when a snapshot of the 5 African regions will be presented. Sections 2.9 – 2.16 discuss the selected countries in greater depth. Each section provides conclusions and preliminary food for thought, while Section 2.17 will provide overall conclusions on prioritisation and segmentation for future action.

2.1. Africa compared globally

A comparison to other continents puts information on the organic markets in Africa in perspective. This comparison below will show that Africa plays a small, but growing role in the global organic market. While some other regions in the world have embraced organic agriculture, Africa as a whole is still focused on conventional agriculture and doubtful about whether or not organic agriculture can be part of the solution for problems related to food security, food safety, climate change, soil degradation, low productivity and lack of access to inputs, amongst others.

Starting with a comparison of organic production between Africa and the rest of the world, it is possible to compare organic land area and numbers of organic producers between world regions. According to data from Certification Bodies for 2018, Africa accounted for just 3% of global organic agricultural land.

![Shares of world regions in global organic agricultural land, 2018](image)

In the period 2008-2018, Africa’s organic agricultural land increased by 100% indicating the growth of the organic sector in Africa. However, other world regions also experienced growth and the share of Africa in global agricultural land has remained more or less the same. In the more recent past, certified agricultural land in several countries has declined (e.g. in Zambia, South Africa).

Africa plays a much bigger role in global wild-collection. In terms of area for wild-collection, Africa accounted for 33% of the global area. However, the area is not fully representative of the relative importance of Africa’s wild-collection on a global scale. Almost 50% of the wild-collection area is for

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22 Willer et al., 2020. The world of organic agriculture
beekeeping, while Africa’s total honey exports to the world (organic and conventional) amounted to only 4,459 tonnes / USD 13 million in 2019.24

**Shares of world regions in global organic areas for wild-collection, 2018**

Compared to Oceania, North America, Europe and Latin America, much of the organic production in Africa is small-scale. While Africa only accounts for 3% of the global organic agricultural land, Africa accounts for 28% of total organic producers (farmers and collectors) in the world, indicating a relatively small average farm size. Typical African organic production in cocoa and coffee markets for example is small-scale production by smallholder farmers organised in producer groups and cooperatives which establish and maintain an Internal Control System (ICS) for their members. Note however that data on the numbers of organic producers are often incomplete as many countries report about groups of farmers and collectors instead of individual producers and collectors.

As Africa mainly produces certified organic products for export markets, its role in international trade is somewhat bigger than would be expected based on its share of organic production. Particularly Europe sources a considerable part of its organic import needs in Africa. In 2019, Africa accounted for 10% of total EU organic import volumes. Africa is an important supplier of various products that the EU cannot produce, such as tropical fruits and shea, and for which proximity to Europe is an advantage, such as fresh fruits and off-season vegetables.

The large African share in European organic trade is not reflected by participation in Europe’s leading organic trade fair BIOFACH. In the 2020 edition of BIOFACH, the total number of African exhibitors was just 140. This represented 3.7% of all exhibitors at BIOFACH.

The limited role that Africa currently plays in the global organic market may be explained by the institutional framework. Compared to many other regions in the world, institutional development of the organic sector in Africa lags behind. Only three countries (Morocco, Tunisia and recently Uganda) have an organic policy, organic production standards, strong government support for the organic sector and a well-developed National Organic Agriculture Movement (NOAM). Tunisia, Morocco and since January 2020 also Egypt, are the only countries in Africa with an organic regulation in place. Tunisia is the only African country with control measures that have been recognised as equivalent to the EU.

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24 International Trade Centre, Trade Map, 2020
2.2. Overview on continental level

Infographic African organic production

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified agriculture land:</td>
<td>2,003,976 ha</td>
</tr>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>11,529,725 ha</td>
</tr>
<tr>
<td>Organic agriculture land in % of total agriculture land:</td>
<td>0.2%</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>788,858</td>
</tr>
</tbody>
</table>

The data show that the total amount of certified organic agricultural land in Africa has remained small. One of the main reasons for the lack of uptake of organic farming is the difficulty for many farmers in Africa to get access to resources for organic agriculture, such as inputs and training. For example, government Farmer Input Support Programmes often focus on providing agro-chemical inputs for conventional farming and give little or no attention to organic production. Another reason is the low relevance and big difficulty to get certification services. Since most countries are not regulated, farmers do not need certification to claim their products organic and consumers do not ask for it, either. Therefore, in many parts of Africa, PGS has evolved as alternative guarantee system.

When farmers need training on organic farming, they can often not get access to suitable extension services and have difficulty finding commercial Business Service Providers for such training. Throughout Africa, NGOs recognised the need for support and are playing a crucial role in facilitating access to resources for farmers. They organise training on organic farming and often provide support with certification.

With large amounts of land in Africa farmed by smallholders that are still applying traditional farming techniques based on low external inputs, organic agriculture provides an excellent opportunity to enhance productivity, resilience, and profitability of smallholder farming. Organic farming can be made accessible by building on traditional farming techniques and the use of affordable, locally available resources.

These are some general observations about organic production in Africa that provide part of the explanation for the relatively small role of Africa in global organic production. For a more complete picture of Africa’s challenges, the following country and region analyses provide specific production challenges for each country and region. The analyses will show that particularly the private sector can play a leading role in the development of the organic production in Africa.
Infographic African organic market

Main products for interregional export markets:
Tropical fruits, (cashew) nuts, coffee, olive oil, shea, cocoa, medical and aromatic plants

Main products for domestic and regional markets:
Vegetables and fruits

Total volume of the exports
EU imports: 332,064 tonnes in 2019
USA imports: 17,719 tonnes / USD 73 million in 2019

Total value of the exports:
n/a

Number of operators that are exporting from Africa:
2,892

Trade in organic products

Exports are driving development of the African organic market and the European Union is Africa’s largest trade partner for organic products. There are various reasons for the importance of the EU as a trade partner for Africa. Firstly, the EU is the largest market for organic products in the world. Secondly, Europe and Africa have strong historic relations. Thirdly, the proximity of Europe has advantages in terms of costs and delivery times. The USA is another major trading partner for Africa. However, Africa has less competitive advantages in the USA market compared to the European market. For example, short delivery times are important in the fresh fruit and vegetables trade. Therefore, the USA sources much organic fruit and vegetables from nearby Latin America instead of Africa. The Middle East, India and East Asia including Japan are reportedly increasingly important organic markets for produce from Africa. However, there are no statistics available to verify these observations.

Shares of African countries in EU import volumes, 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>Import Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>30%</td>
</tr>
<tr>
<td>Togo</td>
<td>17%</td>
</tr>
<tr>
<td>Tunisia</td>
<td>13%</td>
</tr>
<tr>
<td>South Africa</td>
<td>13%</td>
</tr>
<tr>
<td>Cote d’Ivoire</td>
<td>6%</td>
</tr>
<tr>
<td>Morocco</td>
<td>6%</td>
</tr>
<tr>
<td>Ghana</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>
The BIOFACH trade fair in Nuremberg, Germany, is the main platform for African organic exporters to meet with European buyers. While only a few North African countries have organised national pavilions at BIOFACH consistently over the years, most African producers found it challenging to organise their exhibition at this trade fair. In recent years, an Organic Africa Pavilion facilitates exhibition by individual African exporters.

Even though food safety issues have raised interest in organic products across Africa, local markets for organic products are still underdeveloped in most African countries. High price premiums for organic products and lack of a suitable distribution network often limit accessibility to a small group of affluent consumers. However, high price premiums do not apply in all cases. As most organic certified producers primarily target export markets, their excess organic production is sometimes not of interest to the local market. In those cases, organic products are sold locally as conventional products without a price premium.

Whereas international organic markets require certified products, the local market for organic products in Africa consists largely of products with ‘self-claims’ such as ‘organic by default’ and ‘natural’. These products often come from farmers applying traditional low-input farming techniques or from collectors sourcing from wild ‘natural’ areas. PGS currently account for a small part of the market, but their number is growing. Most of the 35 PGS registered on the IFOAM website are located in East Africa (Tanzania, Rwanda, Uganda, Burundi, Kenya) and South Africa.

**Institutional development**

In 2019, Biological Systems Consulting & Research assessed the status of organic agriculture\(^*\). According to them, most of the large producers and exporters of organic products are either Active or Advanced EOA countries, which means there seems to be a connection between production and institutional development. There are a few exceptions such as South Africa and Cote d’Ivoire. In these countries, large commercial farmers manage to produce and export large volumes for international markets without much support from government or sector organisations.

On continental level, a few institutions are worth mentioning. In 2011, the African Union started the Ecological Organic Agriculture Initiative (EOA-I). 9 countries participate in the EOA-I: Benin, Ethiopia, Kenya, Rwanda, Mali, Nigeria, Senegal, Tanzania and Uganda. The EOA-I has National Steering Committees chaired by representatives of the Ministries of Agriculture and a Continental Steering Committee chaired by a representative of the African Union Commission (AUC). The EOA-I has commissioned several studies to develop recommendations for improving governance structures in the organic sector. EOA-I also developed a survey tool to support the collection of relevant data on programmes and initiatives in the African organic sector. For the future, EOA-I aims to scale-up and involve more stakeholders.

For the development and exchange of knowledge on organic agriculture in Africa, the conferences co-organised by AfrONet and its affiliates play a key role. AfrONet is the umbrella body for non-state African organic stakeholders and is a member of the EOA-I’s Continental Steering Committee (CSC) and Regional/Cluster Steering Committees. AfrONet plays a key role in the organisation of the African Organic Conference (AOC) and its regional affiliates co-organise conferences in their respective regions.

AfrONet also hosts NOARA, the Network of Organic Agriculture Researchers in Africa. NOARA publicises organic agriculture research, extension and training. In 2019, the organisation launched the African Journal of Organic Agriculture and Ecology (AJOAE). Furthermore, NOARA leads the

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\(^{25}\) Auerbach, R., Myles Oelofse, Sasha Metz-LaGrange, Anne Ross and Aharon de Grass (2019). Draft Assessment of North, Central, West & Southern African Food Systems, with a view to mainstreaming Ecological Organic Agriculture
### Typology of Organic Agriculture in Africa

<table>
<thead>
<tr>
<th>Typology</th>
<th>Type</th>
<th>Organic Policy</th>
<th>Product standard</th>
<th>Government support</th>
<th>Farmers organised</th>
<th>Export &amp; Domestic market</th>
<th>Countries</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active EOA country</td>
<td>1</td>
<td>Yes</td>
<td>Yes</td>
<td>Strong</td>
<td>NOAM</td>
<td>Yes, both</td>
<td>Morocco, Tunisia</td>
<td>2</td>
</tr>
<tr>
<td>Advanced EOA country</td>
<td>2</td>
<td>Coming</td>
<td>Yes</td>
<td>Promise</td>
<td>NOAM</td>
<td>Yes, both</td>
<td>Burkina Faso, Egypt, Ghana, Madagascar, Mali, Mauritius, São Tomé &amp; Príncipe, Senegal, Seychelles, Sudan, Togo</td>
<td>11</td>
</tr>
<tr>
<td>Infant EOA country</td>
<td>3</td>
<td>No</td>
<td>Yes or No</td>
<td>Little</td>
<td>Yes</td>
<td>Yes export; domestic developing</td>
<td>Algeria, Benin, Cameroon, Liberia, Namibia, Nigeria, South Africa, Zambia, Zimbabwe,</td>
<td>9</td>
</tr>
<tr>
<td>Nascent EOA awareness</td>
<td>4</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Weak</td>
<td>Some export; little domestic</td>
<td>Cape Verde, DR Congo, Gambia, Guinea Rep, Ivory Coast, Malawi, Mauritania, Mozambique, Niger, Sierra Leone</td>
<td>10</td>
</tr>
<tr>
<td>Awaiting inspiration</td>
<td>5</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>Angola, Botswana, Central Afr Rep, Chad, Comoros, Congo Republic, Djibouti, Equator, Guinea, Eritrea, Eswatini, Gabon, Guinea Bissau, Lesotho, Libya, W. Sahara</td>
<td>15</td>
</tr>
</tbody>
</table>

The process of developing an Organic Agriculture Research Agenda for Africa 2030 using a multi-stakeholder approach.

Source: Assessment for the African Union Commission of North, West, Central and Southern Africa, with a view to mainstreaming Ecological Organic Agriculture (2020) Authors: Prof Raymond Auerbach, Dr Myles Oelofse, Ms Sasha Mentz-LaGrange, Ms Anne Ross, Dr Aharon de Grassi.Biological Systems Consulting & Research, George, Western Cape, South Africa
2.3. Southern Africa

Overview and development

In this study, Southern Africa includes the countries of Botswana, Eswatini (formerly known as Swaziland), Lesotho, Malawi, Mozambique, Namibia, South Africa, Zambia, and Zimbabwe.

The Southern African regional statistics are striking for the relatively large organic area under wild collection, which is much larger than in other African regions. Zambia, Namibia and South Africa each report over 1 million ha, with Zambia leading at 3.2 million ha, which is mostly related to beekeeping and the collection of devil’s claw. On the other hand, in terms of organic agricultural land (converted + under conversion), the Southern African region shows relatively low hectarage, 111,000 out of the total of almost 2 million hectares for Africa, with South Africa taking the largest share (82,800 ha).

In terms of number of producers, FiBL reports around 1,800 organic producers for the whole of Southern Africa. However, this is based on the number of operational internal control systems (ICS) and not on the number of actual farmers/wild harvesters associated with each ICS. This number would be much greater, given that for example one baobab wild collection operation in Zimbabwe has 5,568 organically-certified wild collectors for one ICS. In total, 163 organic exporters are reported by FiBL, while Ecocert SA operating in all of Southern Africa estimates the number of organic operators at 350-400 for Southern Africa.

Organic agriculture is not new to Southern Africa, and the region is now in its second or third generation of organic production. The first wave of early adopters in the 1980s and 1990s were primarily engaged with small-scale farmers, although there were a few notable large-scale producers (e.g. Pirimiti in Malawi). Gradually these early adopters have fallen away, to be replaced by the new generation of producers, driven by much more large-scale commercial interests. In parallel, there has been a significant growth in the production of wild harvested natural ingredients, driven by organisations like PhytoTrade Africa, and this is where the biggest growth in numbers of smallholders has been experienced.

The organic sector in the different countries is organised and supported in various ways, but the overall sector in the region is fractured and poorly coordinated. For the whole region, stakeholders established the IFOAM’s Southern African Network (ISAN) to develop and unite organic agriculture in the region but ISAN reports that there are limited regular or recent activities.

Summarised, after South Africa, Malawi, Namibia, Zambia and Zimbabwe show most activity in the field of organics, with NGO programs, some guideline development and exports, but with limited government support. Mozambique also shows NGO capacity, but no guidelines or support. Botswana, Eswatini and Lesotho have very little institutional capacity, no government support and are not exporting. Below, only the most active countries are further described. For South Africa, as selected priority country in this report, there will be a separate chapter.

Malawi was one of the pioneers of the organic agriculture movement in southern Africa, with a very active Shiri Highlands Organic Growers Association in the 1990s. Today it has 295 certified producers, representing some 20,000 small-scale farmers, farming 11,996 ha of organic land. The farmers are organised through the effective Malawi Organic Growers Association (MOGA). Popular organic crops include garlic, ginger, cereals, maize, soya, legumes, coffee, tea and vegetables.

The Namibian Organic Association (NOA) is a dynamic organisation which has developed organic standards based on the IFOAM standards and has also supported the emergence of PGS. The

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26 Willer et al., 2020. The world of organic agriculture.
organisation mentions that organic livestock management is in its infancy, with still few farms certified organic by NOA. The NOA has been pro-active in lobbying government and international NGOs, and there is broad support for mainstreaming organic agriculture in Namibia. The over 1 million ha of organic wild collection supplies a range of different products, the largest of which is Devil’s Claw, an internationally renowned herbal medicinal product.

In 2017, Zambia had the second-largest area of land under organic wild harvesting in the world (nearly 6 million hectares). Much of this was devoted to beekeeping in the expansive North-Western Province of the country. However, this declined by nearly 50% in 2018 to 3.2 million hectares. The country has also experienced a move away from certified organic agriculture by many farmers in recent years. This is partly a perception issue around the superior yields of conventional farmers, but is also related to the fact that the once-vibrant OPPAZ, the Organic Producers and Processors Association Zambia, has not been active for some years. Whilst Zambia is best-known for its innovative conservation farming practices (promoted by the Conservation Farming Unit), the Zambia Alliance for Agroecology and Biodiversity (ZAAB) and Kasisi Agricultural Training Centre (KATC) have been actively promoting the adoption of agroecology practices, including demonstration sites.

In Zimbabwe, ZOPPA is the national movement for organic agriculture and it is quite active. Several certification bodies operate in Zimbabwe, notably Ecocert. A ZOPPA report states that the Standards Association of Zimbabwe has incorporated Zimbabwe’s organic standards based on PGS. On national level, the Zim-Organic brand and trademark is in place – with only certified farmers able to use the Zim-Organic label on their products. Zimbabwe also has a growing area under wild collection, supplying a range of natural ingredients including baobab, marula, kigelia, ximenia, mongongo, resurrection bush, mafura, Devils’ Claw and hibiscus. A recent investment by a major German organic company (Martin Bauer Group GmbH) has seen the establishment of a new organic agricultural training centre aimed at smallholder farmers. The Zimbabwean Government is in the process of developing a new agricultural policy and is keen to incorporate a component on organic agriculture.

In following country sections, more detailed information can be found for South Africa.

Southern Africa organic production

**Infographic Southern African organic production**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified agriculture land:</td>
<td>111,643 ha</td>
</tr>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>7,066,313 ha</td>
</tr>
<tr>
<td>Percentage of Agriculture (% organic agriculture land in total agriculture land):</td>
<td>0,05%</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>1,806</td>
</tr>
</tbody>
</table>
### Table: Products and production in Southern Africa

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAP (wild collection)</td>
<td>a) 2,749,491</td>
<td>c) 7,500</td>
<td>n/a</td>
<td>This figure includes land from which a variety of products are wild-harvested, including baobab</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>d) Assumption: all honey at EUR 2/kg</td>
</tr>
<tr>
<td>Forest honey</td>
<td>a) 2,500,000</td>
<td>a) 825</td>
<td>d) 1.7 million</td>
<td></td>
</tr>
<tr>
<td>Coconut</td>
<td>a) 785,000</td>
<td>a) 3,500</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Nuts (Mongongo, wild collection)</td>
<td>a) 700,000</td>
<td>c) 200&lt;sup&gt;27&lt;/sup&gt;</td>
<td>n/a</td>
<td>This figure relates to land from which only nuts are wild-harvested</td>
</tr>
<tr>
<td>Cereals</td>
<td>a) 5</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Fruit (wild collection)</td>
<td>a) 282,002</td>
<td>c) 1,800&lt;sup&gt;28&lt;/sup&gt;</td>
<td>n/a</td>
<td>This figure relates to land from which only wild fruits (marula, ximenia) are wild-harvested</td>
</tr>
<tr>
<td>Baobab (wild collection)</td>
<td>a) 28,000</td>
<td>a) 140</td>
<td>n/a</td>
<td>This figure relates to land from which only baobab is wild-harvested</td>
</tr>
<tr>
<td>Sugarcane</td>
<td>a) 9,736</td>
<td>a) 72,000</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Rose hips</td>
<td>a) 21,788</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Oilseeds</td>
<td>a) 12,092</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Bee products</td>
<td>n/a</td>
<td>a) 1,646</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Fresh vegetables</td>
<td>a) 1,352</td>
<td>a) 3,339</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Tea</td>
<td>a) 4,658</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

We differentiate between a) FiBL statistics b) other statistics c) resource person’s estimates d) own estimates and e) not available (e.g. through different colors).

This table clearly shows the heavy bias within Southern Africa towards wild collection, with a significant number of the different product categories being met either fully (MAPs, forest honey, nuts, fruits, baobab, bee products) or partly (coconut, rose hips, tea) through wild collectors. Of the wholly farmed products, oilseeds and sugar cane form the largest production areas, followed by tea and fresh vegetables. The growth in production from wild collection is a reflection of the increasing demand for non-traditional organic products, feeding into the fast-growing global wellness industry. This is further enhanced by the fact that many of the wild collection operations are perceived as having strong fair trade credentials, appealing to the new generation of ethical consumers. Wild

<sup>27</sup> Estimated quantities of fresh plant material as follows: Devils claw: 600 tonnes, Baobab fruit: 2,500 tonnes, Tagetes plants: 100 tonnes, Kigelia fruit: 20 tonnes, Resurrection bush: 50 tonnes, Strophanthus pods: 20 tonnes Aloe ferox leaf material: 1,600 tonnes, Essential oil plants: 2,500 tonnes

<sup>28</sup> Estimated quantities of wild collected fruit as follows: Marula 1,500 tonnes, Ximenia 300 tonnes
collection in Southern Africa is likely to continue experiencing upward growth for several years to come, with many new products and ingredients under development and many new marketing approaches being tried out (e.g. steps to get marula oil registered as a Novel Food within the EU, which could unlock a sizeable new market for organic marula oil).

As well as expanding existing organic production, there are also long-term opportunities from the progressive conversion to organic of several agricultural products currently exported entirely as conventional. One of these is likely to be in organic livestock. The overlapping concepts of “grass-fed” and “organic” have seen substantial growth in organic beef production in Australia, and it would be surprising if this wasn’t replicated in Southern Africa, whose large rangeland areas in the more arid west of the region favour extensive livestock production. Another opportunity, confined at present to three countries in the region, relates to organic hemp and/or cannabidiol (CBD) products, with both South Africa, Lesotho and Zimbabwe having recently licensed the production of hemp/marijuana under carefully controlled conditions. Zimbabwe in particular is expecting rapid growth in this sector, although none of the producers there have currently explored options for organic certification. In South Africa, on the other hand, some first producers have started to seek certification.

Other currently conventional exports suitable for conversion to organic would include tea and coffee (Malawi, Mozambique and Zimbabwe), horticultural produce (Zambia, Malawi, Zimbabwe, Mozambique and South Africa), cut flowers (Zambia, Zimbabwe, Mozambique and South Africa), pot pourri and citrus (South Africa), macadamia nuts (South Africa, Zimbabwe, Mozambique, Malawi) and avocados (South Africa, Zimbabwe, Mozambique, Malawi).

**Southern Africa organic market**

*Infographic Southern African organic market*

<table>
<thead>
<tr>
<th>Main products for interregional export markets:</th>
<th>MAPs, honey, coconut, sugar cane, cereals, rose hips, tea, oilseeds, and fresh vegetables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main products for domestic and regional markets:</td>
<td>Fresh vegetables, honey, MAPs, tea and cereals</td>
</tr>
<tr>
<td>Total volume of the exports:</td>
<td>27,745 tonnes to EU in 2019 &amp; 86 tonnes to USA in 2019</td>
</tr>
<tr>
<td>Total value of the exports:</td>
<td>n/a</td>
</tr>
<tr>
<td>Number of operators that are exporting from Southern Africa:</td>
<td>163</td>
</tr>
</tbody>
</table>

*We differentiate between a) FiBL statistics b) other statistics c) resource person’s estimates d) own estimates.*
The organic market within Southern Africa is small, and heavily skewed towards South Africa, which serves both as an end market for the other countries and as a transit route through which re-exports take place. It imports raw materials from its neighbouring countries (and also from other African countries), processes them at dedicated organic production facilities and then exports value-added produce. This is largely due to the superior industrial infrastructure in South Africa, which makes it more cost-effective for operators around the region to send their produce to South Africa for processing than to process in their own countries.

The organic consumer products available in South Africa are very diverse (from fresh to cosmetics to even pet food) and domestic demand is growing rapidly, but in the rest of the Southern Africa region, the primary demand for organic comes for fruit and vegetables, with a smaller but growing interest in cosmetics and personal care products.

Regarding imports to the EU from the Southern African region, South Africa is the largest exporter with 25,430 tonnes in 2019 (91.7% of the regional total), showing an almost 10% increase of exports compared to 2018 and representing a 0.8% share of total EU imports. Mozambique follows with 1,216 tonnes (4.4% of the regional total), leaving the remaining seven countries in the region sharing less than 4% of the regional total between them.

Conclusions

Southern Africa is a region of enormous disparity, combining Africa’s second-largest (South Africa) with some of its smallest and poorest economies. This disparity is reflected in the statistics, with 75% of the region’s organic exporters being based in South Africa, collectively responsible for nearly 92% of the region’s organic exports to the EU. This disparity notwithstanding, the existence of South Africa as both a major producer and consumer of organic produce in the region constitutes a significant opportunity for other countries within the region, and South Africa has the potential to drive growth in the organic sector across the whole region and the African continent.

Local demand for organic produce is limited in most countries within the region (with the exception of South Africa), and awareness levels amongst consumers of the benefits of organic produce are almost non-existent. In recent years there has been some growth in demand for organically-grown food. This is mainly driven by health concerns. However, the majority of consumers are not yet sensitised to the distinction between self-claimed and independently verified organic status. This acts as a disincentive to bona fide organic growers. Consequently, in most countries within the region, the only certified organic growers are exporters. The situation is different in South Africa, where local demand for organic produce is consistently said to outstrip supply.

Perhaps the biggest threat to organic production in the region comes from the widely-held perception that yields for organic agriculture are far lower than yields for conventional agriculture, despite the fact that long term South African research shows this to be untrue. In a region where food security is threatened by a regular and increasingly frequent cycle of drought, yields are an overwhelming concern for the majority of farmers. There is also entrenched resistance to organic agriculture from large scale agribusinesses, who continue to place heavy emphasis on the use of poisons, synthetic fertilisers, GMOs and biotechnology.

The growth in production from wild collection is a reflection of the increasing demand for non-traditional organic products, feeding into the fast-growing global wellness industry and demand for ethically sourced produce with a story. For the future, opportunities are observed in the field of organic livestock and in the production of organic hemp and/or cannabidiol (CBD) products as part of the fast growing health supplements segment. Other currently conventional exports suitable for conversion to organic would include tea and coffee, horticultural produce, cut flowers, pot pourri, macadamia nuts and avocados.

Key steps towards the promotion and further development of the poorly coordinated organic sector in the region would include the further support and activation of ISAN, engagement with key national and regional stakeholders, identification and promotion of “Champion” organic producers and
exporters, support for production trials to minimise yield losses through organic conversion, consumer awareness campaigns and support for national and regional organic trade fairs. It is important to support the private sector, as in the end it is this limited number of entrepreneurs that so far have taken most of the risk to drive the organic production and trade.

Overall, then, it is evident that there is very significant growth potential in the Southern African organic sector. Domestic consumers are slowly waking up to the health benefits of organic produce, and this will drive increasingly rapid growth in local demand. At the same time, the opportunities in a post-COVID world for tapping into the global market for natural products will inevitably fuel increased supplies of new and existing wild collected ingredients. Despite the enduring infrastructural challenges, there is every reason to view the future of organic production and consumption in the region with optimism and hope.
2.4. East Africa

Overview and development

According to the division of SWAC/OECD, the East Africa region includes the countries of Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Mauritius, Rwanda, Seychelles, Somalia, South Sudan, Sudan, Tanzania, and Uganda. East Africa is very heterogenous in terms of agroecological zones, ranging from dry zones to very productive agricultural highlands and valleys.

Part of the organic movement in East Africa region is relatively well organised, with active National Organic Agriculture Movements (NOAMs) in Burundi (BOAM), Kenya (KOAN), Rwanda (ROAM), Tanzania (TOAM) and Uganda (NOGAMU). The island countries show a small but quite active local organic movement, with Mauritius even aiming to transform the island into an organic island, but apart from organic sugar from Mauritius and different products from Madagascar, organic production is not export oriented for the islands. For Madagascar, there is a umbrella organisation (SYMABIO) and a small, active trade group of vanilla agriculture operators, organised in PROMABIO. For the other countries, with limited history in organic farming and limited export numbers, no active national movements exist. Ethiopia shows increasing numbers for organic production and exports, mostly coffee following falling global coffee prices, but it does not have much history in organic and there is no organised promotion at national level yet, but it is expected to change over the coming years.

Certification Bodies (CBs) are active in all the countries, but only in exceptional cases there are functional local certification bodies. Kenya (with Encert) is one of them. In Tanzania, Tancert operates at very low capacity while UgoCert in Uganda lost all accreditations.

The countries with active NOAMs received support through various donor programs of which the following are most notable to mention here:

- EPOPA, OSEA and OTEA programmes running between 1997 – 2019 (Sida funded)
- Initiative on Ecological Organic Agriculture (EOA), 2014-current (SDC and SSNC funded)
- Knowledge Centre for Organic Agriculture (KCOA), 2019-21 (BMZ funded)

Due to efforts of the different NOAMs and ongoing support of the Sida programmes the region has adopted an East African Organic Products Standard (EAOPS) in 2007 and the subsequent establishment of the East African Organic Mark (EAOM) which provided the fundamentals for further development of the local and regional markets. Both have laid the foundation for the development of an Organic Guarantee System and emerging consumer awareness, aiming to further develop of organic value chains and ensuring regional trade growth in order for East African farmers to benefit from the rapidly growing market for organic products.

It should be noted, that at national level, none of the East African countries has updated their national standards’ catalogues to include the revised EAOPS; most governments in the region prefer to have organic agriculture (OA) to be mainstreamed in other aspects of agricultural development. Regarding the EAOM, the recognition and use of the ‘Kilimohai’ Trade Mark in the region has remained rather low. Most products are traded in open markets (most preferred according to consumer survey) with customer relations based on trust and offering no premium prices and hence no incentive to use the Mark. The KCOA in Eastern Africa so far involves four countries: Kenya, Uganda, Rwanda, and Tanzania. Expectation is to later bring on board Ethiopia and Burundi. The Biovision Africa Trust (BvAT) is the

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29 Sida’s evaluation reports of EPOPA and OTEA
lead coordinating agency of the project in Eastern Africa, with the Participatory Ecological Land Use Management (PELUM) in Uganda as a co-host.

In following country sections, more detailed information can be found for Uganda and Kenya.

**East Africa organic production**

*Infographic East African organic production*

<table>
<thead>
<tr>
<th>Organic certified agriculture land:</th>
<th>1,011,365 ha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>3,544,168 ha</td>
</tr>
<tr>
<td>Percentage of Agriculture (% organic agriculture land in total agriculture land):</td>
<td>0.56%</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>636,795</td>
</tr>
</tbody>
</table>

Some countries have a long history of organic production like Kenya and Uganda. Ethiopia has a significant organic production and a high number of organic farmers (more than 200,000 smallholders, with farms comprising on average 1 ha; data from 2017, published in 2019). They produce organic coffee, sesame, honey and some other products (e.g. beeswax, pineapples, cereals, apples, cactus figs, corn and mango). Some 200,000 ha (0.5% of agriculture land) of the Ethiopian land is managed organically, and the sector is growing. For the time being, lack of knowledge and infrastructure hamper an increased export, and there is still little activity in the field of processing of organic foods.

**Table: Organic products and production in East Africa, in 2018:**

<table>
<thead>
<tr>
<th>Product</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apiculture</td>
<td>a) 2,525,441</td>
<td>a) 1,022</td>
<td>d) 2 million</td>
<td>d) Assumption: all honey at EUR 2 /kg</td>
</tr>
<tr>
<td>Gums</td>
<td>a) 864,902</td>
<td>a) 7,083</td>
<td>d) 21 million</td>
<td>d) Assumption: EUR 3/kg</td>
</tr>
<tr>
<td>Coffee</td>
<td>a) 310,001</td>
<td>a) 58,360</td>
<td>d) 128 million</td>
<td>d) Assumption: EUR 2.2/kg</td>
</tr>
<tr>
<td>Sesame</td>
<td>a) 71,923</td>
<td>a) 19,501</td>
<td>d) 21 million</td>
<td>d) Assumption: EUR 1.1/kg</td>
</tr>
<tr>
<td>MAPs (cultivated)</td>
<td>a) 47,427</td>
<td>a) 127,134</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>
Macadamia   a) 50,537  a) 70,000  d)  
Cashew nuts  a) 19,245  a) 20,000  d) 168 million  d) Assumption: EUR 8.4 /kg
Tropical fruit a) 21,273  a) 53,962  n/a  
Cocoa   a) 37,836  a) 17,007  d) 44 million  d) Assumption: EUR 2.6 /kg
Cotton   a) 92,602  a) 2,557  d) 5 million  d) Assumption: EUR 2.0 /kg
Tea   a) 1.627  a) 3,761  
Citrus fruit  a) 33  a) 1,050  n/a  
Shea nuts a) 79,090  n/a  n/a  

We differentiate between a) FiBL statistics b) other statistics c) resource person’s estimates d) own estimates.

Countries contributing most to the organic production figures above are:

- Honey & bees wax: Kenya, Uganda, Tanzania, Ethiopia
- Gums & resins, and oils thereof: Uganda, Kenya, Ethiopia
- Coffee: Kenya, Tanzania, Ethiopia, Uganda, Rwanda
- Sesame: Ethiopia
- Cashew: Tanzania, Kenya, Uganda
- Tropical Fruit: Kenya, Uganda, Rwanda, Tanzania
- Tea: Kenya, Rwanda, Tanzania
- Cocoa: Uganda, Tanzania, Madagascar
- Cotton: Ethiopia, Uganda, Tanzania

East Africa organic market

Some countries in East Africa have a longer and richer history of relatively higher volumes and value of organic products being traded, like Kenya and Uganda, other countries are coming up a bit like Ethiopia, Madagascar and Rwanda, many others still remain at low levels. There is some regional trade between Kenya, Uganda and Tanzania, but there are no concrete figures to support this. Markets are not coordinated, standardised, nor transparent, and systematic national and regional data are not available. Information mostly comes from impressions of resource persons.

Export markets clearly dominate the organic trade picture, with some dynamic growth because of increased demand. Local sales are mostly based on self-claims (‘default’ or ‘natural’) or on PGS. In traditionally stronger organic countries like Uganda and Kenya, and in upcoming organic countries like Ethiopia and Rwanda, local markets are increasing but need more concerted effort to reach scale beyond traditionally stronger export products and pioneer initiatives. In Ethiopia the Institute for Sustainable Development (ISD) has laid a ground to start PGS. Even if the domestic market in Ethiopia is still at an infant stage, there is now an organic bazar in Addis Ababa once a month, and reportedly there are now supplies of non-certified organic pineapple, cactus and mango juice, jams and cosmetics going to major retailers and supermarkets.

In the retail sectors in East African countries, organic produce is all but visible, or to a very marginal extent. In informal local (‘wet’) markets, it is most of the time not possible to distinguish between conventional and organic, and if said to be organic, there is very little proof of the extent of being organic; sometimes referred to ‘organic by default’ or ‘naturally produced’. In this sense, the current demand by consumers for ‘food-safe’ products can be a good driver for local organic markets to grow, as well as for giving farmers a better return on their hard work with fair pricing.
Infographic East African organic market

Main products for interregional export markets:
Coffee, nuts (cashew nuts, macadamia), MAPS, tea, cotton, cocoa, sesame, gums

Main products for domestic and regional markets:
n/a

Total volume of the exports:
48,930 tonnes to EU
& 5,287 tonnes to USA in 2019

Total value of the exports:
n/a

Number of operators that are exporting from East Africa:
323

We differentiate between a) FiBL statistics b) other statistics c) own estimates d) resource person estimates.

Conclusions
While East Africa as a region used to be quite strong in organic production and trade, growth apparently slowed down in comparison with other African regions. Demand continued to be good, but it appears that a non-conducive trade environment and limited support from Government levels have limited growth.

The lessons learned as described in Sida’s evaluation and in Biovision AT’s annual report point to the institutional challenges (insufficient recognitions at national policy levels; struggles within national organic movements) and limited enabling environment that hamper formal development of the organic sector. This is now addressed by the Initiative on Ecological Organic Agriculture (EOA-I), Biovision Africa Trust (BvAT), PELUM Kenya and others.

Next to this initiative, the GIZ supported network of regional Knowledge Hubs for Organic Agriculture in Africa, could be instrumental to address the serious shortfall of available data in the organic sector in East Africa. Unlocking the potential of organic agriculture requires in-depth understanding of ecological interrelationships and extensive knowledge of practices in agricultural production, processing and marketing.

More striking however, from all the above analyses, is the realisation of an absence of the private sector in any of the policies and strategies that have been designed and implemented over the years. The private sector is key to unlocking the potential of the organic sector.

Even though there are several (national) trade fairs in the region, the outcomes of these events are not reported or monitored. In addition, and as far as could be established for fact, there are no functional trade platforms for the organic private sector, except for some networks and associations. Highest priority will be to draw in the private sector as a driver for developing the organic m and to help set the stage for national policies (regarding products and markets, diversification and value addition/processing).
2.5. Central Africa

Overview and development

In this study, Central Africa includes the countries of Angola, Cameroon, Central African Republic, Chad, Democratic Republic of Congo (DRC), Republic of the Congo, Equatorial Guinea, Gabon and Sao Tome and Principe.

Out of those countries, only DRC, Sao Tome, Cameroon and Chad have certified organic areas. While DRC and Sao Tome and Principe only have organic agriculture land and Chad only has wild collection areas, Cameroon has both. However, though not part of the statistics, there are scattered productions initiatives in other countries, too. Examples include honey production in the Republic of Congo, local (non-certified) organic vegetables in Brazzaville from 380 producers or the Dulce Maria farm in Angola producing according to organic principles and permaculture on 5,000 ha.

DRC has the most developed organic trade in Central Africa with 30,000 producers, 22 processors and 19 exporters, which are mostly donor supported cocoa (>80%) and coffee cooperatives that sell on the world market. However, it has no specialised organic institutions and no organised national organic movement. CEDAP is a non-profit organisation that promotes among others organic agriculture in the Eastern part of DRC. While trade governance and security in the country overall is rated as very problematic, DRC has a lot of potential with high biodiversity and a lot of fallow very fertile land with a population that really needs opportunities and income.

Sao Tome and Principe is very small but the country has an organic strategy in place and sells a high share of its cocoa exports with organic and fair trade. It had been supported through an IFAD project and is now also part of the West Africa oriented OM4D project of IFOAM Organics International. With 22.5% it has the highest share of organic agriculture land of whole Africa and it is 4th in the world. The main export product is Cocoa produced and marketed through cooperatives and there are also high potentials for food for the tourism industry and for ecoservices.

Cameroon is the only Central African country that has a small organic agriculture movement that goes back to 1996, when Biofil was created and supported by various NGOs. Cameroon is also part of AfrONet and planned to host the African Organic conference in 2018, but it did not manage to convene it and the conference was moved to Senegal. To date, the movement has come up with a few innovative ideas (e.g. marketing traditional chicken for a good price thanks to the good taste of meat), but it never managed to be a convening force for the sector. With 1,000 ha agriculture land and 40,000 ha wild collection, 500 producers and 19 exporters, it is relatively small even in African terms. There were various development projects (World Bank, CIRAD/INRA, FAO, GIZ, Brot für die Welt) that support research and innovations e.g. at CIRAD. In 2006 and 2009 there were attempts for an organic regulation, which did not lead to a result.

Little information about organic in Chad is available that has apparently an informal network of environmental NGOs and organic actors active in wild collection on 120,000 ha and that are marketing their products to 4 exporters. On top, there are local organic producers offering their products on a Saturday morning market in N'Djamena.

In conclusion, Central Africa is the least developed organic region, with a few countries starting to develop organic production and marketing. The continental movement is challenged to realise the

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30 Willer et al., 2020. The world of organic agriculture
31 http://queenb.pro/
opportunities, to convey the learnings from other countries and to include this part of the continent into the developments. A KCOA for Central Africa is planned for the near future.

**Central Africa organic production**

**Infographic Central African organic production**

- Organic certified agriculture land: 72,811 ha
- Organic certified other areas (wild collection): 166,800 ha
- Percentage of organic agriculture land in total agriculture land: High in Sao Tome and Principe (22%) and low (0.1-0.2%) in other countries
- Organic producers: 34,250

<table>
<thead>
<tr>
<th>Product</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apiculture (wild)</td>
<td>a) 47,000</td>
<td>a) 1,447</td>
<td>d) 3 million</td>
<td>d) Assumption: all honey at EUR 2/kg</td>
</tr>
<tr>
<td>Gum acacia (wild)</td>
<td>a) 116,330</td>
<td>a) 3,250</td>
<td>d) 10 million</td>
<td>d) Assumption: EUR 3/kg</td>
</tr>
<tr>
<td>Tropical fruit</td>
<td>a) 514</td>
<td>a) 2,312</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Cocoa</td>
<td>a) 52,427</td>
<td>a) 1,664</td>
<td>d) 4 million</td>
<td>d) Assumption: EUR 2.6/kg</td>
</tr>
<tr>
<td>Coffee</td>
<td>a) 8,798</td>
<td>a) 447</td>
<td>n/a.</td>
<td></td>
</tr>
</tbody>
</table>

*Table: Products and production in Central Africa*

Production in Central Africa emerges on four levels. Firstly, of export production of commodities of cooperatives mostly in cocoa and coffee and potentially in tropical vegetables and fruits for the international processing industry. We see this in Sao Tome, DRC and to a small extent also in Cameroon. Secondly, there are some rare and high value wild collection products that have an international market, such as gums and resins, which is a business model in Cameroon and Chad. Thirdly, there is local production that we can call “organic by default”, with producers that either are or aren’t aware of their organic production methods. Finally, there are also individual initiatives that introduce non-certified organic by design either on a single farm or in a cooperation with a group of farmers. For trade development, the first two groups are most relevant.
### Central Africa organic market

**Infographic Central African organic market**

<table>
<thead>
<tr>
<th><strong>Main products for interregional export markets:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gum acacia, cocoa, honey</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Main products for domestic and regional markets:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Total volume of the exports:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>13,826 tonnes to EU in 2018 &amp; 398 tonnes to USA in 2019</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Total value of the exports:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Number of operators that are exporting from Central Africa:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>48</td>
<td></td>
</tr>
</tbody>
</table>

The organic market in Central Africa is not transparent, but there is international (certified) and national (non-certified) trade going on. There is only one PGS in the region, which is under development in Cameroon. Apart from the usual normal local trade with no differentiation between organic and conventional, there are emerging direct marketing and farmers markets particularly to people concerned about food safety and to wealthier segments in cities. Such initiatives take place in Cameroon, Chad, in the Republic of Congo and in Angola.

### Conclusions

Organic in Central Africa is only emerging, despite the fact that the potentials are huge and that there is a lot of organic by default. The fragile political stability, the incidences of war and terrorism, the weak and unreliable governance, the undeveloped physical and institutional infrastructure and low education, literacy and awareness make it difficult to invest in and develop organic systems with high requirements.

Focus of organic development support ought to lie first of all in food security and building resilience for smallholder family farmers and local consumption with the opportunity to make some extra cash. On sector level, development projects may be well-advised to take learnings and knowledge e.g. from the Africa Organic Manual or the upcoming published knowledge of the organic knowledge hubs in the neighbouring regions to support awareness at production level. It may also support building resilience and developments from organic by default to organic by design without using the usual price premium as engine of development. Smart local and informal trade in specialty value chains may as well support that development.

At the same time, following the first mentioned two levels of production (export-oriented production of cocoa, coffee and (processed) tropical fruits and wild collected MAPs), promising entrepreneurs should be supported when investing in setting up production, processing and exports. Public Private Partnership (PPP) investment models are good examples of intervention strategies following from the conventional sector.
2.6. West Africa

Overview and development

The West Africa region includes the countries of Benin, Burkina Faso, Cape Verde, Ivory Coast, Gambia, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, and Togo. The region is very heterogenous in terms of agroecological zones. Very dry and hot in the North and rainforests along the coasts in the South.

Burkina Faso is the country with the longest history of organic agriculture, but also countries like Mali, Senegal, Nigeria, Ghana and Benin have a tradition and an own history of Organic Agriculture. Countries such as Togo, Sierra Leone and Ivory Coast have a relevant volume of organic agriculture and trade, but with mixed supporting structures and representation in the regional, continental and global organic movements. In Guinea, Gambia, Guinea Bissau, Liberia, Cape Verde and Niger there is very little organic agriculture production available.

Compared to the other regions, West Africa leaves a mixed picture when it comes to the organic sector. In the region, there is no country with a regulation and contrary to East and Southern Africa only Burkina Faso and Senegal had serious attempts to develop local or national standards on their own. Most countries have no reference to organic in their agriculture policies and hardly any measures are taken to promote organic agriculture. An exception is the organic desk in the ministry of agriculture and mention in the national investment plan in Ghana or the inclusion in the subsidy policy in Burkina Faso.

At the same time, in no other region, the discussion on agroecology is as much advanced as in West Africa, particularly in the French speaking countries, where specialised NGOs lead the discussion and actively advocate. There is an active regional organic movement that is organised in the West Africa Organic Network (WAfRONet), which is registered in Senegal. The secretariat is presently hosted by FENAB, Senegal. It was created based on the inspiration of the East African Standard in 2007 and a first conference in Abeokuta in Nigeria in 2008 took place with biannual following regional conferences. The last of these conferences were in Mali in 2017 and in Ghana in 2019 with about 300 participants. West Africa also hosted the Continental African Organic conferences 2018 in Senegal and 2015 in Nigeria.

The West African region is supported by different donor funded projects, of which the following four are relevant to mention here:

- The EOA-I covers Nigeria, Benin, Mali and Senegal. It aligns its outputs with CAADP (Africa’s policy framework for agricultural transformation) and addresses institutional infrastructure, knowledge, value chains and integration into national and regional policies.
- ECOVAS implements the West Africa Agroecological Transition Support Project (PATAE) supported by France covering 5 countries, namely Burkina Faso, Mali, Senegal, Ivory Coast and Togo to transition to agroecological intensification. It plans to extend to all 15 ECOWAS countries.
- The IFOAM Organics International and Agroeco implemented OM4D project covers Burkina Faso, Togo and Ghana. It promotes local and international markets and supports organic institutions in the target countries.
- The KCOA Knowledge Hub for Organic Agriculture in West Africa operates from Senegal with the lead of ENDA Pronat, FENAB and Agrecol Afrique. It collects, verifies and disseminates knowledge and is implemented in cooperation with partner organisations in Senegal, Mali, Gambia, Benin and Nigeria.
A few countries have a strong national organic umbrella organisation including Nigeria, Burkina Faso and Senegal and to some extent also Ghana, Benin, Mali and Togo (the latter since end of 2019). Except for Nicert in Nigeria (operating with international CBs), all certification bodies operating in the region are international with Ecocert having a chapter in Burkina Faso. Other support functions such as advisory services or research (e.g. soil science research at the University of Ibadan in Nigeria or at FARA) or vocational training (Ghana institute of Organic Farming) exist. Also, there are local (e.g. Songhai in Benin) and international NGOs (e.g. Groundswell in Ghana) promoting ecological organic agriculture.

The big driver of the development of certified organic production in the region however, is export mostly to the EU which has grown dynamically in the past few years. The value chains are dominated by international/joint venture companies and investors. They are vertically organised along the value chain and have little connections with the organic sector as a whole.

In following country sections, more detailed information can be found for Burkina Faso and Togo.

**West Africa organic production**

*Infographic West African organic production*

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified agriculture land:</td>
<td>374,974 ha</td>
</tr>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>383,264 ha</td>
</tr>
<tr>
<td>Percentage of organic agriculture land (of total agriculture land):</td>
<td>0,39%</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>107,117</td>
</tr>
</tbody>
</table>

Production is strongly oriented to the export markets and to a limited number of products. These include mainly in the order of their importance:

- Tropical fruits including juices and pulps mainly pineapples, mangoes, bananas and papayas (e.g. Togo, Sierra Leone, Ivory Coast, Benin and Burkina Faso)
- Coffee and Cocoa (Ghana, Togo, Ivory Coast)
- Cashew nuts (Burkina Faso, Mali, Senegal, Cote d’Ivoire, Benin, Ghana)
- Cotton (Mali, Burkina Faso)
- Shea butter (Burkina Faso, Ghana, Mali)
- Wild collection products such as MAP, Moringa, Baobab, etc.
**Table: Products and production in West Africa**

<table>
<thead>
<tr>
<th>Product</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocoa</td>
<td>a) 74,215</td>
<td>a) 10,217</td>
<td>d) 27 million</td>
<td>d) Assumption: EUR 2.6 /kg</td>
</tr>
<tr>
<td>Cashew nuts</td>
<td>a) 70,983</td>
<td>a) 11,193</td>
<td>d) 94 million</td>
<td>d) Assumption: EUR 8.4 /kg export price</td>
</tr>
<tr>
<td>Soybeans</td>
<td>a) 44,874</td>
<td>a) 74,910</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Coffee</td>
<td>a) 37,709</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Sesame</td>
<td>a) 24,010</td>
<td>a) 3,937</td>
<td>d) 4 million</td>
<td>d) Assumption: EUR 1.1 /kg export price</td>
</tr>
<tr>
<td>Tropical fruit</td>
<td>a) 16,607</td>
<td>a) 105,750</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Cotton</td>
<td>a) 9,452</td>
<td>a) 3,035</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>MAP (cultivated)</td>
<td>a) 3,889</td>
<td>a) 1,804</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Shea nuts (wild)</td>
<td>a) 245,563</td>
<td>a) 11,635</td>
<td>d) 7 million</td>
<td>d) Assumptions: 30% shea butter yield and EUR 2 /kg export price shea butter²⁴</td>
</tr>
<tr>
<td>Baobab (wild)</td>
<td>a) 78,738</td>
<td>a) 674</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAP (wild collection)</td>
<td>a) 1,500</td>
<td>a) 2</td>
<td>n/a.</td>
<td></td>
</tr>
</tbody>
</table>

a) FIBL statistics b) other statistics c) resource person’s estimates d) own estimates.

**West Africa organic market**

Among products that are marketed with an organic claim, the export markets clearly dominate and grow dynamically. Main products exported are tropical fruits, cocoa, coffee, cotton, shea butter and MAPs.

In various countries, e.g. Nigeria, Benin, Burkina Faso, Senegal, Ghana and Togo, local markets get more attention, but they need more time to reach scale beyond pioneer initiatives. Examples are Songhai in Benin or COBFAS under the Federal University of Agriculture in Nigeria. In Senegal, Burkina Faso, Benin, Togo and Nigeria there are PGS, but also in other countries e.g. Mali or Ghana there are reports about local trade with organic products that are not verified. In bigger cities such as Ibadan, Abuja, Lagos, Ouagadougou, Accra, Abidjan or Dakar demand for organic products emerges particularly among wealthier and concerned middle class and among expatriates, however rather occasional and unsystematic. Burkina Faso and to some extent also Senegal developed a PGS strategy and build a local market from their national umbrella organisation. For Nigeria, the size of the local organic market is estimated at about EUR 1 million, mostly vegetables such as spinach, tomatoes and local varieties followed by nuts, cereals and spices and herbs³⁵.

While the region has more regional dialog than any other organic region of Africa, we did not find much evidence of regional organic trade between the West African countries. There may be demand

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³⁴ The majority of exported value follows from shea butter that is locally processed.

³⁵ WAFRONET, 2020, personal information.
(e.g. for shea butter), however, there is little trust in organic African claims on anonymous long-distance traded products.

**Infographic West African organic market**

<table>
<thead>
<tr>
<th>Main products for interregional export markets:</th>
<th>Tropical fruits, cocoa, cashew nuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main products for domestic and regional markets:</td>
<td>n/a</td>
</tr>
<tr>
<td>Total volume of the exports:</td>
<td>79,130 tonnes to EU in 2018 &amp; 422 tonnes to USA in 2019</td>
</tr>
<tr>
<td>Total value of the exports:</td>
<td>n/a</td>
</tr>
<tr>
<td>Number of operators that are exporting from West Africa:</td>
<td>303</td>
</tr>
</tbody>
</table>

**Conclusions**

In conclusion, West Africa organic development was behind other regions for a long time. However now, it has emerged and shows more dynamics. Factors of the positive development may be a good regional coordination - no other region has such an active regional body (WAfONet) -, new donor project investments and increasing market demand for export markets combined with private sector activities of West African and European entrepreneurs.

At the same time, the organic sector in the region is not yet well rooted in consolidated national movements and the institutional support landscapes for essential functions such as quality management, public relations or sector governance is underdeveloped. The issue is not the absence of activities but the absence of transparent documentation e.g. through directories or Internet information and certain alignment of all the different initiatives. National action plans, such as those initiated by the OM4D project in Ghana, Togo and Burkina Faso may help. If institutional development lags behind, there is the risk of export-oriented single extractive commodity value chains rather than holistic system-oriented and sustainable growth of communities.

Intercontinental trade is the engine of development and it is many times bigger than local, national or regional trade together. The trade facilitation for exports takes place within value chains and usually happens directly either at/around BIOFACH in Nuremberg or through the initiative of the trading companies from Europe that are investing into their supply development. These value chains operate on their own and have limited involvement in the national organic movement. Another issue is that they concentrate on few crops and leave out others that are needed for biodiverse systems.

All in all, West Africa exemplifies a region with good coordination on regional level, but limited support structures on national level. Organic production is mostly driven by international export markets with a few products dominating. Promotion and investments into the future may be more creative and look at models that can be localised such as with shea butter or MAPs.
NORTH AFRICA

2.7. North Africa

Overview and development

North Africa is comprising the countries of Egypt, Libya, Tunisia, Algeria, Morocco, West Sahara and Mauretania. Tunisia, Egypt and Morocco are all strong in Organic Agriculture and trade. Libya and West Sahara have no organic agriculture and Mauretania has entered to the statistics only in 2020. Algeria is developing, has interesting structures and approaches, however is still in a very infant stage and statistics show very small production and trade. North Africa is relatively wealthy and developed in comparison to the rest of Africa. It makes one third of the GDP of all Africa and also has an estimated more than one third of all organic exports of Africa to the EU.

The region has a Mediterranean to arid climate. The north coast is characterised by mild, wet winters and warm dry summers, providing special opportunities to produce organically for the local and international markets. Famous examples include early potato or medical and aromatic plants from Egypt, olive oil for blends from Tunisia, citrus fruits or argon oil from Morocco or dates from all North African countries. Following the required extraction for vegetable oils, the region counts more processing facilities than the other African regions.

Governments, organic movements and the private sectors orient themselves to the market opportunities in Europe and Middle East (and in case of Tunisian Olive Oil also to North America) and see Organic as a source of income with premium prices rather than an engine of addressing environmental and social challenges. They focus on market requirements foremost on compliance with the public and private standards in the target markets even though the quality management infrastructure (e.g. labs, certification and accreditation) and culture (reliability of operators) is considered being poor. All North African countries promote their products at BIOFACH in Nuremberg and at MENOP in Dubai. There were some small national trade fair events in Morocco and Tunisia, but it is unclear if those events sustain.

The region of North Africa is not a well collaborating region with common institutions and trade relationship. There is little exchange between the countries. North Africa orients itself more to the Mediterranean and it is quite disconnected from the rest of Africa. MOAN, the Mediterranean Organic Agriculture Network, launched 1999 in Bari, Italy at CIHEAM (International Center for Advanced Mediterranean Agronomic Studies) has a Mediterranean focus and includes North Africa. In North Africa, the EU and its messages and requirements is more important than those of the African Union. For example, North African speakers in conferences - in stark contrast to other African speakers - hardly ever mentioned the decision of the African Union to promote Ecological Organic Agriculture in 2012. Likewise, the African Continental Steering Committee for Ecological Organic Agriculture has never had a North African representative, debated North African concerns nor has ever conducted a meeting in North Africa. Only recently in 2017, at the Organic World Congress (OWC) in India, the whole of organic Africa participated with a bid for the OWC 2020. Later, Morocco joined AfrONet and now the understanding of the integration of North Africa in the organic Africa community is growing and the 2021 Africa Organic Conference is planned to take place in Morocco.

The North Africa organic developments serve as learning examples and may inspire the rest of Africa. North African countries (first Tunisia, then Morocco and recently Egypt) were the first to have regulated the sector and to establish own guarantee systems. Tunisia is the only African organic system that is recognised as being equivalent by the EU and Switzerland. Tunisia takes a leading role particularly for the francophone world in issuing and implementing organic supporting policies and in sector governance. Morocco has established a strong, government legitimised organic umbrella organisation (FIMABIO) and Egypt has through Sekem inspired the world wide as an international flagship for social entrepreneurship.
Nowadays, there are increasingly projects that are working in the North and in other parts of Africa (e.g. ICS analyse of FiBL or government support from Tunisia to Madagascar and Sudan). The organic knowledge hubs include also North Africa after it had started with sub-Saharan scope only.

In following country sections, more detailed information can be found for Egypt, Tunisia and Morocco.

**North Africa organic production**

*Infographic North African organic production*

<table>
<thead>
<tr>
<th>Organic certified agriculture land:</th>
<th>413,312 ha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified area for wild collection:</td>
<td>380,515 ha</td>
</tr>
<tr>
<td>Percentage of organic agriculture (of total agriculture land):</td>
<td>n/a</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>8,767</td>
</tr>
</tbody>
</table>

**Table: Products and production in North Africa**

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olives</td>
<td>a) 243,539</td>
<td>a) 6,640</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>MAPs</td>
<td>a) 36,002</td>
<td>a) 380</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Fresh vegetables and melons</td>
<td>a) 27,938</td>
<td>a) 53,851</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>(incl. garlic, onions, pulses)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Temperate fruit</td>
<td>a) 15,002</td>
<td>a) 21,419</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Potatoes</td>
<td>a) 13,815</td>
<td>n/a.</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Cereals</td>
<td>a) 10,553</td>
<td>n/a.</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Tropical fruit</td>
<td>a) 7,530</td>
<td>n/a.</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Citrus fruit</td>
<td>a) 2,577</td>
<td>a) 19,900</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Grapes</td>
<td>a) 2,365</td>
<td>n/a.</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Textile crops</td>
<td>a) 2,319</td>
<td>n/a.</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Oilseeds</td>
<td>a) 1,740</td>
<td>n/a.</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

*Source: a) FiBL statistics*
In North Africa, 8,767 producers produce a wide range of products for the food, textile and body care products markets, in bulk, processed and as end consumer products. Production is strongly oriented to the export market. We identify various strategies of operators:

- Production for bulk markets such as olive oil, where producers compete with a low price for producing blends. The same - to a much lower extent - is true for annual oil crops and cereals.
- Products with climate advantage such as citrus fruits, dates or other subtropical fruits.
- Off season products such as early potatoes. This is the case for vegetables, where North Africa sees an opportunity to compete with south Spain for fresh vegetable production, however with the disadvantage to take a day longer to the vegetable wholesale market in Perpignan.
- Specialty products such as MAPs or long staple cotton for the industry.
- Specialty products for short chain and fair-trade markets such as dates, honey or nuts.

### North Africa organic market

**Infographic North African organic market**

<table>
<thead>
<tr>
<th>Main products for interregional export markets:</th>
<th>Olive oil, MAPs, off-season vegetables and fruit, tropical fruit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main products for domestic and regional markets:</td>
<td>n/a</td>
</tr>
<tr>
<td>Total volume of the exports:</td>
<td>121,368 tonnes to EU in 2019 &amp; 11,449 tonnes to USA in 2019</td>
</tr>
<tr>
<td>Total value of the exports:</td>
<td>n/a</td>
</tr>
<tr>
<td>Number of operators that are exporting from North Africa:</td>
<td>609</td>
</tr>
</tbody>
</table>

Compared to the other African regions, quite some processing and value addition of the local organic supply takes place in the North African countries and more than 500 processors of organic food are reported for the North African countries. While statistics are not well available, estimates of resource persons and own estimates based on qualitative information indicate that producers sell only a fraction organically and the rest goes to conventional markets. Organic production is mostly for the export industry. There are only a few cases of domestic value chains or farmers that produce for short chains markets, e.g. farmers to retail, gastronomy or directly to consumers. Estimates from resources persons (on-line survey) indicate a domestic market value between EUR 1 – 10 million mainly for fresh produce (tomatoes, cucumber), MAPs (mint) and fruits (grapes).

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Conclusions

In conclusion, North Africa is the most developed region in terms of organic production and international trade, but it is little connected to the rest of Africa. It orients itself and sees the markets in Europe and Middle East to where distance and connections are easier than to any other centre in Africa. Favourable climatic conditions and touristic potentials open markets that are growing. Governments and private sector have recognised these opportunities and they invest and develop albeit still at a low level compared to other Mediterranean countries such as Turkey or Israel. Governments and private sectors build their institutions but need to realise that they depend on the developments of the export markets.

Domestic consumption is a small, but a growing niche for affluent people and those scared of food safety issues. Price premiums - which have been an engine of development in Europe - are very big (e.g. tripling or quadrupling the price), which is an indication that the domestic markets are not well organised. On top of that, the national regulations in North Africa are not harmonized or recognized by the other countries, which creates non-tariff trade barriers. While there is a need for market facilitation and development on national and regional levels, we cannot expect regional mechanisms to become effective soon. Regional collaboration needs to start with leaders' knowledge exchange and then only trickle down to trade exchange.
2.8. South Africa

Overview and development
South Africa has a well-developed commercial agricultural sector and produces certified organic products on 82,818 ha of agricultural land and 1,538,832 ha where products are wild-collected. The country’s varied climatic zones and soils allow for diversified production. Key crops include herbs for herbal teas (rooibos, honeybush), citrus fruits, grapes (wine), tropical fruits, vegetables, cereals and various medical and aromatic plants.

South Africa has a long history of involvement in organics, with a number of organic producers and associations in existence since the 1970s. In fact, the Organic Soil Association of South Africa was one of the five founders of IFOAM in 1972. Despite this, South Africa has still not integrated organic agriculture into agricultural or trade policies. Historically, there has been active opposition to organic agriculture from a powerful agribusiness lobby, government and from the Agricultural Research Council (ARC). National organic standards development failed twice, the last time in 2015. More recently, the South Africa Organic Sector Organisation (SAOSO) developed its own organic standard and there appears to be a new openness to organic agriculture. Additionally, there has been strong pressure on the government from progressive NGOs to finalise the draft Organic Policy and the draft Agro-ecology Policy, and include them in official agricultural policies, especially in view of the climate emergency unfolding in Africa.37

Organic agriculture is not mentioned in extension planning papers, but there is a sector plan for organics, which calls for the initial training of 50 agroecology specialist extension officers, and integration of organic agriculture training into the agricultural extension curriculum in universities and training colleges.38

The absence of South African organic standards until the SAOSO organic standard was launched in 2018, is seen as one of the reasons that PGS currently play a major role in South Africa’s organic sector. Development of the PGS and of short value chains and sustainable community investment programs have helped farmer groups to realise better prices, and to build solidarity with local consumers; PGS SA works closely with SAOSO.39 Around 3,000 farmers are involved in PGS.40

Despite the lack of government support for the organic sector, organic exports have been growing. South African farmers can use certifiers accepted in the EU or North America to access those markets and South Africa has become one of the leading African countries supplying the EU market. SAOSO recently licensed Control Union to certify locally according to the SAOSO organic standard.

The KCOA in Southern Africa so far involves the following countries: Namibia, South Africa and Zambia. Expectation is to later bring on board Malawi. The Sustainability Institute (SI) is the lead coordinating agency of the project in the region and PELUM Zambia is co-host. Finally, South Africa is planning to host a trade fair for organic products for the African continent. The Organic & Natural Products Expo Africa in Johannesburg is supported by SAOSO, the Health Products Association (HPA), Slow Food South Africa and the Cosmetic Export Council of South Africa (CECOSA). The organisers chose South Africa because of the demand and potential links to exposure into civil society. They plan to invite organic sector stakeholders from other African countries through the Intern-Continental Network of Organic Farmers Organisations (INOFO). This Expo was scheduled

to take place in 2020, but South Africa has been hit particularly hard by the COVID-19 pandemic, and the Expo has been postponed to 2021.

**South Africa’s organic production**

*Infographic South Africa’s organic production*

<table>
<thead>
<tr>
<th>Organic certified agriculture land:</th>
<th>82,818 ha (converted and under conversion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>1,538,832 ha</td>
</tr>
<tr>
<td>Percentage of Agriculture (% organic agriculture land in total agriculture land):</td>
<td>0.09%</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>430 including around 300 commercial farmers</td>
</tr>
</tbody>
</table>

List of main products (up to 20 products) that are produced:

- Herbal teas (incl. around 80 rooibos farmers certified by Ecocert, and honeybush)
- Medicinal and Aromatic Plants (incl. around 30-40 essential oils suppliers, 4 aloe suppliers and 2 devil’s claw suppliers)
- Citrus fruits (incl. around 20 suppliers of oranges, lemons, grapefruits, clementines)
- Grapes (including 25 organic wine producers and 3 biodynamic wine producers)
- Vegetables (incl. 4 suppliers of pumpkins)
- Tropical fruits (incl. mangoes and avocados)
- Cereals

List of certification bodies operational in South Africa:

Ecocert, BCS, SGS, Control Union, Afrisco, Bio-Dynamic and Organic Certification Authority (BDOCA)/Debio

Data in above table are based on FiBL statistics unless mentioned otherwise.

Table: Products and production in South Africa

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grapes (wine)</td>
<td>a) 4,023</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

42 USDA AMS, 2020. Organic integrity database
43 Biodynamic Organic Wine South Africa, 2020
44 Biodynamic Organic Wine South Africa, 2020
45 USDA AMS, 2020. Organic integrity database
### Analysis

The uptake of organic farming has remained relatively low due to the lack of government support and various organisations advocating for conventional farming and the use of biotechnology to achieve higher production levels. Most farmers consider the inputs for organic farming and certification too expensive. Only a few, mostly large export-oriented companies have had the interest and resources to obtain organic certification despite the lack of government support. Smallholders have found the barriers to certification too difficult to overcome. PGS is now being supported by the GIZ Organic Knowledge Hub programme, as well as several other programmes, and training of smallholder PGS in South Africa is expanding rapidly.

In South Africa, processors play a relatively large role in the organic sector. 60% of the certified operators are processors and only 40% are farmers. In the case of grower groups, the processors manage the certification of the grower groups. For example, in the rooibos sector, one of the major sectors within the organic market, processors often organise and pay for the organic certification of the farmers who supply rooibos to them. South Africa has some of the most advanced processors in Africa. For example, many food processors have advanced food safety management systems, which are demanded by European and USA customers and are not widely available in other Southern African countries. Besides, South Africa boasts the only organically-certified cosmetic contract manufacturing facility, the only organic and Fair Wild and FSSC22000-certified baobab processing facility and the only organic contract essential oil distillation facility in the region. To illustrate the scale of this industrial advantage, although South Africa only produces some 15 tonnes of organic baobab powder itself, at least 250 tonnes of organic baobab powder were sold from South Africa in 2018 from raw material imported from Tanzania, Malawi, Mozambique, Zimbabwe, Angola and Namibia, comprising 50% of the total production from Africa.

<table>
<thead>
<tr>
<th>Product</th>
<th>Production</th>
<th>Certification</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vegetables</td>
<td>1,310</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Citrus fruit</td>
<td>1,032</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Coffee</td>
<td>4,095</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Rooibos (cultivated)</td>
<td>2,864</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Rooibos (wild-collected)</td>
<td>360,537</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Rose hips</td>
<td>15,425</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Medicinal and Aromatic Plants</td>
<td>1,162,859</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Tropical fruits (only mangos)</td>
<td>25</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>
**South Africa’s organic market**

*Infographic South Africa’s organic market*

Main products for interregional export markets:
- Citrus fruit, wine, rooibos, essential oils, fruit (fresh or dried excl. citrus & tropical fruit)

Main products for domestic and regional markets:
- Fruit, fresh or dried, excl. citrus & tropical fruit, vegetables, wine

Total volume of the exports\(^{46}\):
- 25,430 tonnes in 2019 to EU

Total value of the exports:
- 1.1 million USD to USA in 2019\(^{47}\)

Total value of the domestic market with local products:
- Around 20% of total production according to Ecocert

Number of specialised/overall outlets in the domestic market:
- Woolworths (648 non-specialised outlets)

Number of operators that are exporting from South Africa:
- 122

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Supply chains' demand

Demand for South African organic products comes from both the local market and export markets. Demand from both markets is growing and exceeds supply. Despite a lack of data, South Africa is estimated to have the largest demand for organic products in Africa, however, compared to countries in Europe and the USA, organic consumption is relatively low. South Africa does show the most diversification and innovation of organic consumer products within the region. From organic wine, cheese and olives through to baby care skin products, clothing ranges, household cleaning products and even petfood, the array of organically-certified products on the South African market is as diverse as any country worldwide. Major food and personal care retail chains (e.g. Woolworths, Checkers, Pick n Pay, Clicks) all have dedicated sections for organic produce, and consumer awareness levels of the health benefits of organic are relatively high. At the same time, the mainstreaming of organic produce has been hindered by a persistent market mismatch between the demand from these large-scale, nationwide retailers for reliable supply at low prices, and the supplies from small-scale producers that are often unpredictable and at higher than acceptable price levels. As a result, and consistent with the trends towards “craft” and “home-produced” food and beverage, there has been strong growth in the informal sector, with organic producers increasingly seeking out opportunities to sell through farmers markets, food festivals, “bakkie” trade (selling from the back of a pick-up truck), direct sales, box schemes and specialised organic restaurants.

Letters in the donuts refer to:

- a) Organic umbrella
- b) Certification, ICS & PGS
- c) Trade facilitation
- d) Research & advise
- e) Advocacy
- f) Promotion & PR
- g) Export standards
- h) Private standards & Regulation
- i) Promoting policies
- j) Trade governance

South Africa
In the export markets of the EU and USA, South Africa has the advantage of being able to produce organic products during the European and North American winter season. In 2019, South Africa supplied 46% of EU organic citrus fruit imports.48

**Supply chains’ supply**

The lack of strong policies for organic agriculture has hampered growth of supply in South Africa. Many producers lack support to apply organic farming methods successfully.

In terms of supply from smallholders, it should be noted that compatibility issues with retail giants, such as Pick ‘n Pay and Woolworths, could be causing a significant market mismatch. In short, supply of organic food may exist, but not in the right quantity, quality and variety at the right times and at the right price to match current demand. Smallholders seek out simpler and more profitable marketing channels in the informal sector.

There is a strong movement (PGS-SA) aligned with the NOAM (SAOSO), and seven active PGS groups are operating around the country (about 450 farmers involved), with several more in the planning stage.49

**Market place**

Next to BIOFACH in Germany, where South Africa is well-represented with a country pavilion, the Organic & Natural Products Expo Africa in South Africa is a major marketplace for facilitating international trade in organic products. While this trade fair focuses on the local market, international buyers and organic sector stakeholders from other African countries in the Inter-Continental Network of Organic Farmers Organisations (INOFO) are also invited to participate.

In local markets, there is a clear distinction between formal and informal markets. In the formal market, large retail chain Woolworths dominates. Other retail chains such as Pick’n Pay and Spar offer far fewer organic products and the number of specialised organic shops is limited. In the informal market, channels include ‘bakkie traders’, direct sales, box schemes, specialised restaurants and farmers’ markets.

**Supporting functions**

**Organic umbrella:** There is a strong NOAM called the South Africa Organic Sector Organisation (SAOSO). SAOSO is a voluntary organisation with no funding. The scope and range of their work is extremely inhibited. Nonetheless, SAOSO lobbies government, organises trainings, has developed organic standards, and is active in research, training, marketing and sector development.

**Advocacy:** There has recently been a move by the South African government to promote Conservation Agriculture, however moves towards Organic Conservation Agriculture have been labelled as “unrealistic”.

SAOSO continues to raise awareness and lobby for organic agriculture together with NGOs, which are promoting organic agriculture as part of a solution to climate change.

**Trade facilitation services:** Information about the South African organic market is scarce. FiBL is the only organisation that regularly collects data from certifiers. Only in 2020, SAOSO announced a directory with service and product providers. Another positive recent development in trade facilitation is the launch of

**Promotion and PR:** Promotion of organic products to South African consumers is very limited.

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Due to the coronavirus, the first edition in 2020 had to be rescheduled. An organic database with African stakeholders is not available.

Certification, ICS and PGS: Two certification bodies were set up in South Africa (Afrisco and the BioDynamic and Organic Certification Authority); by 2015, both had ceased to function, as exporters were using European certifiers (Ecocert, BCS, SGS, Control Union, Soil Association, Ceres).

PGS plays a very significant role in the South African organic sector with around 3,000 farmers involved in such schemes and 7 schemes listed in the IFOAM PGS map. Several NGOs use PGS as a platform to assist emerging small-scale farmers to enter the market with value added through organic processing and quality management. With assistance from GIZ, several training workshops have been held around the country in 2017 and 2018.

Research and Advice: The Agricultural Research Council (ARC) has done very little research on organic farming systems. Information from the ARC on organic production methods appropriate to the circumstances and needs of resource-poor farmers are nonexistent or very limited. ARC-Roodeplaat, as part of its research programme for commercial vegetables, has initiated research into organic farming systems and to assess the possibility of providing the emerging farmers with appropriate technologies to facilitate their entry into the organic market sector.

In 2016, ARC Vision 2050 was published, calling for a more sustainable approach to agriculture and natural resource management. In 2014, the National Research Foundation funded the long-term Mandela Trials to compare organic and conventional farming systems.

Rules

Export Standards: The following export standards are in use: EU organic regulations, USA National Organic Program (NOP), International Demeter Guidelines.

Promoting policies: South Africa does not have a policy to promote organic agriculture. Instead, the government strongly promotes biotechnology, GMOs and Farmer Input Subsidy Programmes. South Africa is the only country in the world whose staple food (maize) is predominantly GMO and the government provides little support to the organic sector.

Private standards and Regulations: SAOSO has developed the private Standard for Organic Production and Processing based on the IFOAM standard which has been adopted into the IFOAM Family of Standards in 2017. SAOSO recently licensed Control Union to certify against the SAOSO standards.

Comprehensive regulations for organic agriculture in South Africa are not in place.

Trade governance: The Department of Trade, Industry and Competition (DTIC) is mandated with export promotion. With support from the Swiss Import Promotion Programme (SIPPO), DTIC is currently building its capacity to improve its export promotion services for companies in the processed foods and natural ingredients sectors. Since 2020, one of DTIC’s main services to support trade in organic products is the organisation of a country pavilion for South African companies at the annual BIOFACH trade fair in Germany.

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Conclusions
South Africa has the potential to play a much bigger role in the African organic market than it currently does. The country has a strong agricultural export sector that can produce a variety of products in different climatic zones and soils and there is strong demand for organic products locally and internationally.

Despite many lobby efforts of SAOSO, South Africa still has no organic policy in place. At the political level, there is much resistance against organic agriculture. The government favours biotechnology, GMOs and farmer input subsidy programmes to achieve food security. As a result, organic agriculture remains a niche for the few companies operating in favourable conditions and with the necessary resources to invest in organic agriculture without government support. Most other companies find it difficult to obtain information or support and consider the inputs and certification too expensive.

In such a political environment, PGS emerged as a promising alternative to third-party certified organic agriculture. In terms of number of participants, South Africa has the second largest PGS sector after Uganda.

New developments such as the licensing of an accredited certification body to certify against SAOSO’s private standard, the publication of an organic directory by SAOSO, the launch of a trade fair in South Africa for natural and organic products and the new country pavilion of South Africa at BIOFACH in Nuremberg clearly indicate that private actors are still stimulating the organic sector. Appointment of 2 agro-ecological researchers to the new Board of the ARC, and major research funding for organic research, indicate that government is taking the need for research into climate resilient and sustainable production of healthy food more seriously. When the government finally supports the creation of a more conducive environment, the sector has much potential to become one of the leading organic sectors in Africa.

UGANDA

2.9. Uganda
Overview and development
Uganda has been frequently quoted as a success case of organic development. Facilitated by development projects (most notably with support of the Swedish Government), the country is seen as an example how organic export opportunities have been used for livelihood and value chain development, also putting emphasis on local market development. Statistics still show Uganda as one of the world’s leaders in terms of the number of organic producers (after India, depending year similar to Mexico and Ethiopia, yet before Kenya and Tanzania).52

Recent interest in agroecology and organic farming in Uganda originates in the early promotion of organic farming in the 1980s, pioneered by organic/biodynamic farms such as the Amfri Farm, which is still operational. Collaborative efforts within the organic movement stem from that time, when agriculture for most farmers was largely ‘organic by default’ out of poverty, and because of the civil war (with a ban on import of all inputs/chemicals). Uganda is therefore often also seen as a platform for international agroecology (academic) debate. Organic certification in Uganda dates back to 1993 with organic cotton, and in the meantime the sector has grown to more than 200,000 certified organic farmers, mostly smallholders.

Government has not been a significant driver of organic agriculture in Uganda; it has no specific agroecological or organic policies, and a draft organic policy was never approved. There are no government-funded research, organic extension services or incentives. Rather, development of Uganda’s organic sector was driven by local organic stakeholders, supported by international development efforts such as through the EPOPA project (major driver), Hivos and CBI (Netherlands), DED, ITC, UNEP/UNCTAD, and IFOAM Organics International. This led to the establishment of organic production and international market linkages. Key actors in this process were NOGAMU (umbrella for all organic sector stakeholders in Uganda), NGO partners, international experts and private export companies that mobilised farmers.

Together, they developed the Uganda Organic Standard (UOS) in line with the EU organic regulation. Subsequently, in 2007 the East African Organic Product Standard (EAOPS) and Mark (Kilimohai) were developed by the East African countries. The EAOPS has been adopted by the East African Community as a private standard for organic certification. Products are sold with the Kilimohai Mark on the domestic market, yet never got the equivalence status of the EU. Uganda has one local certification agency, Ugocert (Uganda Organic Certification Ltd.), which was established by NOGAMU in 2004.

However, in 2017 Ugocert lost its accreditation with the EU, and did not re-apply. Its activities are therefore limited to the local market, and exporters have to rely on international certification bodies such as BCS, IMO, Ceres, Ecocert, and Soil Association. Moreover, NOGAMU got into a severe institutional and managerial crisis in recent years. Assets were lost, putting further existence of staff and members at risk.

Although NOGAMU still exists, new organisations try to fill the space, such as the Eco Terra Alliance Uganda (ETAU; registered in August 2018 to promote and coordinate organic agriculture stakeholders), and GIZ’s Organic Knowledge Hub for East Africa, implemented by the Biovision Africa Trust in cooperation with Pelum Uganda.

Uganda’s organic production

*Infographic Uganda’s organic production*

<table>
<thead>
<tr>
<th>Organic certified agriculture land:</th>
<th>262,282 ha (converted and under conversion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>158,328 ha</td>
</tr>
<tr>
<td>Percentage of Agriculture:</td>
<td>1.82%</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>210,352, 15 processors, 14 exporters, 14 PGS groups (9,237 producers)</td>
</tr>
<tr>
<td>List of main products (up to 20 products) that are produced:</td>
<td></td>
</tr>
<tr>
<td>• Coffee (65,570 ha or 17.1% of total coffee area)</td>
<td>• Organic vegetables (5,245 ha or 2.1% of total vegetable area)</td>
</tr>
<tr>
<td>• Oil seeds (44,587 ha or 4.2% of total oilseed area); Sesame, Chia</td>
<td>• Tropical fruits</td>
</tr>
<tr>
<td>• Vanilal</td>
<td></td>
</tr>
</tbody>
</table>
MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

- Cocoa (19,092 ha or 32% of total cocoa area)
- Cotton (13,114 ha)
- Shea nuts
- Fresh herbs

List of active certification bodies:
- CERES
- Control Union
- Demeter International
- Ecocert
- IMO
- OCIA International
- Soil Association Certification
- UgoCert

Data in above table are based on FiBL statistics unless mentioned otherwise.

Table: Products and production in Uganda

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shea nuts (cultivated)</td>
<td>78,684</td>
<td></td>
<td>a) 1,320</td>
<td></td>
</tr>
<tr>
<td>Coffee</td>
<td>65,570</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sesame</td>
<td>39,342</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cocoa</td>
<td>19,092</td>
<td>a)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cotton</td>
<td>13,114</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td>5,245</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chia</td>
<td>5,245</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh herbs</td>
<td>5,245</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tropical fruits</td>
<td>2,072</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a) FiBL statistics

Analysis

Development of the organic sector in Uganda experienced ups and downs, with a peak of nearly 3,000 km² of organic agriculture land in 2007/08. After a year of strong decline in organic cotton area, the organic area steadily increased again to a total of 2,600 km². The number of organically certified export companies in 2009/2010 amounted to 48. This number then declined steadily while the area and the number of producers was slowly growing.

Exports of organic products were estimated at USD 7.5 million in 2003/2004, with some 30,000 producers, growing to USD 36.9 million in 2009/2010. Exports of organic products initially started with pineapples and sweet bananas, and soon after included coffee (both Arabica and Robusta), cotton, cocoa, sesame, vanilla, ginger, passion fruits, mango, jack fruit, plantain, papaya, dried/frozen/pulp fruits (pineapples, apple bananas, jack fruit, mango and papaya), bird’s eye chilies, black pepper and cardamom. Also, essential oils, honey and hibiscus tea.

Challenges reported include the high costs of packaging materials, air-freight and certification. Many exporters see the limited supply of products from smallholder farmers, and the high costs of organising farmers as a challenge, alongside with poor road infrastructure and high capital investment costs. Moreover, the government also restricted organic cotton cultivation.
Uganda’s organic market

Infographic Uganda’s organic market

Main products for interregional export markets:
Coffee, Cocoa, Sesame, Chia

Main products for domestic and regional markets:
Shea nuts, Vegetables, Fruits

Total volume of the exports:
16,616 tonnes in 2019 to EU & 891 tonnes in 2019 to USA

Total value of the exports:
50 million EUR in 2018, of which 2.9 million USD to USA in 2019

Number of operators that are exporting from Uganda:
14

Data in above table are based on FiBL statistics unless mentioned otherwise.
### Supply chains' demand

Organic products for the domestic market are sold through a number of outlets: supermarkets, restaurants, international schools and open markets. There is a big range of organic products supplied by small scale farmers and processors, including coffee, bee products, fresh fruits, vegetables, and dried fruits. Over the years, local demand for organic products has been growing steadily. For some products such as organic dried fruits, the demand far exceeds supply. Products like organic arabica coffee are increasingly consumed in local restaurants and coffee shops. Demand by consumers for 'food-safe' products can be a good driver for local organic markets to grow, and compliance systems such as PGS can be a good driver for traceability and transparency, as well as for giving farmers a better return on their hard work with fair pricing.

Exports of organic products started with pineapples and sweet bananas, soon after including coffee (both Arabica and Robusta), cotton, cocoa, sesame, vanilla, ginger, passion fruits, mango, jack fruit, plantain, papaya, dried/frozen/pulp fruits (pineapples, apple bananas, jack fruit, mango, papaya), bird’s eye chilies, black pepper, cardamom, essential oils, honey and hibiscus tea.

### Supply chains' supply

Some of the policies and activities of the government have indirectly and directly contributed to the sector's success, such as economic liberalisation policies which the government implemented in the late 1980s and early 1990s. This allowed foreign and local private enterprises to invest and partner to foster the growth of the sector. Another related policy is the NGO Act (1999) which recognised NGOs as agents of nation building and empowered them to mobilise resources from within and outside the country to achieve their nation-building objectives.

There is no legislation that regulates agroecology/organic farming. NOGAMU developed the Uganda Organic Standard (UOS), which is in line with the EU regulation. An East African Organic Product Standard (EAOPS) and mark (Klimohai) is also in place. Local certification agency Ugocert lost EU accreditation for certification. Exporters have to rely on international certification bodies such as BCS, IMO, Ceres, Ecocert, and Soil Association.

In May 2019, Pelum Uganda initiated the National Agroecology Actors Platform (NAAP), based on an FAO initiative. Together with a broad range of grassroots organisations, donors and government support, the initiative aims at scaling up agroecology. While the sector faces challenges, it is projected to grow further, given the increasing market opportunities for organic products, a major driving force for companies to engage in international organic trade.

### Market place

Uganda is still a sizeable producer for local and international markets. In recognition of the role of organic exports in the economy and to foster competition among organic stakeholders who are producing for export, the Uganda Export Promotion Board introduced ‘Best Organic Exporter and Organic Fruits and Vegetable Exports Awards’. The government also supported the drafting of a national organic policy for the country. However, there are still obstacles to realise the full potential of the country’s organic sector. This includes the government’s support for conventional agriculture through agrochemical input subsidies and the promotion of GMO foods, and the past use of DDT to control malaria, an action which led in the past to the loss of the certification status of some 15,000 organic farms.
Supporting functions

As also outlined in a PhD study of the Iowa State University, the success story of Uganda’s organic agriculture was mainly driven by the effective institutional arrangements put in place by NOGAMU in collaboration with international development organisations such as the EPOPA project (Sida), Hivos, ITC, DED, UNEP/UNCTAD, CBI, IFOAM Organics International and German BMZ (GIZ/KfW). Presently, there is no donor with specific agroecology projects, except for the GIZ Organic Knowledge Hub for East Africa, implemented by the Biovision Africa Trust in cooperation with Pelum Uganda.

Mentioned organisations have helped to (1) organise and coordinate the country’s organic sector; (2) initiate organic market development and create awareness; (3) conduct training and research; and, (4) help formulate Uganda’s national organic standard and develop organic certification and services.

The PhD study further mentions that Uganda’s government has not demonstrated adequate political will to provide institutional support to the organic sector, in fact hindering the development of the full potential of the organic sector. It has not expedited approval of the final draft copy of the country’s national organic policy (released in 2011), nor has it formulated action plans to guide development of the organic sector. Likewise, there are no government-funded research projects, organic extension services or incentives for ‘going organic.’ This has limited the resources invested in the sector to those that private actors were able to mobilise.

<table>
<thead>
<tr>
<th>Certification, ICS and PGS:</th>
<th>Advocacy:</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is no legislation that regulates agroecology/organic farming. NOGAMU developed the Uganda Organic Standard (UOS), which is in line with the EU regulation. An East African Organic Product Standard (EAOPS) and mark (Kilimohai) is also in place. In addition, there are 14 PGS groups, together representing some 9,237 producers in 2018.</td>
<td>Uganda has many local civil society organisations that (directly or indirectly) have been driving the development of the organic sector in the country. Besides NOGAMU as an umbrella organisation bringing together all stakeholders in Uganda’s organic sector, there are organisations like Pelum Uganda, Kulika Uganda, RUCID, SATNET, Caritas Uganda etc. Interventions include capacity building and training in organic farming techniques; provision of extension services and organising farmers for organic production; establishing organic farming enterprises for smallholders; production and market support; awareness raising and lobby &amp; advocacy campaigns for organic and sustainable farming friendly policies.</td>
</tr>
</tbody>
</table>

Unfortunately, NOGAMU fell into a severe institutional crisis, its future being uncertain. New organisations such as the Eco Terra Alliance Uganda (ETAU) try to fill the gap now. In May 2019, Pelum Uganda initiated the National Agroecology Actors Platform (NAAP), to scale up agroecology.

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### Trade facilitation services:
The Uganda Export Promotion Board (UEPB), in recognition of the role of organic exports in the economy, and to foster competition among organic operators producing for export, introduced the Best Organic Exporter and Organic Fruits and Vegetable Exports Awards within the President’s Awards for Exports. The UEPB also co-organised buyer tours whereby European organic buyers visited Ugandan producers.

### Research and Advice:
There is still limited public research in the organic sector. There are, however, some academic institutions such as the Uganda Martyrs University (UMU), African Centre for Agroecology and Livelihood Systems (ACALISE), Nkozi and the Makerere University (MUK); FiBL (Switzerland) does international research. UMU offers degree and certified courses in organic agriculture, while MUK offers a short training in collaboration with BOKU University (Austria).

### Rules

#### Export Standards, Private standards and Regulations:
There is no legislation that regulates agroecology/organic farming. NOGAMU developed the Uganda Organic Standard (UOS), which is in line with the EU regulation. An East African Organic Product Standard (EAOPS) and mark (Kilimohai) is also in place.

#### Trade governance:
The Ministry of Agriculture, Animal Industry and Fisheries (MAAIF) is the mandated Ministry for trade governance concerning agriculture and hence organic produce. In none of the Government policies up to 2020 much is outlined for the organic sector.

#### Promoting policies:
The UEPB, in recognition of the role of organic exports in the economy, and to foster competition among organic operators producing for export, introduced the Best Organic Exporter and Organic Fruits and Vegetable Exports Awards within the President's Awards for Exports. The UEPB also co-organised buyer tours whereby European organic buyers visited Ugandan producers.

### Conclusions

Though Uganda used to be a strong player in organic production and trade, this slowed down and reversed in recent years. Demand continues to be good, but it appears that a non-conducive trade environment (much effort, little gains), with very limited support from Government levels have quite blocked growth perspectives.

At the same time, NOGAMU fell into a severe institutional crisis, its future being uncertain. New organisations such as the Eco Terra Alliance Uganda (ETAU) and GIZ’s Organic Knowledge Hub for East Africa (implemented by the Biovision Africa Trust and Pelum Uganda) try to fill this gap. In May 2019, Pelum Uganda initiated the National Agroecology Actors Platform (NAAP), to scale up agroecology.

Uganda has about 14 PGS (participatory guarantee system) groups, which is the highest number in Africa. Yet, not much information is available on the system and groups, nor on possibly involving government support for the system. It is interesting to compare with upcoming ‘organic country’ Ethiopia, which showcases how PGS as a local appropriate form of ‘certification’ has proved to be successful for organic producers and consumers. It is now a functioning certification scheme based on trust and registration by the Organic Desk of the Ministry of Agriculture. This can help to reduce the relatively high costing of certification.

Very little is known concerning trade data or the potential of organic trade fairs in Uganda. There is a complete lack of data concerning organic trade either or not happening at trade fairs, and as far as could be established for fact, there are no functional trade platforms for the organic private sector. There is some network and association through Kilimohai as a regional Mark (with an online organic
market place), representing the East African Organic Products Standard. For accessing major international markets, however, exporters still have to rely on international certification bodies.

The Uganda Export Promotion Board (UEPB), in recognition of the role of organic exports in the economy, and to foster competition among organic operators producing for export, introduced the Best Organic Exporter and Organic Fruits and Vegetable Exports Awards within the President’s Awards for Exports. The UEPB also co-organised buyer tours whereby European organic buyers visited Ugandan producers.

If anything still needed, it will be to draw in the private sector as a driver for developing the organic sector. There is a strong rationale for inviting them to help set the stage for Uganda’s organic policy and priorities (re products and markets, diversification and value addition/processing).

**KENYA**

2.10. Kenya

Overview and development

Kenya has a longstanding tradition in organic agriculture. Growth and development of the sector in Kenya was initially much driven by NGOs and institutes such as the Kenya Institute of Organic Farming (KIOF, formed back in 1986)\(^\text{54}\). From the mid-1990s, efforts shifted from fragmented and isolated approaches to more collaborative efforts. This resulted for instance in the establishment of the Kenya Organic Farmers Association (KOFA), initiated by farmers participating in KIOF extension and training programmes. The association published organic farming standards for members based on IFOAM’s Basic Standard and the European Union Organic Regulation.

KOFA wanted to particularly develop an organic market, both locally and internationally, for their produce. However, larger companies and commercial farmers were already united for the export market in the Kenya Organic Producers Association (KOPA). Eventually, the organic agriculture stakeholders, including KOFA and KOPA, united in the Kenyan Organic Agriculture Network (KOAN) as an umbrella organisation.

There are no official policies for organic agriculture or agroecology in Kenya yet, even though there is an increasing public interest and recognition of organic agriculture. There is also very limited integration of agroecology and biodiversity in agriculture in national policy documents as a crosscutting topic. The Ministry of Agriculture has established an organic desk to lead the development of an organic policy under the department of Food Security and Early Warning Systems together with KOAN and Kenya Agricultural and Livestock Research Organisation (KALRO).

This policy process begun already in 2009, and went through extensive sector analyses, draft policy development and consultation processes. A draft policy is now ready for deliberation by the Cabinet, after which it will be discussed in Parliament. Reasons for this slow process are seen in the lack of adequate empirical data to prove that organic farming is a sustainable and scalable production system, therefore receiving scepticism about its potential for volume production and subsequent demand in markets. In contrast, the Kenya National Agricultural Insurance Program launched in 2016 was the largest government-sponsored agricultural insurance program in Africa, and was clearly unfavourable for the organic sector. This programme entailed a partnership between the government and the private sector, particularly the Syngenta Foundation with its own insurance company.

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The current approach of the Ministry is to develop a policy for organic agriculture/agroecology within a broader context of policies concerning agriculture, food security and the environment. These are for instance the National Biodiversity Action Plan (NBSAP), policies related to Environment, Forests, and Biotechnology, the National Agriculture Investment Plan, and the Agricultural Sector Transformation and Growth Strategy 2019 – 2029. As a result, however, organic agriculture has so far only been incorporated the Food Security Policy draft and the Soil Fertility Policy draft, the latter rather focusing on conservation agriculture.

A basic legal framework for seeds, crop production, environment, marketing, health and consumer protection is in place. However, they are not effectively implemented. There is also very limited integration of agroecology and biodiversity in agriculture in national policy documents as a crosscutting topic. One way to get organic agriculture recognised as a mature sector at Kenya’s policy level, is the link with agroecology. In 2019, following a ‘Scaling up Agroecology’ call by FAO, a first conference was organised by the Biovision Africa Trust (BvAT), and the Kenyan Peasant League organised a first summer school on agroecology. Interestingly, this concept links well with international developmental priorities concerning SDGs, Aichi Biodiversity Targets and Climate Change Action Plans, hence in line with policy priorities of Kenya’s Ministry of Agriculture.

Another angle is food safety; many studies have showcased that produce at ‘wet markets’ and in supermarkets contain high levels of pesticide and heavy metal residues (see for example Master Study of the Moi University in BvAT’s annual EOA report of 201855). In the same report, it is highlighted that Kirinyaga County has planned for a complete ‘organic city’. Similarly, Busia County supports the establishment of an organic fertiliser factory: private investors will build the factory, and the County provides land and funds to support the project. These cases exemplify the current conducive environment for developing organic agriculture in Kenya, and BvAT therefore continues with ‘Mainstreaming EOA into National Policies’ as a key activity in Kenya.

**Kenya’s organic production**

*Infographic Kenya’s organic production*

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified agriculture land:</td>
<td>154,488 ha (converted and under conversion)</td>
<td></td>
</tr>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>121,625 ha</td>
<td></td>
</tr>
<tr>
<td>Percentage of Agriculture:</td>
<td>0.56%</td>
<td></td>
</tr>
<tr>
<td>Organic producers:</td>
<td>37,295; one year later in 2019, 44,966 certified producers, 22 processors, and 32 exporters</td>
<td></td>
</tr>
</tbody>
</table>

List of main products (up to 20 products) that are produced:

MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

- Macadamia
- Cashew nuts
- Avocados
- Coffee
- Sesame
- Tea
- Medicinal and Aromatic Plants (tea tree, herbs)
- Coconut
- Moringa
- Apiculture
- Tropical fruits
- Fresh vegetables and melons
- Root crops

List of certification bodies operational in Kenya:
AfriCert, EnCert, Nesvax Control, Ecocert, IMOswiss, BCS Öko Garantie, Soil Association Certification, UgoCert

<table>
<thead>
<tr>
<th>Table: Products and production in Kenya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products</td>
</tr>
<tr>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Apiculture</td>
</tr>
<tr>
<td>Macadamia</td>
</tr>
<tr>
<td>Coconut</td>
</tr>
<tr>
<td>Cashew nuts</td>
</tr>
<tr>
<td>Fruit, including bananas</td>
</tr>
<tr>
<td>Avocados</td>
</tr>
<tr>
<td>Fresh vegetables and melons</td>
</tr>
<tr>
<td>Root crops</td>
</tr>
<tr>
<td>MAPs (tea tree, herbs)</td>
</tr>
<tr>
<td>Sesame</td>
</tr>
<tr>
<td>Tea</td>
</tr>
<tr>
<td>Coffee</td>
</tr>
<tr>
<td>Moringa</td>
</tr>
</tbody>
</table>

a) FiBL statistics.

Analysis
Agriculture is the backbone of Kenya’s economy, contributing 26 percent of its GDP, and 60 percent of its export earnings. Conventional horticulture and tea alone make up close to 30%. Approximately 80 percent of the population lives in rural areas, with three quarters of them being poor. About 70 percent of smallholder farmers are women. More than half of the population lives below the poverty line, and Kenya ranks among the ten most unequal countries in the world.

Four climate zones prevail in Kenya, where the Great Rift Valley in the southwest is the most productive. The eastern side of the valley is dominated by Mount Kenya, a giant extinct volcano, making the Eastern highlands among the world’s richest agricultural lands. Farms here were mainly established during the British white settler period, and are large compared to the rest of Kenya’s many subsistence farmers or nomadic pastoralists. They are predominantly export oriented with horticulture, fruits, coffee, tea and essential oils.

Larger part of the organic farms is concentrated here, connected to consumers in Nairobi and with good connectivity to international transport (airfreight Nairobi and commercial harbour in Mombasa). Export markets clearly dominate the organic trade picture, with some dynamic growth because of increased demand. The local production sales pitch is mostly based on self-claims (‘default organic’ or ‘natural’) or on PGS. Local markets are increasing but need more concerted effort to reach scale beyond traditionally stronger export products and pioneer initiatives.

Kenya’s organic market

Infographic Kenya’s organic market

<table>
<thead>
<tr>
<th>Main products for interregional export markets:</th>
<th>Macadamia, coffee, tea, coconut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main products for domestic and regional markets:</td>
<td>Fruits, vegetables, moringa</td>
</tr>
<tr>
<td>Total volume of the exports:</td>
<td>4,846 tonnes in 2019 to EU &amp; 66 tonnes in 2019 to USA</td>
</tr>
<tr>
<td>Total value of the exports:</td>
<td>24 million EUR in 2018, of which 423 thousand USD to USA in 2019</td>
</tr>
<tr>
<td>Number of specialised/overall outlets in the domestic market:</td>
<td>n/a</td>
</tr>
<tr>
<td>Number of operators that are exporting from Kenya:</td>
<td>32</td>
</tr>
<tr>
<td>Number of operators that are importing into Kenya:</td>
<td>15</td>
</tr>
</tbody>
</table>
Supply chains' demand
Organic produce is all but visible, or to a very marginal extent. In informal local markets, it is often not possible to distinguish between conventional and organic. If said to be organic, there is little proof of the extent of being organic; sometimes referred to ‘organic by default’ or ‘naturally produced’. In some way, through organic certification or PGS, standards need to be adhered to and controllable (traceability and transparency), otherwise discouraging true organic producers.

In this sense, the current demand by consumers for ‘food-safe’ products can be a good driver for local organic markets to grow, as well as for giving farmers a better return on their hard work with fair pricing. Even if it is difficult to find statistics, most respondents mention that there is a growing demand for organic products from Kenya. In Kenyan cities, consumers are increasingly worried about food safety issues (pesticide and heavy metal residues, microbiological contamination), and are therefore looking for better foods. Yet, the Kenyan retail sector is still heavily marked by strong competition and boom and bust scenario’s for supermarket retail chains. Because of strong price competition with low margins, chances for organic suppliers are still not good, though there are signs that some specialist retailers (specialist outlets, restaurants and online delivery service) are looking for opportunities to cater for consumers in cities who look for safe and responsible foods.

Supply chains' supply
Larger part of the organic farms is concentrated in central Kenya, well-connected to consumers in Nairobi and with good connectivity to international transport (airfreight Nairobi and commercial harbour in Mombasa). Organic production is organised around a small number of large farms, outgrowers and input suppliers. Fruits, nuts, coffee and essential oils and tea are the six major organic product categories Kenya produces and exports. With respect to local markets, the above-mentioned trend of specialist retailers looking for opportunities to cater for conscious consumers, offers opportunities for organic suppliers.

Market place
Kenya has a similar size as France, with a population of about 50 million. This in itself should constitute a large market for organic products, but over the years organic production has been mostly geared to export markets. This is also the result of very low visibility of organic smallholder farmer’s efforts in producing for local markets; many of the pop-up ‘wet markets’ are irregular and informal; there are also some semi-permanent outlets in shopping malls.

According to Kundermann and Arbenz (2020), the local organic market is mainly placed around the capital city, where a major part of the consumers are foreigners and higher middle-class citizens. In Nairobi, more than 10 outlets are selling organic products, and they are situated in the wealthy areas. The organic products sold in the supermarkets are typically coffee, tea, honey, sunflower oil, flour, macadamia nuts, and various health products. The greengrocers offer on top a variety of vegetables and fruits. There are also organic restaurants and online delivery services in Nairobi, and in Mombasa tourism is a main driver for organic food demand.

Supporting functions

According to BvAT’s 2018 annual report, Kenya’s EOA national platform has been fully operational, the National Steering Committee (NSC) keenly following the progress of EOA implementation at the country level. The NSC held 2 meetings in 2018, during which partner workplans, progress reports and exchanges were shared. The NSC has kept track of project implementation and provides advice and support, in particular with respect to creating synergies between implementing partners.

The Kenya Organic Agriculture Network (KOAN) is a national membership organisation for organic agriculture in Kenya, formed to coordinate, facilitate and provide leadership and professional services to all members and stakeholders in the organic sector in Kenya. Its members are farmers, traders, exporters, service providers (extension officers, certification bodies) and research institutions.

As for international support, Busia County partnered with local organic NGOs to train its extension officers on organic agriculture through a donor-funded project; some 18 extension workers attended the one-week training. The County’s agriculture office allocated the time for extension staff to participate in the training.

GIZ is active in mainstreaming biodiversity in agricultural landscapes, as a working package in its Biodiversity project. It also does policy dialogue and participation in fora as approaches to move from awareness to development of guiding documents at national and county level. Together with e.g. Bioversity International, GIZ supports the Busia Biodiversity Policy and influences the sector and extension policies on sustainable agriculture. In this context, KfW provides advisory services, financial services and support for agriculture research.

SDC supports the ecological organic agriculture and Biovision is active in organic and agroecological knowledge management and livelihood development. There is also Danish support for agroecology and organic research and institution building.
**Certification, ICS and PGS:** There are various international certification bodies (CB) involved in Kenya: Soil Association (UK), Ceres (USA), Ecocert/IMO (France) and Bioagricert (Bio Suisse standard in Switzerland).

Most of the CB use locally trained inspectors and certify in their home offices overseas. A national certification body Encert was established in 2005 to certify for the national markets. PGS is not widespread but existent in Kenya. In May 2007, the East African Organic Products Standard (EAOPS) was launched after a consultative process, which started in 2005 by harmonising organic standards that existed in the East African region. Together with the EAOPS, the ‘Kilimohai’ brand was developed to help promote and boost regional trade.

Building capacity of ICS on PGS enabling increased compliance in organic standards. The PGS may even be managed by the private sector, rather than by the government, but it can still be somewhat endorsed/recognised by the government as THE common system for the country/region. An example of this is the East African Community (Kenya, Uganda, Tanzania, Burundi and Rwanda) in which the East African Organic Product Standard is approved by the East African Community (an intergovernmental body) and is linked to the regional East African Organic Mark, but the mark is managed by a consortium of the national organic umbrella organisations. This consortium also decides on the East African Organic Guarantee System, i.e. the Agroecology Rapid Assessment criteria for granting the use of the logo. Governments can adopt similar models whereby they delegate the management of the common organic logo to the private sector.

**Trade facilitation services:** The Food Kenya Trade show 2019 took place from 20-22 September at the Sarit Expo Centre, Nairobi. Food Kenya 2019 is the global platform that aims to connect International Food & Hospitality Companies to showcase their products to the developing market of Kenya and other East & Central African countries. It will provide wider opportunities for international and Kenyan companies to stand out with their distinctive products & explore the current requirements and opportunities in the market.

**Advocacy, Research and Advise:** Kenya has an active civil society that is very outspoken. There are various organic and agroecology research and development institutions (CIAT, Icipe, ICRAF, KIPPRA; Kenya Agricultural and Livestock Research Organisation (KALRO), Biovision Africa Trust (BvAT), Pelum Kenya, SACDEP (promoting sustainable and low input agriculture), the Kenya Institute of Organic Farming (KIOF), the Organic Consumer Alliance, Consumer Watch (by KOAN), and Organic Food Kenya. The Kenya Institute of Organic Farming (KIOF) is a non-governmental and not-for-profit organisation working throughout Kenya and the Eastern Africa region in particular. Besides commercial purposes, it also exists for the public at large by promoting rural development and education in organic agriculture and related marketing services.

**Rules**

**Export Standards, Private standards and Regulations:** Kenya’s Agriculture & Food Authority is responsible for all production and trade of agriculture products. The Authority is the successor of former regulatory institutions in the sector that were merged into Directorates under the Authority, including Coffee Board of Kenya, Kenya Sugar Board, Tea Board of Kenya, Coconut Development Authority, Cotton Development Authority, Sisal Board of Kenya, Pyrethrum Board of Kenya, Horticultural Crops Development Authority.

**Promoting policies:** Besides KOAN, KIOF and BvAT, there are also media products such as specialised radio emissions and the magazine “The organic farmer” issued by BvAT. The Green Belt movement of Nobel prize awardee Wangari Maathai closely liaises with the agroecological principles and movement in Kenya, and so are AFSA (Africa Food Sovereignty Alliance) and international networks such as Via Campesina with its member the Kenyan Peasant League. A new alliance of networks in Agroecology in Kenya ANAK is being formed but does not yet have an Internet presence. iCow is a social enterprise offering a smartphone app facilitating services to farmers and consumers.

**Trade governance:** As mentioned above, Kenya’s Agriculture & Food Authority (AFA) is responsible for all production and trade of agriculture products.

**Conclusions**

While Kenya used to be quite strong and growing in organic production and trade, this apparently slowed down or reversed in recent years. Demand continues to be good, but it appears that a non-conducive trade environment and the very limited support from Government have blocked growth perspectives. In this sense, it is interesting to compare to Ethiopia, to showcase how a participatory guarantee system (PGS) serving as a local appropriate form of ‘certification’, has proved to be successful for organic producers and consumers by the organic desk of the Ministry of Agriculture. This can help to reduce the relatively high costing of certification.

In its annual report on Ecological Organic Agriculture (EOA), the Biovision Africa Trust (BvAT) points to the institutional challenges (insufficient recognitions at national policy levels; struggles within national organic movements) and limited enabling environment that hamper formal development of the organic sector. This is now being addressed by the Initiative on Ecological Organic Agriculture (EOA-I), running since 2014 by the African Union Commission, Biovision Africa Trust (BvAT), PELUM Kenya and other partners. They have designed a roadmap, concept note and African Organic Action Plan to mainstream Ecological Organic Agriculture into National agricultural production systems by 2025. Interestingly, this concept links well with international developmental priorities concerning SDGs, Aichi Biodiversity Targets and Climate Change Action Plans, hence in line with policy priorities of Kenya’s Ministry of Agriculture.

Another angle is food safety; many studies have showcased that produce at ‘wet markets’ and in supermarkets contain high levels of pesticide and heavy metal residues. Several cases were highlighted to exemplify the current conducive environment for developing organic agriculture in Kenya, hence BvAT continuing with the ‘Mainstreaming EOA into National Policies’ as a key activity.

Next to EOA-I, GIZ supports a network of regional hubs of the Knowledge Centre for Organic Agriculture in Africa. These can be instrumental to address the shortfall of available data in the organic sector in East Africa. Unlocking the potential of organic agriculture requires in-depth understanding of ecological interrelationships and knowledge of practices in agricultural production, processing and marketing.

More striking however, from the above analyses, is the realisation of a complete absence of the private sector in any of the policies and strategies that have been designed and implemented over the years. Just like the striking farmer/aggregator under-representation in many of the dialogues, the private sector is key to unlocking the potential of the organic sector, helped by consumer pressure and demand for safe and sound foods. The Retail Trade Association of Kenya (RETRAK), for instance, is the voice of the retail industry, its main objective being to put across retail trade concerns (e.g. with respect to safe and healthy food) to government, parliament and other bodies.

Despite the fact that there are several trade fairs in Kenya, there is a complete lack of data concerning trade either or not happening there. In addition, and as far as could be established for
MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

fact, there are no functional trade platforms for the organic private sector, except for some networks and associations (incl. the Kilimohai organic market place). If anything still needed, it will be to draw in the private sector as a driver for developing the organic sector. There is a strong rationale for inviting them to help set the stage for Kenya’s organic policy and priorities (re products and markets, diversification and value addition/processing).

BURKINA FASO

2.11. Burkina Faso

Overview and development

The economy of Burkina Faso is to a large extent based on agriculture of smallholder farmers (30% of GDP for 60% of people). It has a very long history of Organic Agriculture. In the 1980s president Sankara had a vision of food self-sufficiency through agroecology and invited the Franco-Algerian pioneer Pierre Rabhi to reform agriculture. In 1988, the first (and only so far) Organic World Congress in Africa took place in Burkina Faso.

However, present agriculture policies do not refer to organic anymore and the government only has a small focal point for organic within the plant protection directorate. Recently, a few extension agents supported by EOA-I (Swiss support) started to be operational. Other organic cooperation projects come from ECOWAS (French support) and IFOAM Organics International (Dutch support). The government subsidises agricultural inputs and does not exclude organic inputs such as organic fertilisers or effective micro-organism.

CNABio is the umbrella organisation. Ecocert is the leading certification body with an own office in the country. CNABio has developed a private standard, which is mostly used with PGS and is not mandatory for the domestic market. There are about 30 groups operating with a PGS, of which a few of them are also building an ICS for third party certification and the possibility to export. However, most of the organic sector is export oriented, which has grown from 7,000 ha in 2007 to now 60,000 ha and 25,000 producers producing mango, cashew nuts, shea nuts, moringa, sesame, soy, hibiscus, sorghum, tiger nut, cotton and MAPs. The same products are also traded domestically, but priority there lies on (fresh) vegetables, cereals, pulses and fruits.

The sector has a vast number (> 70) of initiatives and NGOs that are working with organic and agroecology58, having a strong political expression and lively debates about agricultural policies. Burkina Faso was one of the first African countries to introduce GMO in cotton and through that it saw a sharp decline in organic cotton after 2010. In 2016, based on the negative economic and environmental impacts, Burkina started to ban again the GMO cotton.

The private sector closely connects organic and fair trade (called “marché biologique équitable”). Recently, there is a lot of attention for the local market with adapted approaches in the land locked low-income country with poor institutions and infrastructure and where analphabetsm is common among producers. Challenges of the market are seen in the non-availability of information and data, in production lagging behind domestic and exports demands and in expensive certification. The movement pursues a strategy of decentralisation, of upscaling PGS and of introduction of

58 http://www.burkinadoc.milecole.org/agriculture-durable/article-agroecologie-au-burkina-faso/
certification for distribution. Since 2018 local trade fares are organised within the network several times a year.

**Burkina Faso's organic production**

Infographic Burkina Faso's organic production

Organic certified agriculture land:

56,663 ha (converted and under conversion)

Organic certified other areas (wild collection):

231,765 ha

Percentage of organic agriculture (of agriculture land):

0.47%

Organic producers:

26,627

List of active certification bodies:

Certisys, Ecocert Burkina Faso (branch office), Lacon, Suolo e Salute

**Table: Products and production in 2018 in Burkina Faso**

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cashew nuts</td>
<td>a) 17,960</td>
<td>a) 7,406</td>
<td>d) 62 million</td>
<td>d) Assumption: EUR 8.40 /kg export price</td>
</tr>
<tr>
<td>Mango</td>
<td>a) 10,213</td>
<td>a) 49,346</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sesame</td>
<td>a) 8,589</td>
<td>a) 3,170</td>
<td>d) 3.5 million</td>
<td>d) Assumption: EUR 1.10 /kg export price</td>
</tr>
<tr>
<td>Soybeans</td>
<td>a) 8,112</td>
<td>a) 15,191</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cotton</td>
<td>a) 4,591</td>
<td>b) 538</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAP cultivated</td>
<td>a) 1,139</td>
<td>a) 150</td>
<td>n/a.</td>
<td>Incl. Ginger</td>
</tr>
<tr>
<td>Hibiscus</td>
<td>a) 374</td>
<td>a) 183</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Peanuts</td>
<td>a) 29</td>
<td>a) 19,501</td>
<td>d) 28 million</td>
<td>d) Area and volume do not match; Assumption: EUR 1.50 /kg export price</td>
</tr>
<tr>
<td>Dried fruit</td>
<td>n/a.</td>
<td>a) 1,225</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shea nuts (wild)</td>
<td>a) 198,257</td>
<td>a) 7,189 - b) 14,869</td>
<td>d) 4 million</td>
<td>d) Assumptions: 30% shea butter yield and EUR 2 /kg export price shea butter</td>
</tr>
<tr>
<td>Fruits (wild)</td>
<td>a) 15,000</td>
<td>a) 13</td>
<td>n/a.</td>
<td></td>
</tr>
</tbody>
</table>
MAP wild collection | a) 1,500 | a) 2 | n/a.

Sources: a) FiBL statistics b) other statistics c) resource person estimates d) own estimates.

While organic was initiated by pioneers and highest-level policy statements, it first evolved on export markets, with a very strong development of production areas in recent years (eightfold since 2007 and tripled since 2014). Organic cotton for export seemed to be a success story, but the introduction of GMO literally destroyed production for a while and is now recovering however still on a low level. Main export value chains are now mangoes, nuts (including shea butter), MAP and still cotton. Wild collection also developed strongly and quadrupled since 2007. There are about 100 certified processors.

Since 2013, the strategy changed towards more focus on the domestic market and in building a national system based on PGS. Albeit still small with 30 groups and nearly 500 producers on 80 ha, the production system became more robust, more female (80% of PGS producers are women, 15 men and 5% legal entities), more diverse with fresh products for daily use and with an emerging processing (30 working places so far) for local needs. Fresh vegetables for home consumption and restaurants are in the centre of attention.

In January 2020 a ginnery for organic cotton was opened in Koidougou.

**Burkina Faso's organic market**

**Infographic Burkina Faso's organic market**

- **Main products for interregional export markets:**
  - Cashew nuts, peanuts, mango, soybeans, sesame, shea

- **Main products for domestic and regional markets:**
  - n/a

- **Total volume of the exports:**
  - 12,456 tonnes to EU in 2018

- **Total value of the exports:**
  - n/a

- **Number of specialised/overall outlets in the domestic market:**
  - 30

- **Number of operators that are exporting from Burkina Faso:**
  - 71

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Supply chains' demand
High demand for exports to Europe and partly to USA. 71 exporters. Also, good demand on local market for PGS certified products. Despite efforts in the past years, organic is not yet well known with consumers and trust needs to be further built for the national organic mark. Processing slowly upcoming.

Supply chains' supply
There has been a very strong development in the past years in agriculture land and wild collection. Constraints are seen in input supply (e.g. seeds), certification management and costs, poor support services (e.g. incompetent advisors), farmers' resistance to change and competition from seemingly easy and agrobusiness promoted conventional system. Eight input supply operators.

Market place
There are about 30 places mostly around Ouagadougou where organic (PGS) products are available. The network is being expanded. Various local organic trade fairs took place in 2018 and 2019. The international market is based on trade with importers mostly from Europe that are looking for raw products and usually take the lead on organising the exports.
### Supporting functions

**Organic Umbrella:** CNABio is the national umbrella organisation for agroecology and organic agriculture. It was founded in 2011 and has 65 (38 organisational and 27 individual) members.

The fair-trade sector has its own umbrella, the "Plateform National de Commerce Equitable" (PNCE) which closely collaborates with CNABio.

**Certification, ICS and PGS:** Ecocert is the main CB with an own chapter in Burkina Faso. Other international CBs are Certisy, CERES and LACON. CNABio also owns certification committee, CCC, supporting PGS.

**Promotion and PR:** Little information and PR services for consumers available. However, there is progress in recent years through dynamic PGS development and the growing outlets for organic produce.

**Research and Advise:** For a long time, there was no research on organic, but now various training and research institutions became active: ISSTA, AB-NORM, INERA/CNRST (CIRAD France supported), Nazi Boni University/IDR, Centre Agricole Polyvalent (CAP Matourkou). FiBL has also conducted research on organic cotton, on other crops and small farmer production systems as well as on agroecological resilience in West Africa. Stakeholder also emphasise the importance of practical on-site research of operators. EOA-I supported government extension agents. A survey revealed that 97% of actors use the Internet for information research with CNABio being the single most mentioned source (34%) of information.

**Trade facilitation services:** There are eight consultancy offices for trade development services. Occasional support e.g. for participation at BIOFACH from governmental agency APEX-Burkina (Agence pour la promotion des exportations du Burkina Faso). Occasional support e.g. for participation at BIOFACH from governmental agency APEX-Burkina.

**Information service:** No particular popular organic information services.

**Advocacy:** Big and active civil society for organic, agroecology and fair trade.

**Financing services:** Very difficult access to affordable investment capital

### Rules

**Export Standards:** EU, NOP, and occasionally JAS, Brazilian and Korean standards. Private standards: Bio Suisse and various fair trade standards such as Fairtrade International, WFTO, Fair for Life and Naturland Fair

**Promoting policies:** No systematic organic promotion policies of the government, but input subsidies also extended to organic inputs. Opening to GMO seed in 2008 led to a setback in organic production. GMO cotton is again banned since 2018.

**Domestic standards and regulations:** CNABio has a national standard and a mark, which is usually PGS verified. No regulations.

**International cooperation:** Support is coming from ECOWAS/AFD (France), IFOAM (Dutch support), and EOA-I (Swiss support).
Conclusions
Burkina Faso has initially developed as classic organic export country that translated very little into a thriving local sector with developing institutions. Only in 2011, with the will of local actors that did not want to become dependent of international actors - with a focus on agroecology and food sovereignty - there were actions to build a sustainable sector with necessary institutions and market functions. The local movement innovatively started slowly a strategy adapted to local conditions to build a sound and healthy sector that can deliver on environmental and social benefits and that contributes to inclusive human development creating empowerment opportunities e.g. for smallholders and women.

Analysing the positive developments, it is obvious that the opportunities of the private sector’s international trade definitely contributed to the required momentum and interest from stakeholders. At the same time, it needed the lead of the civil society, supported by international cooperation to develop more sustainable and balanced sector structures.

Another conclusion is that developing local markets and institutions is not in a conflict of interest with the export market. Even though both markets developed in relative isolation, both scaled impressively in parallel and with synergies.

While in terms of size, the domestic trade lags behind the international trade, it has many positive externalities. The domestic sector is decentralised, has many participants/beneficiaries and through that it is less dependent on few decision makers and beneficiaries that provide a risk to development. Therefore, organic actors in West Africa have an increased interest to learn from the development model of Burkina Faso, which has found a promising strategy to further expand organic production and consumption.

Togo

2.12. Togo

Overview and development
Togo has the highest number of organic producers among the West African countries (and the 6th in Africa). With 1%, it is 8th in terms of the share of organic agriculture land in Africa and it ranks 14th for imports into the EU, placing it 2nd in Africa and 1st in Sub-Saharan Africa. The export of organic products is very dynamic and has increased impressively. In the decade after 2000, Togo had around 2 - 3,000 ha certified organic agriculture land, while from 2014 to 2018 it increased sharply from 15,000 ha to more than 40,000 ha or 44,000 tonnes of exports to the EU. Of those 40,000 ha only 15,000 ha are reported to be fully converted, which means that a lot of development is happening now. The most important organic certified commodities from Togo include cocoa, soy
beans, fruits (pineapple, mango) and smaller quantities of cashew, coffee, ginger, spices, vegetables and peanuts.

While overseas exports are thriving, there has been very little institutional development and a relevant domestic trade and consumption still has to emerge. A stakeholder analysis of an IFOAM Workshop within the OM4D project concluded that there are many diverse actors, but that they are poorly cooperating and are poorly organised. The organic umbrella Organisation ANA-Bio Togo was founded in October 2019 only, but it lists already almost 100 members. Various associations (AMAP Togo, Experta, Zanito, Tropic Teckno) market local (non-certified) organic products and are considered progressing PGS initiatives.

The government has so far been little active, realising recently the opportunities and the growing importance. It drafted in 2019 a 5-page conceptual note on a national transition of the agricultural sector towards organic farming and suggests a quasi-total conversion to organic until 2030 including crops, livestock and fisheries. The ministry of agriculture together with important stakeholders such as ANA-Bio Togo and with GIZ drafts presently a national organic action plan, which is a strategic plan of the whole sector.

There are no local standards and certification. Exporters rely on international CBs. There is currently no recognised PGS operational in Togo and some stakeholders doubt that apart from expatriates anybody would be ready to pay premium prices and/or trust any kind of local conformity assessment processes. However, ANA-Bio is confident that in 2021 this situation will change and that there will be operating and successful PGS.

A number of NGOs, including CTOP, the Togolese farmer association, Bio Dream, Mission des Volonataire Contre la Pauvreté (MVCP), RAFIA, World Wide Opportunities on Organic Farms (WWOOF) etc. are promoting organic in Togo. Civil society has played an important part in lobbying the government on the need to support the emergence of organic trade. International organisations such as IFOAM Organics International, ECOWAS, Friends of the Earth, Groundswell and TERO support organic development and conversion.

**Togo's organic production**

**Infographic Togo's organic production**

- Organic certified agriculture land: 41,323 ha (converted and under conversion)
- Organic certified other areas (wild collection): 0 ha
- Percentage of Agriculture: 1.08%
- Organic producers: 38,414

List of active certification bodies in Togo:

Ecocert, CERTISYS, CERES
### Table: Products and production in Togo

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocoa</td>
<td>a) 1,312</td>
<td>a) 2,632</td>
<td>d) 7 million</td>
<td>d) Assumption: EUR 2.6/kg export price</td>
</tr>
<tr>
<td>Soybeans</td>
<td>a) 36,448</td>
<td>a) 59,650</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pineapple</td>
<td>a) 412</td>
<td>a) 14,044</td>
<td>d) 6 million</td>
<td>d) Assumptions: All sold fresh and EUR 0.7/piece export price at 1.75 kg/piece</td>
</tr>
<tr>
<td>Cashew nuts</td>
<td>904</td>
<td>d) 373</td>
<td>d) 3 million</td>
<td>d) Assumption: EUR 8.4/kg export price</td>
</tr>
<tr>
<td>Mango</td>
<td>a) 84</td>
<td>a) 542</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sources: a) FIBL, 2020; CBI, 2020  b) other statistics  c) resource person estimates  d) own estimates

Organic pineapple for fresh, juice and dried is a major organic production industry in Togo for which producers can expect a price premium of nearly 40%. Between 1,000 and 2,000 farmers in Togo produce about 20,000 tonnes of organic pineapple which is two third of its overall pineapple production. Farmers can expect between 30 and 55 t/ha and about 12 – 22 t/farmer depending on region of production. In contrast to conventional farmers that often produce individually, organic farmers are organised in cooperatives and certify with ICS.

**Togo's organic market**

**Infographic Togo's organic market**

Main products for interregional export markets:

Pineapple, cocoa, mango, cashew nuts

Main products for domestic and regional markets:

n/a

Total volume of the exports:

44,684 tonnes to EU in 2019 (100% up from 2018)

113 tonnes to USA in 2019

Total value of the exports:

n/a

Number of operators that are exporting from Togo:

31
Supply chains' demand
Since 2019, there is a new organic pineapple juice processing plant (Label d’or) with the capacity of 8t/day. Other important rather big processors and traders demanding organic industrial raw products are Pronatura West Africa, Tropic Bio, Espace Kadoma and Soycaïn. Small- and medium scale national organic inputs and processing factories are missing. Totally, 12 processors and 9 exporters in the country.

Out of the production, 9,000 t are marketed as fresh organic pineapples. 200 t of juice and 450 t (20% of production) dried are exported to Europe (95%) and to neighbouring countries (2%). The rest is marketed in Togo (3%).

Supply chains' supply
Supply comes from farmers that are organised in groups (ICS) lead by the processing or exporting companies. There are efforts now to organise farmers in PGS for diversified products (e.g. vegetables) for the local markets.

Market place
Export market established a couple of years ago with strong growth in the hand a few operators. Local market in very infant stage with new passionate stakeholders but with little stability and experience.

Supporting functions

**Organic Umbrella: ANA-Bio**, founded in 2019 with about 100 members. ANA-Bio takes Burkina Faso as learning example.

**Promotion and PR**: No activities to inform the public about organic.
Certification, ICS and PGS: Ecocert (Burkina/France), CERTISYS (Belgium) and LACON (Germany). Setting up of first PGS is in discussion.

Advocacy: ANA-Bio has a consolidated advocacy to the government in its new mission. A number of NGOs made a case for agroecology/organic. There is a good number of organisations that showed interest in developing a sector and a movement (rather than a trade only). E.g. development agencies, consumer associations, rural service providers, farmer associations etc.

Research and Advise: Various institutions include research and training activities of organic agriculture. E.g. the Centre de Formation Agricole et de Production Écologique, CEFAPE Togo, the International Centre for Agro-pastoral Development (CIDAP), the Togolese agroecological center or the Professionals of Organic Agriculture and Environment in Togo" (PABE-Togo). The government concept note on organic conversion indicates a total of 74 agroecological centers in the country.

EOA sector development projects: Organic Markets for Trade (OM4D), implemented by IFOAM Organics International and AgroEco (Dutch) and "Transitions agro-écologiques et résilience des territoires ruraux" implemented by ECOWAS (French). Friends of the Earth, Groundswell and TERO are also active with organic farming projects.

Rules

Export Standards: EU Regulation

Promoting policies: So far, no promotion, however (unapproved) national conversion concept note and a national organic action plan is in preparation.

Private standards and Regulations: only export standards from Europe.

Trade governance: COLEACP facilitates certain value chains (e.g. Soy or pineapples. Conventional and organic).

Conclusions

Togo is an emerging organic marketplace with a fast and impressive development in recent years. However, the role of Togo has been purely a producer of raw products for value chains driven by a hungry European market for tropical products either for consumers (e.g. pineapples), for the processing industry (Cocoa) or feed for livestock (Soy). Togo has however not developed its visions (e.g. transmitted by inspiring and charismatic pioneers), its narratives (explaining the reason why), its institutions (for leadership and services) and its agenda (reform objectives).

Workshops revealed that stakeholders know what is needed, e.g. vocational training of young farmers, solutions for organic system building, varieties/seeds development, collaboration in the movement, research and consumer information etc. However, basic sector institutional development should not avoid keeping competitiveness of Togolese products in the export markets and private sector needs are also a concern. Stakeholder report for instance about poor port infrastructure in Lomé and the need to make it functional so that sea freight can be used instead of air freight only. They also complain about expensive international certification or miss facilitated transparent and multi actor buyer markets.

The organic sector is presently export driven and dynamic through the initiative of few people, but there is consensus and motivation to build a local market and sustainable sector structures. Stakeholders believe that there is local demand if structures are built and supply is organised. The
PGS model as practiced in Burkina Faso has inspired stakeholders and the export organic actors are committed to invest also in the local market based on PGS.

The sector needs now initial facilitation and inspiration to find a common development path benefitting people and ecosystems in Togo rather than only satisfying a demand elsewhere. This happens mostly through IFOAM Organics International/Agroeco and through the PATAE project of ECOWAS. Africa’s organic institutions such as WAfrONet, AfrONet and EOA-I are not yet present in Togo and are challenged to support and include the arising movement, which is driven by export opportunities. Promising steps like the building of a national umbrella organisation, a national organic action plan and information campaigns to the population and the government are starting now. The germinating seed has support, but it takes perseverance and stamina to build a comprehensive sector. This sector should not only be a station for shipping (organic) raw materials to Europe but a partner for the local economy that smartly uses the opportunities for sustainable economic, social, environmental, cultural and accountable development. Other countries, particularly in the French speaking Africa, can inspire Togo, e.g. Burkina Faso with its PGS local market development strategies, Tunisia with its sector governance and promotion or Senegal with its long-standing movement structures and narratives.

The dynamic start of the ANA-Bio, the motivation and good mood of stakeholders, their analyses and strategic paths, the international facilitation support and the good learning models in neighbouring also francophone countries are all important factors to be very optimistic that Togo will show very positive developments towards a leading organic country in West Africa and in the continent.

2.13. Morocco

Overview and development

Since its independence in 1956, the agriculture sector in Morocco has been a priority sector. Organic Agriculture started 1986 with citrus exports to the EU. They soon extended to other vegetables and fruits targeting EU off-season demand and to medicinal and aromatic plants (MAP). The certified organic area in Morocco grew rapidly initially but has thereafter remained relatively constant with a new dynamic particularly in export volumes in the last few years (approx. 500 ha in 1997 to 8,300 ha in 2003 and 9,300 ha in 2019 with 270,000 ha wild collection. The production volume reaches now 100,000 tonnes, of which 17,000 t (80% growth since 2016, mostly going back to wild collection) is exported. With 302 certified producers (ICS), 76 processors, 15 exporters and 1 PGS (30 operators), the organic sector in Morocco is still relatively small.\(^{60}\)

The main national organic products are the Argan tree (72%) and aromatic/medical herbs (22%), carob (16%), olive (13%) and fruit & vegetable crops (12%). The main countries importing Moroccan

organic products are (in that order) France, Germany, Switzerland, Netherlands, Turkey, Spain, UK and USA.

The government has paid attention to the organic sector since 2004, when it established a central office for organic agriculture. In 2010, it set up AMABIO, the then organic umbrella organisation, which in 2016 was reorganised to FIMABIO as exclusive interprofessional organisation. The government has ambitious goals triggering EUR 100 million investments, achieving 40,000 ha OA land, a production of 400,000 t, exports of 60,000 t creating 45,000 jobs and EUR 70 million annual foreign currency income. However, reality is only about 25% of it. In 2012, an organic law passed to regulate and promote the sector. It entered into force in 2018, the second national organic regulation in Africa, after Tunisia.

Two certification bodies are accredited to certify according to Moroccan regulation, a precondition for the local market. Morocco doesn’t have equivalence status with any other country. Farmers that are exporting must therefore use a foreign standard and CB. PGS are not foreseen in the regulation, but RIAM has set up at least one functioning example in the country.

There is an emerging domestic market with considerable investments into organic outlets with local and international products, the latter mainly from France. Big retailers and wholesalers discovered potentials in organic produces and start to supply. There are imports but also considerable production, marketing and even exports of organic inputs such as fertilisers or seeds.

In 2019 for the first time, there was a specialised trade fair for organic products, the BioExpo Maroc for domestic and international markets. The Moroccan organic sector is also supported by international cooperation from France, Germany and Switzerland. These include value chain developments from Swisscontact, the organic component of the DIAF project (technical dialog in agriculture and forestry) of the German Ministry of Agriculture, the GIZ North Africa Organic Knowledge Hub implemented by Sekem in partnership with FIMABIO, as well as the institution building projects of AfrONet and of Naturland, Germany. Not least through those projects, the Moroccan organic sector is one of the best researched in Africa.

Despite the fact that earlier plans were too optimistic, private and government stakeholders believe in growth and design new strategies and investment plans in the frame of the Generation Green 2020 - 2030. Those plans consider the opportunities of the well-organised sector, the arising domestic opportunities to an increasingly health concerned middle class population, the comparative advantages of production (climate, seasonality, special products) and the vicinity of the hungry European markets, where Morocco has a good reputation. Challenges include short seasonal windows for vegetables, big competition with South Spain, lack of research and advise for producers.

Morocco's organic production

<table>
<thead>
<tr>
<th>Infographic Morocco's organic production</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified agriculture land:</td>
</tr>
<tr>
<td>9,917 ha (converted and under conversion)</td>
</tr>
<tr>
<td>Organic certified other areas (wild collection):</td>
</tr>
<tr>
<td>268,129 ha</td>
</tr>
<tr>
<td>Percentage of organic agriculture (on agriculture land):</td>
</tr>
<tr>
<td>0.03</td>
</tr>
</tbody>
</table>
Organic producers:

277

List of active certification bodies:

CCPB (branch office in Morocco), Control Union Maroc (branch office in Morocco), Ecocert Maroc (branch office in Morocco), CERES, Demeter, ProCert Safety

Table: Products and production in Morocco

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temperate fruit</td>
<td>a) 3,759</td>
<td>a) 21,408</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Fresh vegetables and melons</td>
<td>a) 2,160</td>
<td>a) 53,850</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Olives</td>
<td>a) 1,284</td>
<td>a) 5,840</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Citrus fruit</td>
<td>a) 1,274</td>
<td>a) 19,900</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Rose</td>
<td>a) 246</td>
<td>a) 379</td>
<td>n/a.</td>
<td>Raw material for rose oil</td>
</tr>
<tr>
<td>Argan (wild)</td>
<td>a) 31,692</td>
<td>a) 15,846</td>
<td>n/a.</td>
<td>Raw material for rose oil</td>
</tr>
<tr>
<td>Rosemary</td>
<td>a) 56,000</td>
<td>n/a.</td>
<td>n/a.</td>
<td>470 tonnes of oil</td>
</tr>
<tr>
<td>Cactus</td>
<td>a) 40,700</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Opuntia (wild)</td>
<td>a) 4,367</td>
<td>a) 22,667</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Carob (wild)</td>
<td>a) 1,820</td>
<td>a) 18,201</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Caper</td>
<td>a) 250</td>
<td>a) 501</td>
<td>n/a.</td>
<td></td>
</tr>
</tbody>
</table>

Sources: a) FiBL, 2020; UNCTAD, 2018

The about 300 producing operators are found all over the country with 35% being in Souss-Massa and 23% in Marrakech-Safi and 14% in Casablanca-Settat. The biggest area is found in Rabat-Sale-Kenitra with 35% of the 9,000 ha land, while Tanger-Tetouan-Al Houceima occupies 29%, Draa-Tafilalet 18% and FES-Meknes 15% of the organic agriculture land. Wild collection (about two third for MAPs and one third for Argan trees) is mostly found in the East and in the region of Timahdit. About 1,000 ha are in conversion including for vegetables, olives, citrus and other fruits and dates.61

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Morocco's organic market

**Infographic Morocco's organic market**

Main products for interregional export markets:
Temperate fruits, citrus fruits (incl. orange juice), vegetables

Main products for domestic and regional markets:
Complete range including imported packed products

Total volume of the exports:
589 tonnes to USA in 2019
20,744 tonnes to EU in 2019

Total value of the exports:
2.9 million USD in 2019

Number of operators that are exporting from Morocco:
215
Supply chains' demand

Demand in Europe for products from Morocco is increasing and so are export quantities. 45% of export (t) go to France, 40% to Germany, 8% to Switzerland, 2% to the Netherlands and 5% to other countries. 56% are processed plant products, 22% are fresh vegetables and 21% citrus fruits.

A domestic demand is reported to be increasing, too. A 2014 survey showed interest in organic produce of 75% of people. "Beldi" is a local popular term for traditional products close to non-certified organic products. Consumers are sensitive to healthy and safe products, but also to price. The DIAF project concluded from own studies that consumers wish a diversification of the supply, an availability around the year and an improved quality management. It promotes a so-called 4x4 strategy (4 measures for the domestic and 4 measures for the export markets) to accelerate demand.

Supplies chains' supply

There is a wide range of products with potential to increase production and diversity to continue the trend since 2010 (production from 40,000 t to 100,000 t with exports from 10,000 to 17,000 t). Particularly the wild collection area grew.

In a Swisscontact survey, 85% of operators reported to do direct marketing. 20% delivered to specialised stores, 25% through wholesalers and 45% export directly. Operators often use various chains. They integrate supply to domestic and international markets and also supply to organic and conventional channels.

About 100 operators export their products with 40 export companies. Supply quantities in various products vary considerably from year to year.

Market place

There is a diversity of marketing strategies and market places for organic products. Export markets (and conventionally sold organic products) still dominate in terms of quantity. However, the importance of the domestic markets, which are more diverse and include certified and traditional forms of trade increase.

There are about 15 shops and restaurants that market organic products to consumers, mainly in Casablanca, Rabat, Marrakesh and Tanger. There is one chain with 4 shops (Green Village, earlier called La Vie Claire) with a big offer of 4,000 products (65% high priced organic import products). Domaine Agricole has 2 shops. There are also Internet market places like natureshop.com, bioland.ma or epicerieverte.ma. Various producers supply short chain markets and offer basket schemes, sell from the field/farm or they supply farmers markets.

Recent consumer interviews revealed a positive spirit and the expectation that demand will grow with a potential of 1% of the population buying regularly organic produce particularly fresh produce and typical Moroccan products. About 40% of operators for the domestic market supply packed and 60% supply unpacked products.

Supporting functions

**Organic Umbrella: FIMABIO** is a small umbrella organisation (voluntary and consultant work) bringing together three associations each representing one aspect of the value chain: Producers, processors and distributors / exporters. Swisscontact / seco earlier and Naturland / BMZ, AfrONet / AFD now support FIMABIO in institutional development and its stakeholder services for a long time.

**Promotion and PR:** Operators, NGO and media promote organic, however not in a coordinated way. Improving promotion and PR is part of the proposed 4x4 strategy of DIAF.
**Certification, ICS and PGS:** CCPB Morocco and Ecocert Morocco are accredited CBs in Morocco. CB Veritas, BMI, QC&I, and Lacon Morocco offer only EU, NOP and JAS certifications.

There is one PGS with 26 operators supervised by RIAM, the agroecology Network.

**Advocacy:** There is no organic desk at the ministry, but well-established relationship of the organic movement with decision makers on national level. ONSSA is the government unit to supervise implementation of the organic regulation with however no knowledge, resources and real mandate for which the sector wants it to take responsibility.

A number of civil society organisations work towards supporting general sustainable and agro-ecological approaches including e.g. World Wide Opportunities on Organic Farms (WWOOF), Migrations & Développement, Terre et Humanisme, RIAM (Agro-ecological Initiatives’ Network in Morocco), Fondation Pierre Rhabi etc.

**Trade facilitation services:** One organic trade fair took place so far. It was organised by the Club des Entrepreneurs Bio (CEBio) and Agissions Vert. FIMABIO and members uses the conventional food fair to promote organic.

**Research and Advise:** National Institute for Agricultural Research (INRA) is the only government institution dedicated to agronomy research in Morocco. It has also research in the organic sector with one employee. A more comprehensive organic research program of INRA is under consideration.

FIMABIO is the Moroccan hub for the GIZ continental project for organic knowledge centers. AfrONet implements in Morocco an AFD (France) project to promote innovations.

**Rules**

<table>
<thead>
<tr>
<th>Export Standards: No equivalence of the Moroccan regulation with any other organic regulation. Therefore, export countries' and private standards need to be applied.</th>
<th>Promoting policies: There are no organic subsidies and little government organic promotion.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Private standards and Regulations:</strong> Even though there is a government regulation there is misuse of the term organic in the local market.</td>
<td><strong>Trade governance:</strong> Complex administration for export procedures. The government has a committee to coordinate the sector: CNPBio (National multidisciplinary Commission on Organic Agriculture). Investors wish to have easier access to land and more flexibility to purchase or rent land.</td>
</tr>
</tbody>
</table>

**Conclusions**

Morocco has quite a good organic country governance and was rated second best in Africa by EOA-I. Structures and required elements of an organic sector are in place. Stakeholders are committed and participate in the global organic movements (e.g. BIOFACH presence, IFOAM and ISOFAR and AfrONet) memberships etc.). Nevertheless, the Moroccan organic sector is quite small compared to the size of the country and the existing potentials. Morocco had an early good start in the 1980s and 1990s, but it stagnated for a long time. In recent years, the sector became more dynamic and export volumes increased remarkably to 17,000 tonnes including of fresh (off season vegetables) and
processed products (e.g. frozen fruits, juices or oils). Particularly wild collection products (MAP and argan oil) developed well.

In recent years, there is also a domestic organic market arising particularly in the big cities for which there are unfortunately no statistics available. There is a diversity of initiatives of on the one hand very grassroots agroecological initiatives that are non-certified and PGS leaning to traditional Moroccan products (Beldi). On the other hand, there are short and long value chains that are served by certified operators and include supply to processing industries and exports as well as supply of fresh products directly to wholesale, shops and consumers. This organic market serves at the same time a very price sensitive, but food safety aware clientele and affluent consumers with special food preferences, which rely to a large extent also on imports.

Organic trade is also relevant for organic inputs including to organic and non-organic operators. The latter particularly to GLOBALG.A.P. certified and exporting operators for whom use of organic fertilisers and pesticides is more convenient. Such organic fertilisers and pesticides are produced in Morocco and exported.

**TUNISIA**

2.14. Tunisia

**Overview and development**

Tunisia has systematically reformed its agricultural sector to meet the growing demand of European consumers for organic products. In the last years, the organic sector was characterised by a high increase in area and farmers number, with more crop diversification and the organisation of the organic sector. This important development was the result of policies supporting this sector, the organisation and structures, and a national strategy. In 1999, it adopted a landmark legislation on organic agriculture (law 30-99), which led to the creation of a National Action Plan, to the establishment of the Technical Center of Organic Agriculture (CTAB) and the General Directorate of Organic Agriculture (DGAB), to the National Commission of Organic Agriculture (CNAB), and more than 20 Governmental Decrees and Orders that provide a comprehensive framework for Tunisia’s organic agricultural sector.

Figure: Organic export development in tonnes

Source: Khaled Sassi, Faten Ksouri and Fakher Ayed; North Africa Knowledge Hub, February 2020

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Today, Tunisia has the largest area of certified organic land in Africa and in the Arabic world and the 23\textsuperscript{rd} in the world covering some 336,000 hectares. The number of certified organic operators has grown from 481 in 2002 to 7900 in 2018, and organic exports have grown from 7 million Euro (3,000 tonnes) in 2004, to 34 million Euro (9,000 tonnes) in 2007 to 200 million Euro (60,000 tonnes) in 2018. These figures also reflect that volumes and values per volume (from 2.3 €/kg to 3.3 €/kg) have increased. \footnote{SASSI, KSOURI & AYED, 2020. Situational analysis of organic and ecological agriculture in Tunisia.}

Figure: Tunisian export development in 1,000 USD

Tunisia’s main crops of organic olives and organic dates are primarily (and increasingly) cultivated on small and medium sized farm holdings. Tunisia also produces fruits (almonds, peach, citrus), vegetables (tomatoes, potatoes, eggplant, pepper), aromatic and medicinal plants and honey. All in all, more than 60 organic products are exported in all continents. Olive oil occupied more than 45% of total organic exports.

Tunisia was recognised as an equivalent country by the EU in June 2009, and by Switzerland in 2011.

The domestic market of Tunisia is not very well developed. There are plans in the organic sector and the government to promote agritourism with organic products and to use organic products more in the hospitality industry along the touristic routes and beaches to create value addition and to highlight quality supply using the good organic reputation among tourists.

A directory of the North Africa Knowledge Hub shows more than 300 processors, out of which 240 are processing olive oil. Other processors deal with prickly pears, essential oils, dates, aromatic plants and others.

**Tunisia’s organic production**

*Infographic* Tunisia’s organic production

- **Organic certified agriculture land:**
  
  306,467 ha (converted and under conversion)

- **Organic certified other areas (wild collection):**
  
  25,486 ha

- **Percentage of Agriculture:**
  
  3.0%
Organic producers:
7,236

List of active certification bodies:
BCS Tunisie, Ecocert Tunisie, ICEA Tunisia, INNORPI, Lacon Tunisie, CCPB, Demeter, ProCert Safety

Table: Products and production in Tunisia

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olive oil</td>
<td>a) 241,152</td>
<td>b) 27,000 tonnes$^{64}$</td>
<td>EUR 73 million</td>
<td>c) Assuming EUR 2.7 /kg</td>
</tr>
<tr>
<td>Dates</td>
<td>a) 2789</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vegetables</td>
<td>a) 179</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fruits of temperate climate incl. citrus fruits</td>
<td>a) 11,243</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fruits of tropical/sub-tropical climate</td>
<td>a) 3,636</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cereals</td>
<td>a) 1,595</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual oil crops</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAP cultivated</td>
<td>a) 777</td>
<td>a) 0.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wild collected products incl. MAPs</td>
<td>a) 48,956</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Livestock (grazed land)</td>
<td>a) 22,595</td>
<td>n/a</td>
<td></td>
<td>only poultry &amp; wild game authorised for import to EU$^{65}$</td>
</tr>
</tbody>
</table>

Sources: a) FiBL, 2020, b) data from other sources, c) own estimates

From 1997 onwards - thanks to government support - organic agriculture evolved from a few individual producers’ operations to a sector that is backed with state-facilitated institutions, programmatic and market development activities, and explicit nationwide policy supports and measures. The organic production area has witnessed ups and downs (in 2010 there were more than 400,000 ha), which can be explained with the overall political and economic situation of the country (sharp decline after the Arab spring) and the fact that in 2018 a few big state estates decertified their operations. However, the number of farmers has increased continuously and developed strongly in recent years. The organic share of the total agriculture land in Tunisia ranked 42th in the world and 2nd in Africa (after Sao Tome).

$^{65}$ European Commission implementing decision 2011/163/EC
Tunisia subsidizes organic production (up to 1650 USD per farmer and 3300 USD per company). It has vast olive oil production capacity and reports that yields of organic operations are even higher than of conventional (including traditionally neglected orchards) production because of organic fertilisation efforts.

**Tunisia’s organic market**

*Infographic Tunisia’s organic market*

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**Main products for interregional export markets:**

Olive oil, Citrus fruits, tropical fruits, essential oils, dates

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**Main products for domestic and regional markets:**

Complete range including imported packed products

---

**Total volume of the exports:**

42,591 tonnes to EU in 2019 & 19,590 tonnes to USA

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**Total value of the exports:**

240 million USD in 2018

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**Number of specialised/overall outlets in the domestic market:**

20 organic outlets mainly in the North

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**Number of operators that are exporting from Tunisia:**

79

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**SUPPORTING FUNCTIONS**

- a) Organic umbrella
- b) Certification, ICS & PGS
- c) Annual trade fair; Government support for export
- d) Government scientific institutes, CTAB and CRHAB, Organic extension service in 24 directorates
- e) Little advocacy, no active consumer associations
- f) Organic regulation, extensive legal setting with 20 legal documents and many organic institutions
- g) Tunisia organic regulation equivalent to EU and CH, via EU also to US/IAS
- h) Extensive government promotion policies in all aspects, e.g. research, extension, strategic plans, promotion etc.
- i) Promotion & PR
- j) Trade governance

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**RULES**

- a) Organic umbrella
- b) Certification, ICS & PGS
- c) Trade facilitation
- d) Research & advise
- e) Advocacy
- f) Export standards
- g) Private standards & Regulation
- h) Promoting policies
- i) Trade governance
Supply chains' demand
Demand comes mostly from export markets in Europe, USA and Middle east, the EU olive oil market being the main market for the Tunisian organic sector. Tunisia's domestic market for organic products is small with about 20 specialised organic shops. Retailers offer increasingly a few organic products and hospitality industry starts recognising the value of organic products for profiling and image promotion. Consumer awareness is low. Even in the main product (olive oil) organic demand is much lower than supply so that the biggest quantity is commercialised in the national and international market as conventional product. Consumer on the local market complain about a limited and unstable offer and unsatisfactory quality (e.g. produce not fresh any more). Organic animal husbandry products (e.g. eggs, diary or meat) are hardly available.

Supply chains' supply
Supply of main products is abundant and production is growing. Yields are generally only little below conventional production. While there are many processing operators for the main products, there is little diversity and low overall quantities apart from the main products. Supply may be disrupted in fruit and vegetables depending on the year, on the water availability and on pests mostly due to unavailability of inputs (the same applies to animal husbandry, where e.g. organic feed in unavailable). There is a mismatch in the domestic market as domestic consumers have difficulties to find a demand covering assortment and producers do not find sufficient clients for marketing production that is sufficient in scale to be profitable.

Market place
The international market works based on established trade relationship and with the competitive advantage (price, quality) of Tunisia in the main products.

In January 2020, there were 19 outlets, out of which 5 were in Ariana, 4 in Tunis and 3 in Ben Arous. Retailers occasionally offer organic products at a very high price, however in low quantities and without strategy.

Supporting functions
**Organic Umbrella:** There is a vast network of government institutions that coordinate organic agriculture under the lead of DGAB (Direction General de Agriculture Biologique, the competent authority) and CTAB (Centre Technique de l'Agriculture Biologique, the government umbrella). There is a national committee of organic agriculture (CNAB). However, the civil society is weak. Even though the sector is mainly driven by the state, FNAB and ATAD are two civil society organisations promoting organic and supporting operators e.g. in bringing research to operators, in advisory services, trade fairs and other events, or in

**Advocacy:** FENAB holds the voice of the civil society, however the government clearly leads sector development with its vast measures based on its strategic goals and the leadership of certain civil servant's personality rather than through the lobby pressure of stakeholders.
organising group certification for small scale farmers.

**Certification, ICS and PGS:** Ecocert, CCPB, KIWA BCS, CERES (all international), and INNORPI (local) are the certification bodies operating in Tunisia. Most operators are organised in ICS. PGS is not known and not foreseen in the legal framework. Quality assurance service are poorly developed. One lab at CTAB (supported by Seco) is under construction.

**Promotion and PR:** Little activities despite the need and low consumer awareness due to priority to export. Main promotion is done to tourist operators and in BIOFACH Nuremberg.

**Trade facilitation services:** Tunisia has an annual trade fair for the last 10 years, the Bio-Expo. It is a BtoB and BtoC event that includes organic exhibitions, demonstrations, workshops and conferences. The event also hosts conventional natural products and deals with food, cosmetics and packaging.

**Research and Advise:** Extensive research activities in CTAB and the Regional Research Centre in Horticulture and Organic Agriculture (CRRHAB) and other government research institutes. The DGAB (competent organic authority) has all in all more than 80 staff, out of which over 70 are based in the 24 provinces for advisory services to organic farmers. The GIZ supported Organic Knowledge Hub for North Africa also operates in Tunisia from CTAB.

**Rules**

**Export Standards:** Tunisia's regulation is equivalent to the EU and Swiss organic regulations. Exports to the USA go either through the EU or are certified with NOP standard. Tunisia’s reference to the IFOAM Basic Standards, EU organic regulations, and Codex Alimentarius in the organic regulations has promoted trade and opened Tunisia’s organic products to international markets.

**Promoting policies:** The Tunisian government has engaged in multiple collaborative relationships between specialised organic institutions and other public and non-government establishments. The government has also provided financial support for the organic sector and established institutional structures to conduct research and provide training. There are extensive measures promoting organic agriculture by the Government of Tunisia. The policy support is uniquely oriented to organic farming and its economic potentials. Agroecology, permaculture or other sustainable land use management concepts are not reflected. IFOAM Organics International has published details of the organic program and sees it as one of the most comprehensive government organic measures worldwide.

**Private standards and Regulations:** The BioTunisa mark, used since 2010, expresses compliance with the national regulation. There are no private standards in the domestic markets but Demeter, Naturland, Soil Association or Bio Suisse

**Trade governance:** The World Bank rated Tunisia in 2019, the 5th in Africa regarding conducive environment for businesses. Detail indicators provide average marks in comparison to world standards with a slight plus in participation and rule of law, however with a

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Conclusions

There is no doubt, Tunisia is in many aspects of organic development, framework and trade a leading country in Africa and a very interesting case study. It has started to use the economic opportunity for production and sale at an early stage and the government has invested remarkably into the sector. These investments pay back in particular if the strong growth to over 200 million Euro in export in the last few years is considered.

60 products seem to be a big diversity. However, the bulk is on few raw and little processed products with not a very high value addition. The business case is focused on exports and until recently (a new draft government strategic plan with horizon 2030 wants to address that), the domestic organic market development was left behind and hence is still at an infant stage. Despite the impressive institutional landscape and the volume of exports including its growth, there is no comprehensive sector development that includes e.g. a diversified processing industry, animal husbandry production, input supply (e.g. seeds, feed, plant protection, mechanisation tools etc.), quality assurance infrastructure, consumer and public dialog and many more elements. Dynamic growth and upcoming needs in the sector show that the sector is developing including in quantity (rising export volume) and to cover the gaps (comprehensive offer of services).

The sector is presently strongly focused on non-African markets. If Africa develops appetite for Mediterranean products such as olive oil or citrus fruits, Tunisia will be very competitive given the weak currency and the lower production costs.

**EGYPT**

2.15. Egypt

**Overview and development**

Organic agriculture in Egypt began in the late 1970s. Market demand from Europe has to a large extent driven the development of the sector, the supply of high-value counter-seasonal vegetables to the EU being particularly rewarding. The major organic crops produced for export are fruit and vegetables including (early) potatoes, as well as a variety of herbs (MAP).68

Around 3% of agricultural land in Egypt is organically cultivated. The organic farmland increased from 2,667 ha in 2004 to about 116,000 ha in 2018, which is one of the highest in Africa. There were estimated growth rates of the market of around 15% per year, but at the same time Egypt had setbacks in 2011 due to political unrest and in 2017 when both national certification bodies lost international accreditation. Particularly processors of MAP report that they could process and market much higher quantities.

Egypt has a relatively well-developed organic sector with many stakeholders. There are various active NGOs and an active private sector with the Sekem Group and its institutions being an international flagship for social entrepreneurship and organic system building. There is government sector support, however with limited priority and means. It took more than a decade before an organic regulation passed in January 2020.

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There is no stakeholder legitimised sector umbrella organisation and fora to push development, but there are various organic development projects predominantly supported by the German government starting to support innovation, institution building and knowledge management.

The sector has various serious issues including residues management and contaminations from soil, air and water pollution and drift of spraying and through drainage of fertilisers into the groundwater. The quality of processed organic agricultural products from Egypt are often criticised by importers from Europe/USA.

The domestic market is small but arising in big supermarkets (e.g. Carrefour or Hyper One), through short chain markets by producers (e.g. Sara Organic Farm) and a few new specialised shops. There is limited availability and diversity of products and little reliability of claims. Price premiums are very high and quality of fresh produce rather poor.

The concept of PGS is not known in Egypt and the local market uses a third-party certification system. However, in 2020 some companies launch a private standard called "Economy of Love", based on the biodynamic standard, which compared to organic, has additional socio economic and cultural requirements but which also has more flexibility in terms of residues.

Egypt's organic production

<table>
<thead>
<tr>
<th>Organic certified agriculture land:</th>
<th>116,000 ha (converted and under conversion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic certified other areas (wild collection):</td>
<td>60,000 ha</td>
</tr>
<tr>
<td>Percentage of organic agriculture (of agriculture land):</td>
<td>3.1 %</td>
</tr>
<tr>
<td>Organic producers:</td>
<td>970</td>
</tr>
</tbody>
</table>

List of active certification bodies:

A CERT, AsureQuality, BCS, CCPB (branch office in Egypt), CERES, Center for Organic Agriculture in Egypt (head office in Egypt), Egyptian Center of Organic Agriculture (head office in Egypt), Lacon, Naturland, ProCert Safety, Soil Association, Suolo e Salute

Sekem Group

Sekem is a group of companies dealing with organic production, processing and trade with various trademarks for the local and international markets. Sekem was founded in 1977 by Ibrahim Abouleish who started to reclaim desert land for biodynamic production. Sekem has also schools, universities and health facilities and emphasizes apart from economic activities social, environmental and cultural values. It has about 3,000 workplaces and is an international inspiration for social entrepreneurship with many awards including the Alternative Nobel Prize. Sekem plays an important role in the national organic movement and value chains, but it has never been a role model for other entrepreneurial activities.
## Table: Products and production in 2018 in Egypt

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAPs (marjoram, caraway, anise, calendula, spearmint, peppermint, basil, thyme, hibiscus, cumin, celery, parsley, dill, geranium, fennel, lemon-grass and chamomile)</td>
<td>a) 34,979</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Potatoes</td>
<td>a) 13,815</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Vegetables</td>
<td>a) 11,880</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Onions</td>
<td>a) 5,125</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Wheat</td>
<td>a) 4,599</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Maize</td>
<td>a) 3,176</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Garlic</td>
<td>a) 3,105</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Sugar beet</td>
<td>a) 2,246</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Grapes</td>
<td>a) 2,157</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Lucerne</td>
<td>a) 1,964</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Oilseeds (peanuts and sesame)</td>
<td>a) 1,623</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Cotton</td>
<td>a) 1,338</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Olives</td>
<td>a) 1,103</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Beans</td>
<td>a) 1,035</td>
<td>n/a.</td>
<td>n/a.</td>
<td></td>
</tr>
</tbody>
</table>

a) FiBL statistics

**Analysis**

Two third of organic production in Egypt is located in the Nile delta (Behera Governorate 28%, Ismailia 9%) or in El Fayoum (25%). Over 900 producer groups (ICS) of mostly very smallholding producers cultivate 116,000 ha of land. Most organic production is supplied to the 242 processing companies (e.g. drying herbs) or to the export market (e.g. early season potatoes, fruits and vegetables). The Sekem group with its various companies supplying among others organic cotton clothes, teas in bags, juices, oils, medical and aromatic plants and other fresh and processed food is the single most important buyer. Sekem produces with an exceptionally high share for the local market. There are also some rising innovative initiatives that established e.g. basket schemes or make cooking events with organically grown food and specialty varieties. Again spearheaded by Sekem, there are innovative private sector projects to cultivate the desert (e.g. Bahareya, Minya or Wahat for 2,000 ha) organically and to create new agriculture land with diversified products contributing to the sustainable production that is creating environmental and social benefits as well as to the unsatisfied market demand.
Egypt's organic market

Infographic Egypt's organic market

Main products for interregional export markets:
Herbs, vegetables (potatoes, onions, garlic, green beans, peppers and peas) and fruits (citrus, mangos, grapes and olives)

Main products for domestic and regional markets:
Vegetables, wheat, maize

Total volume of the exports:
56,591 tonnes to the EU in 2019

Total value of the exports:
n/a

Number of specialised/overall outlets in the domestic market:
n/a

Number of operators that are exporting from Egypt:
242

Letters in the donuts refer to:
a) Organic umbrella
b) Certification, ICS & PGS
c) Trade facilitation
d) Research & advise
e) Advocacy
f) Promotion & PR
g) Export standards
h) Private standards & Regulation
i) Promoting policies
j) Trade governance
### Supply chains' demand

Export demand is reported to be high and unsatisfied. Processors claim that their biggest problem is to find sufficient quantity (in the required quality). The problem is increasing due to more and more quality issues (deteriorating quality with growing population pressure, smaller land per farmers and increasing regulatory requirements in export markets) and a fast-growing market in Europe. Local awareness for sustainability of food production and health is growing and so are the food safety concerns. Organic food is considered to be safer (no pesticide and certification of production) and hence more demanded.

### Supply chains' supply

Supply is extremely scattered and trust between trade actors is an issue. Smallholders are very small (< 1-2 ha) and due to big families and the succession traditions to split properties among sons they become even smaller. Many producers do not manage to produce any more due to increasing external contamination and they give up their ICS membership. Access to agriculture inputs (seeds, compost, bio-pesticides) is difficult. At the same time, new land reclamation projects in the desert provide new prospects and opportunities to satisfy demand. Various projects support conversion.

### Market place

There are no centralised BtoB trade facilitation events and platforms. Exporters have a direct relationship to importers and meet directly or at BIOFACH in Nuremberg.

The domestic market to consumers works uncoordinated on three levels:

- a) farmer's delivery/basket scheme (to consumer and restaurants)
- b) specialised shop (less than 10 in Egypt)
- c) big supermarkets that offer organic brands (e.g. ISIS) or occasional fresh products.

### Supporting functions

**Organic Umbrella:** No umbrella organisation exists. "Organic Egypt" is a new project trying to empower NGOs to deliver services for producers. EBDA is an umbrella for Demeter production. So even if there are many organic institutions, the sector is poorly coordinated.

**Certification, ICS and PGS:** A CERT (Greece), Agroeco (Germany), Agricert (Portugal), CCPB (Italy), CERES (Germany), Control Union (Netherlands), Ecocert/IMO (France), KIWA/BCS (Germany), Letis (Argentina), Q-Tech (Greece), Suolo et Salute (Italy), TüV Nord (Belgium) are international CBs that are active in Egypt. COAE and ECOAS are private local CBs (once market dominant, but both lost clients and international accreditation and try to regain it). CLOA (Central Laboratory for Organic Agriculture) is the competent authority in the Ministry of Agriculture and Land Reclamation. It accredits CBs and registers operations. There are two accredited quality testing labs in Egypt. QCAP (Central Lab of Residue Analysis of Pesticides and Heavy Metals in Food) and the Pesticide Analysis Lab of Cairo University.

**Promotion and PR:** Promotion and information of the public about organic is left to the operators, mainly to Sekem and the few direct marketing farm operations. Organic may be discussed in the media in relation to food safety or by highlighting success stories.

**Advocacy:** Advocacy is not common and the civil society is very careful in expressing positions that might be seen as contradiction to government policies. They do not want to risk closure of their organisation and operations. There is however technical dialog on high level e.g. with the Universities about organic policies e.g. relating to the organic legislation, to GMO or to include fertiliser subsidies to organic fertilisers as well. On top, positive impact evidence e.g. through Sekem and Heliopolis University and successful land reclamation projects are welcome.
Trade facilitation services: Information about the organic sector in Egypt is scare. There are various country reports all emphasising that there are little reliable data and resource persons with an overview and access to important information such as (reliable) statistics, technical advice or market information. In principle, there is the Union of Growers and Exporters of Organic and Biodynamic Agriculture, but we couldn’t identify their services.

Research and Advise: There are government supported universities that have departments supporting organic agriculture: 1. The Al-Azhar University with the Department of Environment and Organic Agriculture. 2. The Ain Shams University, Department of Organic Agriculture. 3. Cairo University with a Bachelor of Science (BSc) Program. 4. Heliopolis University, a private university founded by Sekem with an organic agriculture faculty. The Agriculture Research Center (ARC) of MALR also researches aspects of Organic agriculture (e.g. plant protection). CLOA of MALR has also training functions.

There are a number of NGOs that are supporting producers. They include the Union of Growers and Exporters of Organic and Biodynamic Agriculture (UGEEOBA) (established 1998); Fayoum Agro-Organic Agriculture Development Association (FAODAS) (2003); Tomorrow’s Youth for Organic Agriculture (TYOG); Ecological Agriculture Protection Association (EAPA); Egyptian Centre of Organic Agriculture Society (ECOAS); Wafaa Society for Organic Agriculture Development (WSOAD) and the Council of Organic Agriculture within the Egyptian Agribusiness Association (EAGA)

Rules


Promoting policies: Apart from protection of the varieties and aerial spraying of cotton, there are no Egyptian promoting policies for organic production. Egypt has no restriction to research, produce and market GMO including for cotton.

Private standards and Regulations: The new Egyptian organic regulation was ratified by the parliament in January 2020. It only applies for the local market until it is recognised being equivalent e.g. the EU.

Trade governance: CLOA (the Central Laboratory for Organic Agriculture) is the highest authority for Organic Agriculture in the country. It has ?? staff and vast portfolio of services including organic operations registry, CB accreditation, product specifications, research and extension and public relations about organic. The Ministry of Trade and Industry has a committee on organic agriculture including with representatives of private business and ministry officials.

Conclusions

Egypt is with no doubts an important organic trade country with a lot of potentials. It has many challenges given the limited fertile space in a fast-growing population, which is expected to grow from 100 to 150 million people by 2050. Contamination in an increasingly polluted area along the
Nile, the one water stream of Egypt, makes it more and more difficult to produce in a sensitive market. Still, potentials lie in in high value crops (MAP), in off season products and processed crops for local value addition for export and increasingly also for the domestic markets, which are all hungry for supply.

Tourism and use of organic products in the hospitality industry is an untapped potential to increase value addition with organic products. Sekem promotes organic in its vision 2057 not only for its own operations but for whole Egypt and is increasingly heard. There is the so called Sustainable Agricultural Development Strategy (SADS) 2030 of the government. It analyses the "advantages of conversion to green economy and sustainable development" talking about the benefits of sustainability and promoting the recycling of organic matter. It sets targets of 20% conversion to sustainable agriculture by 2030 including 350,000 ha of organic land, which is more than 3 times higher than today. Reaching these goals is challenging in the Nile valley and delta, in the so-called old land due to structural problems, overpopulation and high pollution. However, there is vast unpolluted space with little structural problems, less social resistance to change and risk aversion in the so-called new land with reclamation of the desert, provided access to water supply can be sustainably guaranteed and provided that investors are found.

2.16. Conclusions on prioritisation and segmentation for future action

The regional and country analyses show a big diversity of the history of the different countries, the understanding of concepts, the collaboration of various groups and what they have achieved. Stakeholders shaped the organic sectors and managed sometimes more, sometimes less to create opportunities in their specific situation and to use them for their benefit. Each region and country is unique and the conclusions need to be drawn one by one. Nevertheless, there are common lessons and important considerations from the geographic perspective to feed in the overall strategic conclusions in Chapter 5 and the strategic options in Chapter 6. They are for example:

- In all countries, the export figures for organic by far exceed the domestic consumption. Only South Africa has a good consumer demand for certified organic products and also attracts imports of organic produce (with some exceptions in North Africa and to expatriates and tourists in East and West Africa). There are various countries with some growing demand for non-certified organic producers including 'organic by default', 'natural' and products from PGS with their own standards and verification systems. However, this non-certified demand is not well or not at all registered and can therefore not quantified.

- All countries, except for South Africa and some North African countries, have predominantly a strategy of exporting primary produce and show limited processing and value addition in the country. Opportunities lie in the field of value addition and investing in local processing for both the international as local markets.

- The main exported organic products are coffee, cocoa, olive oil, cashew nuts, shea nuts and gums. Other important products for which the value could not be estimated include tropical fruits, fresh vegetables, citrus fruits and MAPs. Internationally, there is a growing demand for organic produce from Africa that are not grown in the main international market or not available off-season. For some, product demand exceeds supply, for example MAPs. Also locally, there are a few cases where demand exceeds supply, e.g. in Central Africa.

- In all countries there are efforts for domestic market developments which is mostly driven by food safety concerns and by a growing middle-income class. There is limited awareness on the values and benefits of organic agriculture at consumer level.

- On the supply side the domestic market PGS could offer interesting solutions. While in North Africa, the European model of guarantee system with third party certification prevails, Sub Saharan Africa relies on PGS development. And while stakeholders struggle with the complex PGS requirements and many PGS are not fully functional assessed against the IFOAM criteria,
PGS is in practice very flexible and adaptive to local needs. However, it needs to be regulated and harmonised.

- The countries and the formal and informal rules of the national economies are very dominant orientation frameworks for stakeholders. Regions exist but there is little regional collaboration and trade. Local trade oftentimes is oriented to national centres and international trade usually looks at the big markets outside Africa. For EU and USA however, African countries and Africa as a whole are comparatively small players.

- While international trade provides national income and strong currency, the analyses point to a big unserved potential demand in domestic and regional markets. This is in particular true for products which matter to Africans, with innovation and value addition potential: processed foods (dried and otherwise), sweet potato, avocado, mango, tree tomato and persimmon, beans & pulses, honey & bees wax, ingredients for cosmetics and health(y) foods (think of e.g. shea, baobab, gums, cosmetic oils such as Macadamia, herbal teas with hibiscus and moringa, medicinal & aromatic plants).

- Domestic and regional trade can be more participatory and inclusive (compared to export trade), involving smallholders, women & youth, disadvantaged groups. Producing at relatively lower cost with PGS can make production systems more diversified and value-added (processing) for local markets. This in turn can make production systems more resilient (lowering risks for producers), thus offering a good starting point for principles of organic agriculture and agroecology (without costly certification), and such ecosystem services as proper soil and water management.

- Especially for international trade, individual entrepreneurs (either as international buyer or as a local company) are often a strong factor in successful business and take care of required investments. However, when it comes to further developing the local organic sector, institutions and structures of the Governments and the organic sector are crucial for trade development. Infrastructure (e.g. laboratories, certification, communication, research and advise, trade and trust relationship) is required to make the private sector successful. Countries that collaborate well between the various movements and between government, civil society and the private sector tend to be more successful.

- External investments by donors had a big impact. Regions with donor investments developed better than regions without support (e.g. East Africa in an early stage, West Africa with recent support only develops dynamically now and Central Africa is neglected). The main contribution of international cooperation is the facilitation of the local stakeholders that need ownership and power to steer own developments. Good examples are available for various issues (e.g. PGS in South Africa, Uganda and Burkina Faso, organic state governance in Tunisia or beacon private sector social enterprise Sekem in Egypt).

- The fact that formal trade figures on organic agriculture in Africa are extremely limited, illustrates the relatively still immature status of the sector, despite a long tradition of the organic movement across the continent.

- For further local market development, the use of terms and also the collaboration between groups representing the various agriculture systems included in this study vary. The term Ecological Organic Agriculture generally unites best, while Agroecology paired with Food Sovereignty in some places is particularly distant to EU/NOP regulation third party certified intercontinental Organic trade. While the various schools of thought are generally more united than in other parts of the world, the level of collaboration and conflicts vary from country to country.
3. Understanding production and markets of value chains

In addition to the analysis from a geographical perspective of the previous Chapter, Chapter 3 uses the angle of value chains. The selected value chains, apart from their relevance in value, represent a globally traded commodity (coffee), locally and international consumed fresh or processed products (tropical fruits) and an African-only originated ingredient for the food and cosmetic market (shea). With this selection a diverse range of products and value chains is added to the market analysis.

3.1. Overview of main organic value chains in Africa

Africa is a large continent with many different climate zones with different production conditions. As a result, Africa produces a large variety of products. And while some of these products such as coffee are produced in different regions across the continent, the characteristics of each of these coffees is quite unique.

Table: Organic Products and production in Africa

<table>
<thead>
<tr>
<th>Products</th>
<th>Area (converted and under conversion (ha))</th>
<th>Volume (t)</th>
<th>Export (in EUR)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cashew nuts</td>
<td>a) 90,228</td>
<td>a) 31,193</td>
<td>d) 262 million</td>
<td>d) Assumption: EUR 8.4 /kg</td>
</tr>
<tr>
<td>Coffee</td>
<td>a) 361,640</td>
<td>a) 58,873</td>
<td>d) 130 million</td>
<td>d) Assumption: EUR 2.2 /kg; Uganda prod'n not reported</td>
</tr>
<tr>
<td>Olives (oil)</td>
<td>a) 243,550</td>
<td>a+b) 32,840</td>
<td>d) 99 million</td>
<td>d) Assumption: EUR 3 /kg</td>
</tr>
<tr>
<td>Cocoa</td>
<td>a) 171,362</td>
<td>a) 30,408</td>
<td>d) 79 million</td>
<td>d) Assumption: EUR 2.6 /kg</td>
</tr>
<tr>
<td>Shea nuts</td>
<td>a) 245,969</td>
<td>d) 19,000</td>
<td>d) 38 million</td>
<td>d) Assumption: EUR 2 /kg</td>
</tr>
<tr>
<td>Gums</td>
<td>a) 981,266</td>
<td>a) 10,333</td>
<td>d) 30 million</td>
<td>d) Assumption: EUR 3 /kg</td>
</tr>
<tr>
<td>Sesame</td>
<td>a) 95,933</td>
<td>a) 23,439</td>
<td>d) 26 million</td>
<td>d) Assumption: EUR 1.1/kg</td>
</tr>
<tr>
<td>Cotton</td>
<td>a) 104,373</td>
<td>a) 5,592</td>
<td>d) 11 million</td>
<td>d) Assumption: EUR 2 /kg</td>
</tr>
<tr>
<td>Apiculture (honey)</td>
<td>a) 2,573,441</td>
<td>a) 2,574</td>
<td>d) 5 million</td>
<td>d) Assumption: EUR 2 /kg</td>
</tr>
<tr>
<td>Tropical fruit</td>
<td>a) 40,226</td>
<td>a) 162,047</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Fresh veggies &amp; melons (incl. garlic, onions, pulses)</td>
<td>a) 39,868</td>
<td>a) 60,391</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>Citrus fruit</td>
<td>a) 7,539</td>
<td>a) 26,652</td>
<td>n/a.</td>
<td></td>
</tr>
<tr>
<td>MAPs (wild and permanent)</td>
<td>a) 2,857,875</td>
<td></td>
<td>n/a.</td>
<td></td>
</tr>
</tbody>
</table>

69 The suggested prices follow from rough estimations from export data (value/volume) of conventional raw and processed products and/or other sources of market information and/or the expert’s experience with the product.
The order of importance of value chains depends on the indicator used to quantify the importance. In terms of total land area where products are produced or collected, MAPs and honey are the most important value chains in Africa. In terms of volumes, tropical fruits are clearly the most important value chain. And in terms of estimated export value, cashew nuts appear to be the most important value chain.

However, quantitative data do not provide the full picture. Qualitative information following from interviews and the expert’s knowledge suggests that fruit and vegetables are the most important organic value chains in Africa. Whereas tropical fruits and off-season fruits and vegetables are major export products, many fruits and vegetables also find their way to local organic markets where they are appreciated as safe and nutritious foods.

### 3.2. Coffee

**Overview and development**

The two most commercially important species of the coffee tree are *Coffea arabica* (Arabica) and *Coffea canephora* (Robusta). In 2019, about 56% of global coffee production was Arabica. Arabica coffee beans are known to have a smoother, less bitter taste than Robusta. Robusta beans contain a higher caffeine content (approximately 2.7%) compared to Arabica beans (1.5%).

Coffee is grown in 29 African countries. Total African coffee production amounted to about 1.2 million tonnes in 2018. Africa accounted for almost 52% of the global organic land for coffee production. East Africa is the largest organic coffee producing region, where, volume-wise, particularly Ethiopia stands out.

The European Union is the world’s largest single-market for green coffee. According to Eurostat, total import volumes reached 3.1 million tonnes in 2019, of which an estimated 4.3% (130 thousand tonnes) was organic. Between 2018 and 2019, organic coffee imports by the EU increased by almost 12%. According to USDA GATS, the USA imported an estimated 1.6 million tonnes of green coffee in 2019, of which 5.7% was organic. Organic coffee imports by the USA increased by almost 37% between 2018 and 2019.

A growing consumer interest in healthy living, in combination with growing sustainability concerns by both industry actors and consumers, drives up the demand for organic coffees in both Europe and the USA. Parallel to this development, there is also a growing demand in Europe and the USA for specialty coffees. This makes that especially the niche market for high-quality organic coffees provides interesting opportunities for African coffee producers, as coffees with these characteristics usually command higher premiums.

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72 Willer et al., 2020. The world of organic agriculture.
Coffee production

Infographic of the coffee production

Certified organic coffee area (converted and under conversion) in ha, in Africa, in 2018:

361,640 ha

List of African countries which produce coffee, including total production volumes (organic and conventional) in 2018:

- Ethiopia: 470,221 tonnes
- Uganda: 211,200 tonnes
- Ivory Coast: 88,867 tonnes
- Madagascar: 57,451 tonnes
- Tanzania: 55,770 tonnes
- Guinea: 42,900 tonnes
- Kenya: 41,375 tonnes
- Cameroon: 33,164 tonnes
- Democratic Republic of the Congo: 29,673 tonnes
- Rwanda: 21,548 tonnes
- Togo: 21,023 tonnes
- Angola: 16,079 tonnes
- Burundi: 14,216 tonnes
- Malawi: 11,082 tonnes
- Central African Republic: 9,145 tonnes
- Zambia: 7,104 tonnes
- Equatorial Guinea: 4,251 tonnes
- Congo: 3,041 tonnes
- Nigeria: 1,849 tonnes
- Mozambique: 846 tonnes
- Ghana: 735 tonnes
- Liberia: 648 tonnes
- Zimbabwe: 525 tonnes
- Comoros: 137 tonnes
- Gabon: 88 tonnes
- Benin: 51 tonnes
- Cabo Verde: 35 tonnes
- Sao Tome and Principe: 10 tonnes

Table: Organic coffee production in Africa, in 2018

<table>
<thead>
<tr>
<th>Countries</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cameroon</td>
<td>a) 203</td>
<td>a) 62</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cape Verde</td>
<td>a) 495</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DR Congo</td>
<td>a) 8,595</td>
<td>a) 384</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethiopia</td>
<td>a) 161,113</td>
<td>a) 51,435</td>
<td>d) 187 million</td>
<td>d) Assumption: average export price USD 4,104 /tonne</td>
</tr>
<tr>
<td>Kenya</td>
<td>a) 251</td>
<td>a) 5,000</td>
<td>d) 23 million</td>
<td>d) Assumption: average export price USD 5,200 /tonne</td>
</tr>
<tr>
<td>Madagascar</td>
<td>a) 652</td>
<td>a) 171</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Malawi</td>
<td>a) 114</td>
<td>a) 15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rwanda</td>
<td>a) 676</td>
<td>a) 138</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sao Tome and Principe</td>
<td>a) 429</td>
<td>a) 51</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

<table>
<thead>
<tr>
<th>Country</th>
<th>Volume (tonnes)</th>
<th>Export Price USD</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sierra Leone</td>
<td>37,709</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>4,095</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Tanzania</td>
<td>81,740</td>
<td>1,617</td>
<td></td>
</tr>
<tr>
<td>Uganda</td>
<td>65,570</td>
<td>n/a</td>
<td>d) Assumption: average export price 1,988/tonne</td>
</tr>
</tbody>
</table>

* Value is estimated as a multiplication of the volume by the export price.

We differentiate here between a) FiBL statistics b) other statistics c) resource person estimates d) own estimates.

According to FiBL data, total organic coffee production in Africa amounted to 59 thousand tonnes in 2018. This is a small share, given that the total African coffee production reached 1.2 million tonnes that year. Note, however, that the real number of organic coffee production will be higher, in part because data on production volumes by Uganda is not reported.

The largest organic producer is Ethiopia. Unlike in most other African countries, about half of the national coffee production in Ethiopia is consumed domestically. Nevertheless, organic certified coffees are directed to the export markets, given their higher export prices. Uganda is also a well-known large organic coffee producing country, just like Tanzania.

The largest competitors of organic coffee producers are found in Latin America. In 2019, Peru, Honduras and Mexico were the largest organic coffee exporters to the EU and the USA. Indonesia is also a large supplier of organic coffee to the USA.

The coffee market

Infographic of the coffee market

Total volume of total (conventional + organic) coffee exports in 2018:
- Uganda: 252 thousand tonnes
- Ethiopia: 111 thousand tonnes
- Tanzania: 56 thousand tonnes
- Kenya: 45 thousand tonnes
- Rwanda: 22 thousand tonnes
- Burundi: 17 thousand tonnes
- DR Congo: 6 thousand tonnes

Total value of total (conventional + organic) coffee exports in 2018:
- Uganda: 436 million USD
- Ethiopia: 376 million USD
- Kenya: 228 million USD
- Tanzania: 145 million USD
- Rwanda: 71 million USD
- Burundi: 41 million USD
- DR Congo: 19 million USD

Main target markets of organic coffee and their import volume in 2019:

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75 European Commission, 2020. EU imports of organic agri-food products
76 USDA GATS database, 2020
77 International Trade Centre, Trade Map, 2020
78 International Trade Centre, Trade Map, 2020
Supply chains' demand

The largest demand for organic coffee comes from the EU and the USA. In both markets, organic coffees are sold through multiple retail channels, and can be found across all price ranges, depending on the coffee quality. Most organic and mainstream retailers have introduced their own organic private label coffee ranges, which resulted in a vast expansion of organic coffee availability. Private label coffee products offer the same quality and characteristics as branded products but are usually offered at more competitive prices.

Within the specialty coffee market, certification is often not a must. Nevertheless, there is a growing interest in organic certified specialty coffee (both Arabica and Robusta) by North American and European coffee buyers. Consumers in these markets are increasingly interested

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in products that comply with higher standards of health, quality and safety. Also, coffees that are both organic and fair trade certified are finding more consumer interest.

Japan is also an important market for organic coffees, mainly from Ethiopia, Rwanda and Uganda.\(^{80}\)

In countries like Kenya, Uganda, and Tanzania there is a very small domestic demand for organic coffees, mostly driven by expat communities. These coffees are sold through retail channels, farmers markets and food service channels. Most organic products, however, are neither formally certified, nor operating within a participatory guarantee system. As such, organic coffees and traditional coffees are usually sold for similar prices.

It is important to note that - although demand for organic coffees is growing – a general problem for certified coffees is that the production volumes of these coffees are above actual market demand, meaning that a large percentage of certified coffees is not sold as such. Although the production/sales balance for organic coffee may not be as skewed as for other certification standards, it is important to keep an eye on market demand and examine whether the investment in organic certification provides a country/its farmers with a competitive advantage.

### Supply chains' supply

The organic coffee production in Africa is only a small share of its total coffee production. The average land size allocated to grow organic coffee by farmers is 0.78 acres.\(^{81}\) Although coffee is grown in 29 African countries, organic coffee production has only been reported by 13 African countries. The available data suggests that organic coffee production is limited, and that most organic coffee is produced in East Africa.

The largest organic coffee producer is Ethiopia, mainly producing Arabica coffees. About 90% of coffee produced in Ethiopia is de facto organic\(^{82}\), as it is not common for Ethiopian coffee farmers to use pesticides. Nevertheless, only a small share of coffee producers holds organic certification, mainly because of the difficulty of traceability and the limited history and supporting functions in Ethiopia. As such, many farmers are locked out of the organic market and its premium prices.\(^{83}\)

In general, the national coffee institutes in Africa are much focused on increasing productivity, not favouring organic production. In Burundi, the inadequate supply of organic fertilisers is an obstacle to the development of the country’s organic coffee production\(^{84}\), while the freely distributed chemical fertilisers by the Rwandan government poses challenges to the organic production potential in Rwanda.\(^{85}\)

Uganda is Africa’s largest coffee exporter in volume, and mainly produces conventional Robusta, which is destined for the soluble coffee market or is used in blends. Nevertheless, Uganda is also a source for organic coffees. There have been projects aiming to boost organic coffee production, and there are cooperatives in the country that specifically focus on producing organic Fine Robustas. An example is the Ankole Coffee Producers Cooperative Union (ACPCU), which exported over 200 containers (around 20 tonnes per container) of organic coffee to the international market in 2016.\(^{86}\)

Coffee producers in Africa often refer to their national organic agriculture movements or national coffee institutes to seek for support for organic farming.

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\(^{82}\) UNCTAD, 2018. Commodities at a glance; Special issue on coffee in East Africa.

\(^{83}\) Asoko Insight, 2019. Ethiopia’s Coffee Exporters.

\(^{84}\) UNCTAD, 2018. Commodities at a glance; Special issue on coffee in East Africa.


Market place
Most coffee in East Africa is sold through the national centralised auction systems of either Ethiopia, Kenya, or Tanzania. Although these centralised systems help assure quality and regulate prices for coffee exports, a major downside is the loss of traceability. To improve this, Ethiopia and Tanzania have loosened their trading systems, also allowing for direct sales. An exception in the region is Uganda, where coffee is always marketed directly to buyers.

Supporting functions

Research & advise + Promotion & PR: There is no overall organic coffee organisation in Africa. Most coffee farmers rely on the national organic movements in their respective countries, as well as on (inter)national initiatives, sometimes in collaboration with national coffee institutes.

On an international level, most African coffee growing countries are a member of the International Coffee Organisation (ICO), except for Benin, Cabo Verde, Comoros, Congo, Equatorial Guinea, Guinea, Mozambique, Nigeria and Sao Tome and Principe. One of the strategic goals of ICO is to encourage member associations to develop a sustainable and market-oriented coffee sector, for which they encourage the development of the organic specialty sector.

The Inter African Coffee Organisation (IACO) is an intergovernmental organisation of 25 African coffee producing countries. IACO does not promote organic farming, instead it helps tackle common challenges facing the African coffee industry, including processing and marketing efforts. Another regional organisation is the African Fine Coffee Association (AFCA), a non-profit association representing coffee sectors in 11 member countries: Burundi, Cameroon, DR Congo, Ethiopia, Kenya, Malawi, Rwanda, South Africa, Tanzania, Uganda and Zambia. AFCA works on trade and market expansion, as well as product and quality enhancement. One of AFCA’s functions is to facilitate production, certification and market linkages for organic certified coffees.

On a national level, most countries count with national coffee institutes, and sometimes with national coffee research institutes. These organisations work with both mainstream and organic coffees, and often promote the productivity and sustainable development of the sector. Not all national coffee institutes provide the same support. Support for organic coffee production in Kenya is small, while farmers in Tanzania and Uganda are better supported. The Tanzanian Coffee Research Institute has supported coffee cooperatives with new coffees trees that have a genetic resistance to common pests, helping to avoid the use of synthetical fertilisers and pesticides. In addition, on a more local level, there are cooperatives that support their members with capacity building in good agronomical practices. In Uganda, the Ankole Coffee Producers Cooperative Union ACPCU, with its 8,200 members, focuses on and supports the production of fair trade and organic specialty coffee (Fine Robusta).

Certification, ICS and PGS: Africa has an estimated 450 ICS certified groups[87], of which many produce coffee. Farmer groups may also decide to join PGS, which ensures uniform procedures and specific criteria, allowing these groups to sell organic coffee to the domestic and regional markets. For exports to international (niche) markets, coffee should be certified by a third party which is often a bottleneck for coffee

Advocacy: Many development agencies and donors advocate and support the adoption of organic coffee farming. For instance, the Common Fund for Commodities has run projects promoting premium organic coffee production in DR Congo and Rwanda. There have also been private companies directly linked to producer’s organisations, to help boost the production of organic and high-quality coffees. An example is the work done by Dutch importer Trabocca in Ethiopia[88]
farmers. Certification bodies include Ecocert, CERES, IMO and Soil Association.

**Trade facilitation services:** The African Fine Coffees Conference & Exhibition, organised by AFCA, is the continent's largest coffee trade platform. It is an annual B2B event, which includes exhibitions, trainings, workshops, conferences, and cupping sessions. The event focuses on high-quality (specialty) coffees, including organic certified coffees. Another event organised by AFCA is the AFCA Specialty Coffee Expo, which is specifically aimed at driving domestic coffee consumption in Africa. This event is held annually and includes trainings, workshops and talks by industry experts. The Intra-African Trade Fair is another fair allowing coffee producing countries to promote their coffees within Africa. As most organic coffee is exported to international markets, several organic coffee associations and sectors also promote their products at international trade fairs, such as BIOFACH (Germany), World of Coffee (every year in a different city in Europe), the Specialty Coffee Expo (USA) or the Organic Tea & Coffee Expo (Dubai).

**Rules**

<table>
<thead>
<tr>
<th>Export Standards: As most organic coffee is exported to international markets, regulation is equivalent to these import market’s organic regulations.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Private standards and Regulations:</strong> In the coffee market, there are several more specific standards for smaller niche markets. Examples include Demeter and Bird Friendly, a minimum requirement for both standards is to be fully organic. Naturland (Germany), Bio Suisse (Switzerland), KRAV (Sweden) and Soil Association (United Kingdom) are national organic private standards. These standards often demand additional requirements, next to the requirements as set by the EU organic legislation. Kilimohai Organic is the East African organic label.</td>
</tr>
</tbody>
</table>

**Conclusions**

East Africa is the leading producing region of organic coffee. Total supply of organic coffees from Africa is, however, limited. For smallholder farmers the high costs, traceability issues, and highly skilled farming practices are challenges to obtain organic certification. Most smallholders rely on the national organic movements in their country for organic support, as well as a range of (inter)national initiatives, organisations and companies that help boost organic coffee farming.

Exporting countries which are able to supply consistent supplies of high-quality coffees with organic certification find an attractive niche market in mainly the USA and Europe. The current limited availability of African organic specialty coffees makes these coffees highly valued in international markets. However, although there is a growing international market interest in organic specialty coffees, it is important to verify market demand and examine if organic production is cost-beneficial, given that there has been a general disbalance in the production and sales volumes of certified coffees. Domestic and regional demand for organic coffees remains very small.

In general, the current focus of coffee institutes on increasing productivity poses challenges to the development of the organic coffee sector in different African countries. Thus, although the support of (inter)national organisations and companies has helped to develop the organic coffee sector in
Africa, a continued effort to preserve and further develop the untapped potential of the sector could provide the continent with an interesting proposition.

3.3. Tropical fruits

Overview and development
Tropical fruits such as mangoes, pineapples, bananas and avocados are a major product group within the African organic sector. 23 of the 54 African countries have reported about tropical fruit production in their country. These 23 countries are located mostly in Western and Eastern Africa. On a global scale, African organic tropical fruit production is important as well. Africa accounts for around 18% of global organic land for tropical fruit production.

The continent of Africa only has larger shares in global organic land for coffee, cocoa and olives. For the EU, Africa’s largest trade partner, tropical fruits are the main product group in total organic imports. The EU does not have the climatic conditions to produce tropical fruits and is dependent on imports to satisfy consumer needs. In 2019, 27% of total organic imports by the EU consisted of tropical fruits, nuts and spices. Moreover, imports of organic tropical fruits increased by 13% compared to 2018. Strong consumer interest in organic tropical fruits in Europe is driving this growth in imports. In 2019, organic tropical fruit imports in terms of value represented around 9% of total tropical fruit imports by the EU. This is a very high figure considering that retail sales of organic products (€ 97 billion) only have a 0.9% share in total European food and beverage retail sales (€ 1,129 billion).

Preservation of tropical fruits offers several opportunities for value addition in Africa. Drying, juice manufacturing and potentially freezing can reduce food waste, add value to waste streams such as low-grade fruits and enables producers to diversify their markets. Burkina Faso and Togo are among the leading African processors of tropical fruits.

Table: Number of suppliers of processed tropical fruit in selected African countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Suppliers of dried tropical fruit</th>
<th>Suppliers of tropical fruit juices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burkina Faso</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Madagascar</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Togo</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Uganda</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Ghana</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Although not listed in above table, Benin is a juice manufacturing country. An estimated 1% of Benin’s total pineapple production of 345 thousand tonnes is exported as organic pineapple juice to Europe. The tropical fruits sector is not organised into strong national organisations.

Tropical fruits production

*Infographic of the tropical fruits production*

Certified organic land in ha:

40,226

Tropical fruits:

Mango, pineapple, banana, avocados, papayas, passion fruit

Number of organic tropical fruit producers93:
- Benin: 100
- Madagascar: 5,000
- Morocco: 100
- Tanzania: 34

Alphabetical list of African countries where tropical fruits are produced:
- Benin
- Burkina Faso
- Burundi
- Cameroon
- Comoros
- Cote d’Ivoire
- Ghana
- Guinea-Bissau
- Kenya
- Madagascar
- Mali
- Morocco
- Mozambique
- Nigeria
- Reunion
- Rwanda
- Senegal
- South Africa
- Sudan
- Tanzania
- Togo
- Uganda
- Zambia

Table: Organic tropical fruit production in Africa (raw material)

<table>
<thead>
<tr>
<th>Countries</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value (CIF in €)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benin</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*93 ProFound survey, 2020*
## MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

<table>
<thead>
<tr>
<th>Country</th>
<th>A</th>
<th>B</th>
<th>D</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burkina Faso</td>
<td>10,213</td>
<td>49,346</td>
<td>81 million EUR</td>
<td>Mangoes comprise all organic production; Assumption: € 1.65 /kg</td>
</tr>
<tr>
<td>Kenya</td>
<td>8,437</td>
<td>5,789</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tanzania</td>
<td>6,063</td>
<td>32,602</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Madagascar</td>
<td>3,002</td>
<td>13,911</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uganda</td>
<td>2,072</td>
<td>138</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>1,943</td>
<td>8,095</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senegal</td>
<td>1,734</td>
<td>6,969</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ghana</td>
<td>1,173</td>
<td>15,161</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comoros</td>
<td>1,123</td>
<td>993</td>
<td></td>
<td>Only avocados</td>
</tr>
<tr>
<td>Zambia</td>
<td>785</td>
<td>n/a.</td>
<td></td>
<td>Only mangoes</td>
</tr>
<tr>
<td>Mali</td>
<td>709</td>
<td>n/a.</td>
<td></td>
<td>Only mangoes</td>
</tr>
<tr>
<td>Rwanda</td>
<td>525</td>
<td>129</td>
<td></td>
<td>Only pineapple</td>
</tr>
<tr>
<td>Togo</td>
<td>499</td>
<td>14,726</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cameroon</td>
<td>350</td>
<td>2,143</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reunion</td>
<td>337</td>
<td>n/a.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benin</td>
<td>268</td>
<td>11,453</td>
<td>1.7 mln EUR(^{94})</td>
<td>Volume only repr. pineapples; assuming farm-gate price of EUR 0.15/kg</td>
</tr>
<tr>
<td>Nigeria</td>
<td>n/a.</td>
<td>4,000</td>
<td>0.5 mln EUR</td>
<td></td>
</tr>
<tr>
<td>Burundi</td>
<td>164</td>
<td>169</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guinea-Bissau</td>
<td>59</td>
<td>n/a.</td>
<td></td>
<td>Only mangoes</td>
</tr>
<tr>
<td>Sudan</td>
<td>50</td>
<td>400</td>
<td>0.7 million EUR</td>
<td>Only mangoes; Assumption: € 1.65 /kg</td>
</tr>
<tr>
<td>South Africa</td>
<td>25</td>
<td>n/a.</td>
<td></td>
<td>Only mangoes</td>
</tr>
<tr>
<td>Morocco</td>
<td>n/a.</td>
<td>209(^{7})</td>
<td></td>
<td>Mostly avocados</td>
</tr>
</tbody>
</table>

*Value is estimated as a multiplication of the volume by the export price.

\(^{94}\) ProFound survey, 2020.

We differentiate between a) FiBL statistics b) other statistics such as ITC’s Market Price information portal [https://mpi.intracen.org/](https://mpi.intracen.org/) c) resource person estimates d) own estimates.

### Analysis

Tropical fruits are categorised as tropical fruits because they originate in regions with a tropical climate. It comes as no surprise that most tropical fruit production takes place in West, Central and East Africa where the climate is mostly tropical.

- In West Africa (Benin, Togo, Côte d’Ivoire, Ghana) there is a particularly large pineapple cluster, although Madagascar is the largest organic pineapple producer in terms of organic land area.
• Mangoes are produced all over Africa. The period April-September provides a window of opportunity for many African countries to supply international markets, as the major competitors Brazil and Peru cannot supply much during that period.

• Avocado production is concentrated in Kenya. Kenya is the world’s third largest avocado producer. Smallholders account for 70% of the avocado production.95

• Organic bananas, which account for 85% of EU organic tropical fruit imports, are mostly produced in Tanzania and Ghana. Côte d’Ivoire and Cameroon, two of Africa’s leading conventional banana producers, only reported a very small amount of organic banana production. According to Africa’s largest banana company Compagnie Fruitiere, challenges with fungi and parasites are the major barrier to further increasing organic banana production. Strong competition from Latin American countries in the banana market is another major barrier for many other African countries to export bananas.

• Madagascar is the main supplier of lychees to the EU. Lychees are considered an exotic tropical fruit and comprise a niche market within the European tropical fruit market.

• Kenya and possibly few other countries have a small production of passion fruit mainly targeting the European market.

The tropical fruits market

Infographic of the tropical fruits market

<table>
<thead>
<tr>
<th>Main products for export markets:</th>
<th>Pineapple, banana, mangos, avocados</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total volume of the exports:</td>
<td>n/a</td>
</tr>
<tr>
<td>Total value of the exports:</td>
<td>n/a</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Main target markets and their import volume:</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU: 43.6 thousand tonnes in 2019</td>
</tr>
<tr>
<td>USA: 3.3 tonnes in 2017 (only organic bananas)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Main target markets and their import value:</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU: n/a</td>
</tr>
<tr>
<td>USA: n/a</td>
</tr>
</tbody>
</table>

| Number of operators that are exporting tropical fruit from Africa: | n/a |

---

Supply chains' demand

The EU is the main market for African organic tropical fruits suppliers. Although Europe does not produce tropical fruits, European consumption of tropical fruits is very significant. Tropical fruits such as bananas and pineapple are common and have been widely available to consumers for many decades. These were also among the first tropical fruit markets to develop an organic segment. European markets for avocados, mangoes, passion fruit and many other tropical fruits have only developed more recently and some tropical fruits such as lychees and cashew apple are still considered as exotic niche products. Ready-to-eat tropical fruits are a relatively new trend that particularly offers opportunities for mangoes and avocados from countries with direct and frequent flight connections to Europe.

Cote d’Ivoire is the leading supplier of organic tropical fruits to Europe (20.3 thousand tonnes in 2019), followed by Ghana (18.3 thousand tonnes) and Burkina Faso (5.0 thousand tonnes).

Supply chains' supply

Organic tropical fruit production has been reported by 23 African countries and the available data suggests that Africa is a major producer of a variety of organic tropical fruits. Production takes place on both small-scale and large-scale farms. Small-scale farmers mostly supply to aggregators which export the products to international markets, while large-scale farmers often export themselves. As African tropical fruit producers have not organised themselves as a sector, producers often rely on organic sector associations in their respective countries to organise themselves.

European Commission, 2020. EU imports of organic agri-food products
The USA sources tropical fruits mostly from Latin America and demand for African organic tropical fruits is much lower than from Europe. To illustrate, Africa was not represented at all at the 2019 edition of the PMA Fresh Summit in Dallas, the largest trade fair for fresh fruits in the USA.

Tropical fruits play an important role in many local diets in Africa and due to concerns over excessive pesticide residues on fruits and vegetables, local demand for organic tropical fruits is quite significant.

As tropical fruits are highly perishable, logistics play an important role in establishing successful exports. For this reason, landlocked African countries have a large disadvantage in the fresh tropical fruits market. In countries with a large concentration of tropical fruit production, processing industries have been established for drying and manufacturing juices.

Market place

Reports by COLEACP on the pineapple markets in Togo and Benin provide some indication of the importance of different market channels for tropical fruits. The estimates for the different trade flows show that in Togo around 95% of fresh organic pineapples is exported to international markets (mainly Europe), 2% is exported to regional markets and 3% is sold locally. In the market for processed organic pineapples, a larger share of production is sold locally (16% of juices and 4% of dried pineapple). Exports account for 84% of juices and 96% of dried pineapple.

Although exports are clearly driving organic tropical fruit production, a survey by ProFound showed that tropical fruits are one of the main products on local organic markets in Africa. In Benin, processed tropical fruit (mainly pineapple) was estimated to account for 40% of local organic retails sales. In Tanzania, fresh tropical fruit (avocado, banana, pineapple and passion fruit) was estimated to account for 40% of local organic retails sales. In Nigeria, tropical fruits were estimated to account for 25% of local organic retails sales. In Kenya, fresh tropical fruits (mainly avocados) were estimated to account for 10% of local organic retails sales.

Supporting functions

**Organic Umbrella:** The tropical fruits sector is not organised into one strong organisation. One of the main organisations in the African tropical fruits sector is COLEACP, a not-for-profit association of companies and experts committed to sustainable agriculture. They work with both conventional & organic tropical fruits; their mission is to develop inclusive, sustainable trade in fruit & vegetables and food products, focusing on the African Caribbean Pacific (ACP) countries’ trade with one another and with the European Union.

Some sectors within the tropical fruits sector have organised themselves globally. For example, producing countries of conventional and organic avocados are organised in the World Avocado Organisation (WAO). In Africa, South Africa, Tanzania, Zimbabwe, Mozambique, Kenya and Morocco are all members of WAO.

**Advocacy:** Many development organisations active in Africa advocate the adoption of organic farming in the tropical fruits sector. For example, the World Bank funded the improvement of income and food security for smallholders in West and Central Africa through the export of organic tropical products and FairTrade.
**Trade facilitation services:** Africa does not host a trade fair specialised in tropical fruits. Nonetheless, there are several, mostly national, trade fairs for the agricultural sector for tropical fruit suppliers to meet buyers.

As Europe buys most of organic tropical fruit produced in Africa, many organic tropical fruit suppliers promote their products at a variety of international trade fairs including FruitLogistika in Berlin, Fruit Attraction in Madrid and BIOFACH in Nuremberg. Some African companies exhibit at the Dubai Organic and Natural Expo.

**Research and Advise:** Globally, the Tropical Fruit Congress is a leading event for the tropical fruit sector to exchange information on market trends, consumption, trade, but also scientific developments, technology, and methods of selling products that are increasingly in demand in global markets. However, the conference programme does not cover organic tropical fruit specifically. Moreover, speakers at this congress do not include any speaker from Africa.

### Rules

**Export standards:** As the EU is the most important market for organic tropical fruits, the export standards for organic tropical fruits are derived from the EU regulation for organic agriculture.

**Private standards and Regulations:** Most European buyers of tropical fruits, conventional and organic, require GLOBALG.A.P. certification.

In the Netherlands, a major importer of tropical fruits, the Sustainability Initiative Fruit and Vegetables (SIFAV) aims to increase sustainable sourcing by a group of leading companies in the fruits and vegetables sector. SIFAV members commit to buying fruits from suppliers that comply with selected social and environmental standards. The selected environmental standards are USDA organic, Leaf Marque, GLOBALG.A.P crops, EU organic, Bio Suisse.

### Conclusions

Tropical fruits are one of the most important sectors within the African organic sector. The total land area for tropical fruits of 40,226 ha represents only 2% of total organic land area. However, this land area represents 18% of global organic land for tropical fruit production. The 23 countries that have reported tropical fruit production are mostly located in West, Central and East Africa that have tropical climates. Their main products are pineapple, mango, banana and avocado.

For external support, the companies in the organic tropical fruits sector mostly have to refer to general organic sector organisations in their respective countries, as tropical fruits stakeholders have not organised themselves in a tropical fruits sector organisation. Besides, many donor funded programs have invested in smallholders and their supply of organic tropical fruits.

Strong consumer interest in organic tropical fruits in Europe is driving growth in imports. As a major source of tropical fruits for Europe, Africa’s tropical fruits production is increasing to meet this growing demand. Cote d’Ivoire, Ghana and Burkina Faso are leading the supply of organic tropical fruits from Africa to Europe.

Apart from the export markets, local markets play an important role in the African organic tropical fruits market. Concerns over excessive pesticide residues on fruits and vegetables stimulate local demand for organic tropical fruits.

Processing of organic tropical fruits adds value to the products and opens new markets internationally and...
locally. The preservation of tropical fruits can potentially reduce barriers to trade, as trade in preserved fruits poses less logistical challenges than trade in fresh fruits.

## 3.4. Shea

### Overview and development

Africa is the only continent where the shea tree (*Vitellaria paradoxa*) grows. The shea area stretches from Senegal in the West to Uganda in the East. Shea trees bear fruits consisting of a thin, nutritious pulp that surrounds a relatively large, oil-rich seed from which shea butter is mostly locally extracted. Extraction of shea butter involves several steps including crushing the nuts, drying the kernels and expelling or pressing the kernels. The resulting shea butter has added value with various applications in foods, cosmetics and health products.

Most shea trees are managed as part of parklands together with other farmed crops. They are part of traditional agroforestry management systems and protected in rural areas by local traditions and forestry policy. Shea collection often plays an important role in forest conservation by giving the trees an economic value that gives people an incentive to protect them. As most shea parklands are carefully managed, most people in these shea parklands do not consider these areas ‘wild’ despite their categorisation as ‘wild’ in statistics by FiBL.

Global collection of conventional and organic shea nuts is estimated at 800,000 tonnes. Commercial collection for export is concentrated in West Africa and most large-scale shea butter extraction facilities are located in Ghana and Burkina Faso.

Organic certified collection takes place mostly in Burkina Faso, Ghana, Mali, Cote d’Ivoire, Guinea, Benin and Uganda. The largest shea collector, Nigeria, did not report organic certified collection of shea. Nonetheless, it is estimated to be a significant supplier of organic shea. Organic certification of shea collection is completely driven by international demand from Europe and the USA. International manufacturers of chocolate and organic cosmetics are the main users of the organic certified shea. Increasing demand for chocolate and limited availability of cocoa butter lead to increasing demand for Cocoa Butter Equivalents (CBEs) such as shea butter to substitute cocoa butter.

Shea offers several opportunities for value addition. First of all, shea butter extraction provides an income to the many women who produce hand-crafted shea butter using traditional methods, besides the workers in large-scale extraction facilities using an industrial process. Secondly, many African companies use shea as an ingredient for foods and cosmetics and add value through manufacturing. While most of these companies target local and regional markets with conventional shea-based products, few of them export to international markets where demand for organic products is strong. Thirdly, both manufacturers in international markets and African manufacturers can use the organic certification to substantiate their marketing stories and brand their products.
Shea collection

Infographic of shea collection

Certified organic shea parklands in ha:

245,969

Shea products:

shea butter, stearin fraction, olein fraction

Number of shea collectors:

4 million conventional and organic shea collectors involved in the export value chain97

List of African countries where organic shea is collected (in no particular order):

- Nigeria
- Mali
- Burkina Faso
- Ghana
- Ivory Coast
- Benin
- Togo
- Guinea
- Uganda
- South Sudan
- Cameroon
- Chad

Table: Organic shea nut collection in Africa

<table>
<thead>
<tr>
<th>Country</th>
<th>Area (ha)</th>
<th>Volume (t)</th>
<th>Export value* (CIF in € million)</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burkina Faso</td>
<td>a) 198,257</td>
<td>a) 7,189</td>
<td>d) 14.4</td>
<td></td>
</tr>
<tr>
<td>Ghana</td>
<td>a) 35,834</td>
<td>a) 1,139</td>
<td>d) 2.3</td>
<td></td>
</tr>
<tr>
<td>Mali</td>
<td>a) 8,690</td>
<td>a) 3,025</td>
<td>d) 6.1</td>
<td></td>
</tr>
<tr>
<td>Benin</td>
<td>a) 722</td>
<td>a) 131</td>
<td>d) 0.3</td>
<td></td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
<td>a) 1,060</td>
<td>a) 100</td>
<td>d) 0.2</td>
<td></td>
</tr>
<tr>
<td>Guinea</td>
<td>a) 1,000</td>
<td>a) 50</td>
<td>d) 0.1</td>
<td></td>
</tr>
<tr>
<td>Uganda</td>
<td>a) 406</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

* Value is estimated as a multiplication of the volume by an export price of EUR 2 /kg
We differentiate between a) FiBL statistics b) other statistics c) resource person estimates d) own estimates.

97 FAO/GSA (2020). Shea value chain as key a pro-poor carbon-fixing engine in West Africa.
Analysis

According to FiBL data, organic shea nut collection amounts to 11,634 tonnes. Based on an organic area of 245,969 ha, an average of 21.4 shea trees per hectare and a yield of 3-4 kg of dry kernels, our own estimate is 19 thousand tonnes of organic shea nuts. The FiBL data presented above suggest a major gap between Burkina Faso and other shea producers. However, industry sources indicated that the difference in organic shea collection is probably not as big as the data suggest. Particularly collection of organic shea in Benin and Cote d’Ivoire appear to be higher than FiBL data suggests. In addition, Nigeria will soon become another supplier of organic shea with two companies in the process of certification.

Shea suppliers often obtain the organic certificate after having received a request for organic certified shea. This makes the organic shea market volatile, as shea suppliers often have a short-term objective, which is to comply with requirements of a specific buyer. Suppliers then assume that the shea from their collection areas is organic by default and put insufficient effort into long-term natural and organic resource management. When the shea parklands are shared with farmers who do not have any interest in organic farming, these farmers sometimes apply farming methods that are not compliant with international organic standards. In West Africa, particularly conventional cotton farmers in the area pose a major risk to organic shea nut collectors. Their farming inputs, such as pesticides, cross-contaminate shea nuts. Organic shea suppliers often find out about such contamination after analysis of their exported shea butter by their international clients. Subsequent rejection or devaluation of their products and loss of the organic certificate demotivates the affected companies. Moreover, other companies loose interest in certification after hearing such stories from their peers. This is a major bottleneck for the development of organic shea in Africa. Spraying of chemicals in buildings in the fight against malaria is another major threat to organic shea collectors. Collectors often store their shea in their houses, which then get sprayed and become contaminated.

The shea market

Infographic of the shea market

<table>
<thead>
<tr>
<th>Main products for export markets:</th>
<th>Shea butter, stearin fraction and olein fraction, shea cosmetics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main products for domestic and regional markets:</td>
<td>Shea cooking oil and shea cosmetics</td>
</tr>
<tr>
<td>Total volume of the exports:</td>
<td>19 thousand shea nut equivalent tonnes (based on assumption that all organic certified shea nuts are exported)</td>
</tr>
<tr>
<td>Total value of the exports:</td>
<td>38 million EUR (estimate based on EU average import price of EUR 2/kg)</td>
</tr>
<tr>
<td>Main target markets and their import volume:</td>
<td>EU: 8,000 shea nut equivalent tonnes (own estimate)</td>
</tr>
<tr>
<td></td>
<td>USA: 8,000 shea nut equivalent tonnes (own estimate)</td>
</tr>
<tr>
<td>Main target markets and their import value:</td>
<td>EU: 16 million EUR</td>
</tr>
</tbody>
</table>

FAO/GSA (2020). Shea value chain as key a pro-poor carbon-fixing engine in West Africa.
Supply chains' demand

Virtually all demand for organic shea products comes from the EU and the USA. In markets where shea is highly standardised, such as the market that uses shea butter as a Cocoa Butter Equivalent, the focus is mostly on price and organic certification is of less importance. However, within these markets, there is still a significant segment that prefers organic shea butter. In several other markets, such as markets for natural and organic cosmetics, a much larger share of the buyers require organic certification to support their marketing stories. Only when the organic version of an ingredient is very scarce will natural cosmetics manufacturers use the conventional version. As organic shea is already widely available, most natural cosmetics manufacturers require an organic certificate for shea.

Local demand in Africa for organic certified shea is absent, also as result of the perception of local consumers that the shea collected from parklands is ‘organic by default’.

The lack of demand for certified organic shea does not imply a lack of demand for organic shea. Within Africa, many consumers are for example looking for natural cosmetics. Shea butter is an important ingredient for many natural cosmetics and although these cosmetics usually do not contain certified organic ingredients, many consumers expect that shea in these cosmetics is ‘organic by default’.
### Supply chains' supply

Shea collection provides an income to millions of people. FAO and Global Shea Alliance (GSA) estimated the average gross income per women collector in Ghana at USD 75. Besides collecting shea nuts, many of the women add value to their product by processing the shea nuts into shea butter. In few cases, this handcrafted shea butter finds its way directly to the export market. However, most shea is processed by larger-scale processors that add value through extraction of shea butter and cleaning of the product.

Organic farming systems have been widely adopted by the export-oriented shea industry. For many shea suppliers, the organic certificate improves their access to international markets.

### Market place

Collectors of organic shea are organised in collector groups or cooperatives. The collector groups supply all of the organic shea to aggregators, which process and export the shea to international markets. The Savannah Fruits Company (SFC) is one of the leading players in the organic shea markets. SFC partners with over 15,000 women in Ghana producing handcrafted, organic and fair trade shea butter from 40 communities. Many of the cooperatives supply to large-scale organic processors and some cooperatives have their own processing centres.

### Supporting functions

**Sector organisation:** The Global Shea Alliance (GSA) is an influential organisation in the shea sector. Its membership extends beyond the African producer countries and includes processors and users in markets around the world. GSA does not actively promote organic certification. It focuses more on income generation for shea collectors and other players in the value chain and on shea tree conservation.

**Certification:** Ecocert is the main certifier of shea suppliers. Most shea exporters only obtain the organic certificate after they receive a request for such an organic certificate from a buyer. As shea is usually collected from shea parklands where all agricultural activities are 'organic by default', certification does not require a conversion period and is a relatively fast and easy process.

**Trade facilitation:** Organic shea suppliers promote their products at a variety of international trade fairs including BIOFACH in Nuremberg, Africa Cosmetics Exhibition, Professional Beauty Exhibition in South Africa, Beauty exhibition in New York and Dubai Organic and Natural Expo.

### Rules

Burkina Faso and Ghana, two of the major producers of organic certified shea, are classified as active Ecological Organic Agriculture countries and have upcoming organic policy and governments that promise support to the organic sector. Benin and Nigeria, two other major producers are classified as Infant Ecological Organic Agriculture countries without an organic policy and little government support. Finally, Ivory Coast is classified as a country with Nascent Awareness about organic agriculture, which lacks organic policy and government support.99

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Conclusions
The estimated collection of organic shea nuts in Africa amounts to 19 thousand tonnes. This represents around 2% of total shea collection. Almost the entire demand for organic certified shea nuts comes from international markets which use organic shea for organic foods, such as chocolate, and for organic cosmetics.

Burkina Faso, Ghana, Benin, Cote d'Ivoire and Nigeria are estimated to be the main suppliers of organic shea nuts. Their shea sectors are organised in the Global Shea Alliance which aims to develop a sustainable shea industry but does not focus on organic shea collection.

Stakeholders in the shea production in Africa have reported that the organic farming system is difficult to maintain in shea parklands. Shea collectors often share these parklands with local small-scale farmers who do not necessarily have the same interest in organic production systems as the shea collectors. When a farmer uses chemicals which are not allowed in organic farming, contamination of the shea nuts can occur. This risk demotivates shea suppliers to obtain or maintain organic certification and is a major bottleneck for development of the organic shea sector.

The export-oriented organic shea suppliers mostly go to trade fairs in international markets. Depending on their type of products (raw materials or final products) and target market (food or cosmetics), they participate in trade fairs such as BIOFACH in Nuremberg (food and cosmetics, raw materials and final products) or Beauty exhibition in New York (final cosmetics).

3.5. Conclusion on prioritisation and segmentation for future action
The drivers for growth of organic production and trade for the selected three value chains are international market demand combined with support through investments in the supply by mostly donor funded programs. The latter is the case for all three sectors.

Probably the best opportunities for these donor investments have been for the tropical fruits sector for which an additional driver plays a role, namely local market demand following food safety issues in these upcoming local African markets. Moreover, processing of organic tropical fruits offers value addition opportunities opening new markets. The preservation of tropical fruits can potentially reduce barriers to trade, as trade in preserved fruits poses less logistical challenges than trade in fresh fruits.
The shea sector represents a well-organised sector receiving support and standard setting through the Global Shea Alliance, although they are not directly supporting organic production. Actually, maintaining organic certification appears to be challenging due to the collective nature of the parkland collection areas of shea and the risk of contamination with pesticides.

Certification challenges are also present for coffee producers; apart from the high costs, traceability issues, and highly skilled farming practices are serious bottlenecks to obtain organic certification. It are often buyers / international market players that would like to have guaranteed supply of a certain organic certified coffee origin making serious (co-)investments in setting up the organic certified supply. Besides, and although it differs per origin, generally supply for organic coffee exceeds demand, making an investment in organic certification questionable.

Regarding the already existing certification challenges, the effect of the new EU regulation on Group Certification on African exports, which is discussed in the following Chapter, will pose even more challenges on the producers and exporters and will come at an even higher cost.

When looking at local market development and which value chains are best positioned, it is first of all fresh produce, MAPs and honey followed on the medium term by processed produce (food and cosmetics). Probably organic meat also offers opportunities, but it is difficult to substantiate this due to limited examples. However, also for value chains for local market development the regulatory framework and certification of smallholder groups remains an important challenge.
4. Understanding the macro-economic framework

This section discusses two existing issues at macro-economic level that are important to consider when working on trade promotion of organic produce from Africa.

4.1. Effect of the new EU regulation on Group Certification on African exports

Importance of group certification

Group certification based on internal control systems (ICS) are very common around the world particularly in exporting developing countries. FiBL estimates that worldwide, there are about 5,900 groups with 2.6 million farmers (80% of organic farmers) relying on group certification. They cover 4.5 million ha in 58 countries. These producers are recognised as organic due to group certification, a system in which groups of farmers implement an ICS and are certified by a third-party certification body. The approach of using ICS based group certification was pioneered by IFOAM – Organics International and Fairtrade International over the past twenty years and has been adopted by the entire organic sector, and has been further developed by other voluntary sustainability certification programs such as Rainforest Alliance, Fairtrade International or GLOBALG.A.P.. ISEAL developed recommendations for their members (referring to it as Internal Management System: IMS).

The total number of ICS participants is estimated at 5.6 million. Group certification is the only way that smallholder farmers in low-income countries can afford certification financially and with which the administrative burden is manageable. That is how they access certified international markets. Besides reducing certification costs and complexity it also provides other important benefits such as common learning, cooperation and use of synergies in input supply, crop management and marketing.

Cocoa and coffee are particularly popular products originating from ICS, but also tea, tropical fruits, cotton, MAP, nuts, soy and sugar are commonly produced by farmers that are organised in groups.

FiBL has published a (SECO-supported) study\(^\text{100}\) that examines the current scale and scope of group certification by region and country. It identifies the strengths, success factors and challenges of ICS.

ICS in Africa

In Africa, there are about 450 groups with 850,000 producers cultivating 1,300,000 ha, which means that the land per producer is very small. Groups can be very large and groups with more than 10,000 members are not uncommon. Among the top ten countries in organic ICS are:

- Uganda (30- 40 groups, 200,000 producers, 250,000 ha),
- Ethiopia (30-40 groups, 190,000 producers, 170,000 ha),
- Tanzania (40-50 groups, 190,000 producers, 260,000 ha),
- Kenya (10-20 groups, 40,000 producers, 140,000 ha),
- Cote d'Ivoire (10-20 groups, 30,000 producers, 50,000 ha).

In Southern and North Africa there are also small groups e.g. of 20 farmers.

ICS typology

IFOAM\textsuperscript{101} and FiBL differentiate between:

\begin{itemize}
  \item a. self-organised farmer groups such as cooperatives, farmers associations and federations of cooperatives; and
  \item b. processor and trader managed groups where the buyer has a contract with farmers and manages certification.
\end{itemize}

Both types are common in Africa. IFOAM estimates that slightly more than half of all organic farmers under group certification are in organised farmers groups (type a), but that only a quite limited range of organic products (e.g. coffee and cocoa) and origins come from this type of ICS. Many important organic commodities are almost entirely sourced from processor/exporter managed producer groups (vegetable oils, sugar, cotton, rice etc.). Compared to other regions in the world, African ICS are particularly big and have many members, but the number of groups is not very high.

In the FiBL study, apart from the benefits, various stakeholders highlighted challenges and a need for more guidance or stronger criteria in some areas in order to ensure consistent application of the requirements. IFOAM also sees ICS-weaknesses that should be addressed. FiBL recommends maximum sizes of the groups, definition of farm sizes, the provision of digital tools, training to ICS as well as harmonising audit practices between certification bodies.

ICS and the present and new EU organic regulation

In the present EU law on organic agriculture (N° 834/2007) group certification is not mentioned. Present rules are set in the \textit{Guidelines for the Evaluation of the Equivalence of Organic Producer Group Certification Schemes Applied in Developing Countries}. These guidelines are part of the EU’s guidelines for imports of organic products and they are the normative basis for EU certification of organic producer groups worldwide. That changes with the new EU organic regulation (N° 2018/848) that comes into force from January 2021 (or if postponed one year later).

The most relevant section in the new EU organic regulation for group certification is \textit{article 36}, which outlines basic principles that are similar to the previous guidelines (e.g. common marketing and geographic proximity of members). However, group certification is now explicitly restricted to groups of operators, which have a legal entity with members with a “maximum of 5 hectares landholding (15 hectares in case of grassland) or an annual turnover of less than EUR 25,000 (or total output from organic of less than EUR 15,000 or certification costs that are more than 2% of turnover)”. There are also important references to group certification in sections (85), (87), (116), (117), Art. 35 (1)(b), Art. 38 (1)(d) and (4) (d) and (9) (d) and Annex VI.

The requirements in the new regulation are definite. What still needs to be decided is defined in Art. 36 (3,4) and Art. 38 (9), which gives the Commission the mandate to:

\begin{itemize}
  \item Add provisions regarding the responsibilities of members in the groups, criteria to determine geographic proximity and how the internal control system shall be set - up and function;
  \item Define specific rules concerning the composition and dimensions of a group of operators, the record keeping and traceability systems and the exchange of information between groups, competent authorities and certification bodies;
  \item Lay down specific criteria and conditions for the external control of specific categories of operators, including the minimum number of members to be controlled externally.
\end{itemize}

The task of developing ways of implementing the regulation, including the rules and criteria for group certification has been delegated to the European Commission (§87, §116 and §117) and these details are presently under discussion.

Risks of the new EU regulation and proposals

The application of the new rules may have severe consequences for the ICS groups around the world but particularly for Africa since - as mentioned above - the groups are particularly big in terms of participants. It is here, where legal registrations are difficult. Hence the new rules create massive costs, administrative burdens and they may even lower the overall quality of management and control both of the ICS and of the external control.

IFOAM developed the following examples of what the proposed rules would mean:

- An existing organic cooperative of 3,000 members would have to split in 6 groups of 500 members and create 6 new legal entities, each one with its own Internal Management and Control System.
- In an existing cooperative of 1,300 members, of which 700 are non-organic and 600 are organic, the cooperative would have to create 2 additional new legal organic entities (cooperatives), each one with its own Internal Management and Control System.
- An exporter with 2,000 affiliated farmers would need to set up 4 new separate legal group entities with their own accounting and Internal management and control system, each group certified separately.

This means that the proposals would have a substantial negative impact on millions of small-farmers all around the world. It will also create unnecessary costs to cooperatives and federations of cooperatives. The potential disruption of the supply of key ingredients to organic processing companies in the EU may impact operations and their competitiveness. Since the new EU requirements would substantially differ from those of other organic regulations and important voluntary certification schemes (e.g. Fairtrade, Rainforest Alliance), implementation would be very confusing for the affected groups and certification bodies.

As a consequence, IFOAM Organics International and IFOAM EU have developed positions and are trying to influence the EU Commission to mitigate the consequences.

IFOAM flags the issues that:

- There were intentions to limit group size to 500 farms per group, with the obligation of splitting bigger groups and creating a new legal entity and a separate internal control system for each new group. In the meantime, the intended limited group size is 2000.;
- Processor/Exporter managed producer groups would need to become separate group entities; and
- Federations of cooperatives could not be certified, as the federation’s members would be cooperatives, not farms.

The position of IFOAM Organics International is:

- that cooperatives, federations of cooperatives, and processors/exporters with affiliated farms need to be recognised as certifiable legal group entities. A certified legal group entity, e.g. a cooperative, should be permitted to create a sub-group of its registered members for organic certification without the need to form a new separate legal entity only for the organic members;
- that if a maximum number of farmers per group is decided, then this should only be for the purpose of certification. It should be possible that different groups of 500 use the same Internal Management and Control System, and that they are all under the same legal entity. Furthermore, the currently proposed cap of 2000 members should be further analysed and reconsidered;
- that “medium farms” should still be allowed as members of the ICS, provided that they be externally inspected every year. Farms above a second threshold should be required to have their own separate certificate, for transparency and accountability reasons;
MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

- to leave the requirement of geographical proximity and similar production in its current general phrasing and not to develop more prescriptive rules at this stage;
- to lower the incentives for building very large groups by introducing a “floor re-inspection rate” of at least 1.4% for the normal risk category. This instead of setting a defined cap on the total size or dimension of the group;
- to encourage a wider harmonisation process between leading CBs;
- that group certification becomes a separate scope of accreditation;
- To continue the current square root approach for re-inspection and add an additional minimum floor;
- that more harmonisation is needed between leading group certifiers on sanctions.

4.2. Effect of the AfCFTA on organic trade

The African Continental Free Trade Area (AfCFTA) came into force in Africa on 30 May 2019102 with 24 countries, meanwhile 30 countries having ratified the AfCFTA Agreement103.

According to UNCTAD’s policy brief no. 44, the AfCFTA can unlock tremendous potential in Africa by boosting trade and a vibrant and resilient African economic space. Besides more regional integration and intra-African trade, it can also lead to more structural transformation in African countries, by formulating and implementing appropriate economic development policies linked to AfCFTA.

The policy paper mentions specifically ‘unexploited opportunities… to be found particularly in agriculture, including sustainable agriculture such as organic products’. Most of the countries are still net food importers, and there is still very limited value addition to allow for import substitution.

During the 1st International Conference on Agroecology – Transforming Agriculture & Food Systems in Africa, which was held in Nairobi in June 2019, Malick Kane of UNCTAD explained Africa’s potential in this respect. The fact that formal trade figures on organic agriculture in Africa are extremely limited, illustrates the still relatively immature status of the sector, despite a long tradition of the organic movement across the continent.

Kane explains that Participatory Guarantee Systems (PGS) may create new dynamics for African markets, to cater for the growing demand of the rising African middle class. He points to the growing share of retail supermarket chains and emerging opportunities with e-commerce platforms (and direct sales with home deliveries), and opportunities with credit systems and drone operated crop health management systems.

Yet, there are still multiple challenges in benchmarking certification standards and food safety issues; in awareness and capacities; and in support to higher value chains (such as tailored innovative

102 https://au.int/en/pressreleases/20190429/afcfta-agreement-secures-minimum-threshold-22-ratification-sierra-leone-
and
103 https://www.tralac.org/resources/infographic/13795-status-of-afcfta-ratification.html#:&text=The%2030%20countries%20that%20have,%2C%20Sierra%20Leone%2C%20Saharawi%20Republic%2C
solutions that are being initiated by start-ups regarding quality, plant and product health & safety, traceability/block chain technologies, trade promotion and marketing).

In addition, the AfCFTA has large economic potential, which is combined with the strong growth of the African middle class which promotes the development of organic consumption and trade. According to UNCTAD’s research paper no. 14, the complete removal of applied tariffs could lead to an overall gain of about USD 3.6 billion per year, while reducing the trade distorting effect of non-tariffs measures could lead to overall gains of USD 20 billion.

Although not yet clearly defined, AfCFTA can also play a major role in effectuating sustainability changes in the production and marketing of agricultural produce, in which organic production can be instrumental as a climate-smart approach. IFOAM and GIZ may initiate a dialogue with a designated taskforce of AfCFTA, and offer support in policies and strategies to develop organic value chains in the regions as described in this report.
5. Activating untapped potentials: Strategic product-market development

As per the objective of this report and its underlying ToR, Chapters 2-4 have analysed production and markets, value chain potentials and the macro-economic framework.

In Chapter 5 we will translate this now into describing how potentials can be unlocked and developed through a coherent and comprehensive approach to product-market development, in particular by enabling entrepreneurs. Obviously, this also implies aligning relevant stakeholders to that effect.

In Chapters 6 and 7, this will be translated into strategies and recommendations regarding the potential of trade promotion platforms and innovative lab-type trade fairs.

5.1. Benchmarking and formalising organic production for markets; complying with national and international market standards

What becomes clear from the reports and interviews, is that the enabling environment for trading organic products in Africa has been, and still is, more informal than formal. More formal initiatives (often -starting with- projects/programmes or private investors) have been more successful in scaling up and sales, in particular when it comes to international markets like the EU or the USA, involving international companies. These most often deal with more commodity type of products like coffee, tea, cocoa, cotton and sugar. Some fruits and vegetables, medicinal and aromatic plants (MAPs), and honey have also done well.

Chapter 2 concluded that organic export figures of all countries by far exceed domestic consumption. This is not to say that consumption is not there or that consumers are not interested, the figures are
simply not there. Many consumer surveys indicate a good demand for organic food, in particular when linked to food safety and nutritional values. Nutrition and food safety is increasingly becoming more of a concern and action at national/government levels. For example, pricing policies will need to ensure safe food availability to all consumers. Also internationally, there is a growing demand for organic products from Africa that are not grown in home countries, or are not available off-season.

This once again makes clear that unlocking African trade potentials requires certain levels of transparency and ‘rules of the game’ which are unambiguously understood and agreed by the actors involved. National Organic Standards and Participatory Guarantee Systems (PGS) can offer good solutions on the supply side and for domestic markets. Cases of e.g. South Africa, Uganda, Burkina Faso, Ethiopia and Namibia show how this can become successful when more embedded and articulated at national level and in government policy as a regulatory framework. This is an important driver to gain market credibility and acceptance.

The same applies to the use of terms, and collaboration between groups representing various agricultural systems: Ecological Organic Agriculture (EOA), Agroecology, Agrobiodiversity, Regenerative Agriculture, Sustainable Agriculture, ‘climate-smart’, ‘landscaping approach’. Organic could well be a common denominator, if clearly understood and agreed; common understanding ultimately determines the success of organic production and trade, even if production systems may vary. The African Union uses EOA to bring together organic and Agroecology approaches.

When the ambitions go more regional or to export markets like in the EU, USA or Asia, benchmarking with international standards will be critical: GACP/GlobalG.A.P., various Organic Standards, more strict food safety rules (e.g. MRLs), traceability, climate-smart, nowadays emphasis on circular economy, CO2 footprint, soils & water, production-consumption seasonal calendars with nutritional values, etc.

Compliance means being able to face regional and international competition (also vis-à-vis competing imports), and hence it means that National Organic Standards and PGS schemes require proper benchmarking with international rules from the start. While in North Africa, the European model of guarantee system with third party certification prevails, development of local markets in Sub Saharan Africa relies mostly on PGS development. While stakeholders struggle with the complex PGS requirements and many PGS are not fully functional assessed against the IFOAM criteria, PGS is in practice very flexible and adaptive to local needs. However, it needs some level of benchmarking and harmonisation in order to be recognised in markets beyond the local context.

5.2. Product innovation and value addition: linking with buyers and consumers

With respect to untapped potentials and regional market build-up, one should think in particular of products that matter to local populations (in particular also in urban context), with innovation and value-adding potential, such as processed foods (dried and otherwise), sweet potato, avocado, mango, tree tomato and persimmon, beans & pulses, honey & bees wax, ingredients for cosmetics and health(y) foods (think of e.g. shea, baobab, gums, cosmetic oils such as macadamia, herbal teas such as with hibiscus and moringa, medicinal & aromatic plants), but also meat and meat products.

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<tr>
<th>Markets</th>
<th>Products</th>
<th>Market drivers</th>
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<td>Local + regional markets</td>
<td>Products that matter to local populations</td>
<td>Food safety</td>
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<td>Processed/value-added products</td>
<td>Growing number of middle-income consumers</td>
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<td>International markets</td>
<td>Products/Ingredients that cannot be sourced locally</td>
<td>Growing demand for organic products</td>
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<td>New ingredients + interest in Africa</td>
<td>Product innovations</td>
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Many of these products do not (yet) appear in trade statistics. Yet, for many of these, local and regional markets may offer better prospects as they are often considered too expensive for other international markets, because of organisational (incl. certification and financing) and logistical challenges. In addition, more dynamics and value-adding potential may be found in local/regional markets. Cluster-approaches covering several countries must be considered, in particular when linked to fair trading principles and standards (including organic agriculture), traceability, food safety and nutritional values. In this respect, it will be important to identify countries and areas with good potential for organic production, as well as countries and regions with good market opportunities regarding suggested product segments.

It is important to note, however, that one of the conclusions of Chapter 3 is that, for the selected three value chains, the growth of their organic production and trade is largely driven by international market demand partially stimulated by donor investments. An additional driver for the tropical fruits sector is local market demand following food safety issues in upcoming African middleclass market segments. Moreover, processing of organic tropical fruits offers value addition opportunities and opens up new (regional and international) markets. The preservation of tropical fruits can potentially reduce barriers to trade, as trade in preserved fruits poses less logistical challenges than trade in fresh fruits. In that sense, it can also prevent food losses.

Still, most countries, except for e.g. South Africa and some North African countries, predominantly have a strategy of exporting primary produce and show limited processing and value addition in the country. Initiatives such as the Global Shea Alliance may stimulate regional clustering and collaboration (also: standard-setting), thus reaching critical scale for innovation and processing. Similar to smallholder coffee producers, there are still challenges for organic shea certification, in particular now also with the new EU regulation, which are still to be overcome (Chapters 3 and 4). Fresh produce, MAPs, honey and (processed) health/cosmetic ingredients also offer good potential for clustered approaches and scaling (providing regulatory frameworks and certification issues are solved).

5.3. Enabling environment: regulatory frameworks (legislation & policies), public-private partnerships, and organic networks

As elaborated in Section 4.2, the African Continental Free Trade Area (AfCFTA) can unlock tremendous potential in Africa by boosting trade and a vibrant and resilient African economic space. Besides more regional integration and intra-African trade, it can also lead to more structural transformation in African countries, by formulating and implementing appropriate economic development policies linked to AfCFTA. One of the ‘unexploited opportunities’ mentioned specifically is ‘sustainable agriculture such as organic products’. Most of the countries are still net food importers, and there is still very limited value addition to allow for import substitution.

Yet, there are still multiple challenges in benchmarking (organic) certification standards and food safety issues; in awareness and capacities; and in support to value-adding supply chains. For example, innovative solutions that are being initiated by start-ups regarding quality, plant and product health & safety, traceability/block chain technologies, trade promotion and marketing.

The AfCFTA has a large economic potential, which, combined with the strong growth of the African middle class, can be instrumental to promote the development of organic consumption and trade. Although not yet clearly defined, AfCFTA can play a major role in effectuating sustainability changes in the production and trading of agricultural products, in which organic production systems (EOA and AO) can be promoted as a climate-smart approach.

IFOAM and GIZ may well initiate a dialogue with a designated taskforce of AfCFTA, and offer support in the designing of policies and strategies to develop organic value chains in the regions and countries, according to the local potentials and market demand as described in this report. Said taskforce ideally includes representatives of the African Organic Network (AfrOnet), the Initiative on Ecological Organic Agriculture (Biovision Africa Trust and PELUM), and the BMZ/GIZ supported Knowledge Hubs for Organic Agriculture in Africa.
5.4. Market build-up: accelerating private sector initiative, organic trade facilitation and promotion

Notable in most of the analyses of organic production and trade in previous chapters has been the relative absence of the African private sector in many of the policies and strategies that have been designed and implemented over the years. Of course, organic farmers are part of the organic private sector, and there are good case examples of commodity exports and such social enterprises as Sekem in Egypt, but what about the retail sector? There are almost no figures available, nor reports on organic segmentation in markets and retail chains. In Section 4.2, Malick Kane points to the rising African middle class and growing share of retail supermarket chains; he sees emerging opportunities with e-commerce platforms (and direct sales with home deliveries).

The private sector is key to unlocking the potential of the organic sector, helped by consumer pressure and demand for safe and sound foods. This matches well with concepts of ecological organic agriculture, agroecology, landscaping approach with diverse production.

There are some (national) trade fairs in the region, however, the outcomes of these events are not reported or monitored. In addition, and as far as could be established for fact, there are not many functional trade platforms for the organic private sector. There are two relatively new platforms, both initiated by South African entrepreneurs:

- **CANI**: On-line conference on African Natural ingredients (took place in November 2020, and are planning a new physical + on-line event for September 2021 together with IATF, the largest African continent-wide trade fair covering multiple sectors);
- **Organic & Natural Expo Africa** (physical trade fair planned for May 2020, postponed to September 2021 due to COVID-19).

Both entrepreneurs refer to ‘organic’ as ‘green products’, not necessarily organic certified. The registered participants for the Organic & Natural Expo (around 1,000 so far) are mostly SME’s for which obtaining organic certification is not (yet) feasible.

These two examples confirm the important role of private sector initiatives as drivers for developing the organic sector further and to help set the stage for national policies and priorities. This would need to include regulatory frameworks regarding products and markets, diversification of products and investments in value addition/processing (5.1, 5.2, 5.3).

Ways to do so are organizing and/or supporting trade fair events with a design that it addresses product-market matches, sector innovations and elements such as:

- Innovations in organic crop production to scale up production to get to volume and improved quality (e.g. drone operated soil and crop health management systems);
- Investment opportunities and credit systems to facilitate more efficient trade flows;
- Collective marketing strategies with prioritised product-market strategies (local, regional);
- Conference program with policy dialogue sessions on harmonisation and PGS;
- Involvement of retail and consumer platforms, including cooking shows and demonstrations around the theme ‘healthy food & nutrition’;
- (Digital) trade promotion platforms to collect and re-direct trade and consumer interests (food safety, nutritional values);
- Etc.

If and when properly driven by the private sector and consumer panels, with the right public financial support (see also Section 5.3), trade fairs will offer many opportunities for youth employment (on which there are currently many support programmes), engaging with digital technologies for:
production systems (soil & water), traceability, food-safety, trade promotion platforms (with production-consumption seasonal calendars), certification, pricing and payment systems.
6. Strategic pathways forward: linking actors-products-markets

The above analyses confirmed the market opportunities and the existing not satisfied demands for organic products from Africa in Africa and outside. The overall goal to boost organic trade in Africa is consensus among stakeholders that participated in this study. They welcome action to facilitate, catalyse and accelerate growing and sustainable trade activities on local, national and international levels. As a consequence, the main question is: How can this goal be achieved most effectively?

This chapter therefore builds on the preceding parts of the report, defining potential strategic pathways to achieve the goal.

The next sections describe four strategic pathways. They are related and ideally work in conjunction and with synergies (through strategic partnerships) to achieve sector development and trade, involving various perspectives. These strategic pathways are:

- Strategic Intervention 1: Market development and Trade facilitation
- Strategic Intervention 2: Capacity building of actors
- Strategic Intervention 3: Information systems building
- Strategic Intervention 4: Creating an enabling environment

6.1. Strategic Intervention 1: Market development and Trade facilitation

Summary

- Acceleration of private sector initiatives, public private and private only partnerships, organic producer organisation and networking, conducive framework conditions and legislation;
- Market build-up: organic trade facilitation and promotion through (digital) platforms, collective marketing strategies and innovative Lab-type trade fairs;
- Investment opportunities for organic sector trade development & promotion.

Narrative

While the value chain approaches in this report more directly point to the main drivers for market uptake, the country analyses demonstrate the enormous diversity of the continent, and the local structures and capacities to further build the organic market in the region. Following from this, the two main drivers for boosting Africa’s organic trade potentials are:

1. International market demand: historically, international demand has been the main driver for organic products, driven by health and environmental concerns. This demand stems mostly from the EU and the USA, two markets that are still growing, while expected new growth markets are the Middle East and Asia.

2. Local/regional market demand: despite many efforts, local and regional organic markets are still small (even if there are also unregistered informal markets). When looking at the potentials (in particular driven by growing concerns of food safety, health and growing middle class), this is where in the mid- to longer term biggest growth can be achieved.

Assumptions and preconditions for success

Apparent bottlenecks:

- Limited awareness of organic agriculture along the value chain from producer to consumer and its values in national, regional and continental trade;
Complicated, unclear or unavailable organic frameworks while clear and well understandable frameworks are needed to build a strong organic market with clear values;

Reality of smallholder farmers and the difficulty of addressing previous points, and role of aggregators and middlemen in properly linking farmers to markets and vice versa.

To tackle these bottlenecks amongst others the following activities are suggested:

- PGS as a stepping-stone for benchmarking and compliance with national and international standards (for exports to other regions);
- Awareness raising of organic agriculture at different levels is needed with clear involvement of the private sector; such as marketing at consumer level i.e. through consumer panels and promotion/branding initiatives at retail level and capacity building at producer level through producer associations.
- Short and longer term public and private investment in defined opportunities in terms of products, sectors and countries including trade promotion activities.

**Development prospects for 5 - 10 years**

Chapter 5 on ‘activating untapped potentials’ referred to the following core development aspects of this strategic intervention on product-market development:

1. Benchmarking of National Organic Standards and PGS schemes with international standards; working towards complying with national and international market standards;
2. Product innovation and value addition: linking with buyers and consumers;
3. Creating an enabling environment: regulatory frameworks (legislation & policies), public-private partnerships, and organic networks;
4. Market build-up: accelerating private sector initiative, organic trade facilitation and promotion;
5. Financial strategies for organic sector trade development & promotion; investments and potential returns on investments in the sector.

The table at the beginning of [Chapter 7](#) summarises a range of potential activities, actors and mechanisms to activate the above development prospects.

While prospects for ‘enabling environment’ will be discussed in paragraph 6.4, the next section will highlight more specific the aspects of market build-up and trade promotion mechanisms, and accompanying financing implications.

**Investment and sustainability strategy (business model)**

First of all, the private sector is key to unlocking the potential of the organic sector, helped by consumer pressure and demand for safe and sound foods (which matches well with concepts of ecological organic agriculture, agroecology, landscaping approach with diverse production). Paragraph 4.2 pointed to the rising African middle class and growing share of retail supermarket chains, and the emerging opportunities with e-commerce platforms (and direct sales with home deliveries). The following potentials for investment by private sector were identified:

- Products that matter to African populations, with innovation and value-adding potential: processed foods (dried and otherwise), sweet potato, avocado, mango, tree tomato and persimmon, beans & pulses, honey & bees wax, ingredients for cosmetics and health(y) foods (think of e.g. shea, baobab, gums, cosmetic oils such as macadamia, herbal teas such as with hibiscus and moringa, medicinal & aromatic plants). Investments are needed for product development, R&D, marketing etc.
• Growth of organic production and trade was largely driven by international market demand, with investments in the supply through (often/mostly) donor-funded programmes. A potential driver for the fresh fruits and vegetable sector including tropical fruits on the short-term is local market demand following food safety issues in upcoming African middleclass market segments in countries such as Ethiopia, Kenya and Ghana. Besides, processing of organic tropical fruits offers value addition opportunities and opens up new markets; preservation of tropical fruits can potentially reduce barriers to trade, as trade in preserved fruits poses less logistical challenges than trade in fresh fruits. Moreover, it can also prevent food losses. Investments are needed for supply chain management, cold chains and processing equipment.

• Other investment opportunities in products/sectors/countries for developing local/regional markets are:
  • Final organic food/health/cosmetic products for more advanced markets such as South Africa and perhaps North Africa (short-term);
  • Processed MAPs for upcoming markets such as Ethiopia, Kenya, Ghana etc. (short/medium-term);
  • Organic meat and other livestock products for upcoming markets (short/medium-term);
  • Final and more luxury consumer products such as final food, health and cosmetic products (longer-term).

Secondly, additional public investments by national governments and donor funded programs will be needed to support a clustered approach for which it is important to more clearly identify countries and areas with good potential for organic production, and countries and regions with good market opportunities (i.e. properly assessed segments). Better prospects in local and regional markets; products often considered as too expensive for international markets due to organisational and logistical challenge. More dynamics and value-adding potential may be found in local/regional markets. Cluster-approaches covering several countries (see example of Shea Alliance, Baobab Alliance, similar may be for Moringa and also for mainstream products) should be considered, in particular when linked to fair trading principles and standards (incl. awareness on the values and benefits of organic agriculture), traceability, food safety and nutritional values.

Thirdly, there are not yet many functional trade platforms for the organic private sector, except for some networks and associations. Drawing in the private sector more as a driver for developing the organic sector can help to set the stage for national policies and priorities. This would need to include frameworks regarding products and markets (see section 6.4 on enabling environment), diversification and value addition/processing.

Possible ways to do this were discussed with Mr. Markus Reetz (Coordinator International Exhibitions of Nuremberg Messe) resulting in the following suggestions for trade fairs events based on the following 3 pillars:

1. Live demo’s and cooking/product application shows, with focus on ‘health & nutrition’ of African crops;

2. Education and inspiration: Conferences to cover current topics: innovations in production technologies (such as drone operated crop health management systems), post-harvest, processing, cold chain and logistics; PGS systems and policy development;

3. Permanent reflection and learning over time and consecutive trade fairs addressing topics (such as policy issues, investment needs, food safety, trends etc.). Parallel digital trade platforms will be also supportive in this regard and increasingly common.

Such fairs can be moving through Africa with a 3 or 4-yearly regional format, accompanied by a permanent platform on the Internet. Although digital trade fairs are relatively new and effectiveness are still to be proven, it offers a relatively cheap opportunity to pilot and initiate new concepts, including an organic trade fair event in Africa.
Besides, annual trade fair events at national level and linked to existing conferences or conventional trade shows can be organized for the larger African markets. Earlier examples given are the South African private sector initiatives of CANI and Organic & Natural Products Expo. For 2021, CANI is now planning to bi-annually link up with the Intra African Trade Fair and alternate with a locally organized trade fair event in Durban.

In parallel, digitised trade promotion platforms (linked to GIZ’s knowledge platforms and linked with BioFach International) can collect and re-direct trade and consumer interests. The platform(s) can share information on food safety, nutritional values etc and have annual national updates. This activity can mirror the developments in the sector resulting in increasing trade development figures. Also platforms with no specific focus on organic or sustainable agriculture should be taken into account, and approached for collaboration to address organic focused themes. An example are the monthly meetings of Nourishing Africa.

The fair activities, events and platforms can initiate and promote collective marketing strategies with prioritised product-market strategies (local, regional) by organic business associations; target groups are producers in the first place, followed by consumers, retail, organic networks and NGOs, development projects and stakeholders.

Most importantly, this should be driven by the private sector and consumer panels, with financial and content support from the public sector. This in turn will attract funding and investments (micro- and rural finance, trade finance, start-up and equity finance) from donors, (development) banks and private sector, including credit lines for trade, investments in production and post-harvest handling and processing, digital payment systems, etc. Taking the example of CANI partnering with IATF; for the latter the Afreximbank is one of the initiators.

From a development perspective, the economic impact offers many opportunities for youth employment (for which there are currently many support programmes), engaging with digital technologies for production systems (soil & water), traceability, food-safety, trade promotion platforms (with production-consumption seasonal calendars), benchmarking and certification.

Opportunities and threats

- Unlocking African trade potentials requires levels of transparency and ‘rules of the game’ (unambiguous, ‘organic by default’ does not exist), which are understood and agreed by the actors involved. Cases of e.g. South Africa, Uganda, Burkina Faso, Ethiopia and Namibia show how this can become successful when more embedded and articulated at national level and in government policy (regulatory framework). This is an important driver to gain market credibility and acceptance.

- Collaboration between groups representing various agricultural systems: Ecological Organic Agriculture, Agroecology, Agrobiodiversity, Regenerative Agriculture, Sustainable Agriculture, ‘climate-smart’, ‘landscaping approach’. Organic could well be a common denominator, if clearly understood and agreed; common understanding ultimately determines the success of organic production and trade, even if production systems may vary. The AU uses EOA to bring together organic and AE approaches.

- Although many stakeholders still struggle with the complex PGS requirements and many PGS are not fully functional assessed against the IFOAM criteria, PGS is in practice very flexible and adaptive to local needs; it needs to be made more applicable and systemised so that communication between the various groups and stakeholders is clear, in particular also for marketing purposes and consumer understanding.

- IFOAM and GIZ may well initiate a dialogue with AfCFTA to start a designated taskforce, and offer support in the designing of policies and strategies to develop organic value chains in the regions and countries, as described in this report; such taskforce ideally includes representatives of the African Organic Network (AfrOnet), the Initiative on Ecological Organic Agriculture.
Agriculture (Biovision Africa Trust and PELUM), and the BMZ/GIZ supported Knowledge Hubs for Organic Agriculture in Africa.

- Internationally operating organic entrepreneurs require proper sector institutions and structures to secure their investments and facilitate their trade, such as certification bodies, testing laboratories, R&D, and trade facilitation bodies.

6.2. Strategic Intervention 2: Capacity building of actors

Summary

Eventually, the market including trade is well-functioning if all actors, on individual, institutional and sector levels have the capacity to operate, strategise and develop the market functions as for instance described by the MSD donuts. Strategic intervention 2 therefore focuses on capacity development in an MSD approach including of private sector actors along the value chain from field to plate, on the capacity of governance (e.g. trade or production rules setting and verification) and on the capacity of supporting services (e.g. innovation support). Strategic Intervention 1 and 2 can show overlap. Whereas Strategic Intervention 1 is more on the actions of the private sector itself, Strategic Intervention 2 focuses more on the required support to facilitate trade. Supporting organic trade fairs with capacity development may be part of that approach.

Narrative

A Market Systems Development (MSD) approach takes a systemic view analysing the opportunities and bottlenecks of the organic market in Africa including on local, national, regional, continental and international levels. After the detailed analyses, the trade facilitating interventions, e.g. a development project, an investment endeavour or a government effort is active in building and developing the capacity of necessary market functions (which may be a trade fair) addressing the most urgent needs and causes of dysfunctionalities.

Opportunities and bottlenecks may lie on all levels, for instance in the capacity of farmers to produce in terms of quality and quantity what the market demands, in the capacity of organic food industries to invest in processing and marketing the value-added products, in the capacity to facilitate trade, or in the capacity of the service providers (including a trade fair organiser) to create a conducive environment.

This intervention strategy foresees action to support the sector actors to build the infrastructure, the knowledge and the awareness, which is required so that the market operates on the envisioned level. Sector visions, objectives and national action plans determine the directions and the common goals and values so that actors are united and work in the same direction.

Typical actions to reach the objectives with this strategy include training of stakeholders, enabling stakeholders to render the services that are needed in the market (e.g. certification and compliance support, seed development, input supply, business development services, value chain matching services, information systems, trade fairs, market match making etc.) or setting up rules and service structures that are lacking in the market. The actions to be implemented are determined by the specificity of the market, which is supposed to be facilitated and varies case by case. Usually, the needs of the market are much higher than availability of funds so that priorities need to be made, which are guided by effectiveness considerations (choosing the action with the highest impact). Highly strategic and specific objective setting (SMART) and coordination is a precondition for this scenario to become successful.

The Knowledge Hubs for Organic Agriculture in Africa, which are in the phase of initiation, so far take this approach to a certain extent. They collect, verify and disseminate knowledge and network value chain actors with the purpose of increasing the knowledge and capacity in the sector.
Assumptions and preconditions for success

This intervention strategy requires a non-refundable investment into a common good. That is why this approach has become more popular among development projects than among private investors. For governments, this approach is interesting if they have a functioning private sector tax system in place, if they have political willingness for economic occupation facilitation or if there is a need for ecosystem services.

The strategy also requires highly strategic leadership and management of the intervention. It needs a high level of flexibilities since opportunities may arise and vanish very quickly (e.g. government policies or market opportunities that are also interesting for competitors from other continents). Learning and enabling institutions to perform on a higher level can be a very slow or a very fast process depending on the actors in the institutions.

Organic trade facilitation on continental level may also be challenging since the institutions normally perform on local and country levels and rarely on continental level (even EOAI acts to a far extent on a national level). Regulatory frameworks are national. However, it makes sense to consider international challenges (e.g. the ICS rules of the EU) and opportunities (e.g. regional standards, the continental organic leadership building by GIZ, a PPP to invest in a continental organic trade fair or the Organic Africa Pavilion at BioFach).

For local and national organic farming and trading systems and markets, a geographic approach is favourable since there is a big range of product markets to facilitate and develop. For international trade (e.g. tropical fruits, shea, olive oil, cocoa or cotton), a value chain approach is preferable since actors work cross boundary and their required capacity is much more specific.

Compared to the other strategic interventions, this option forms a continuous line of attention for successful impacts. However, it is also capital and time intensive and requires several million Euros per country over a period of at least 5 years.

Development prospects for 5 - 10 years

A sufficiently-resourced MSD approach investment (finances and project management) with a scope over whole of Africa can accelerate organic trade significantly as other MSD endeavours in conventional agricultural are indicating. This scenario can assure that capacities on a broad level increase and that access to knowledge and institutional development support is well available. It can be expected that high potential low development areas (e.g. Algeria, Namibia or Sierra Leone) develop the market manifolds. Countries in the middle range (e.g. Ethiopia, Madagascar, Togo or South Africa) that are already showing indications of organic market growth can easily double or triple their volume of organic trade within 5-10 years.

The developments in more advanced countries (e.g. in North Africa, Sao Tome or Uganda) may be slower in terms of the factor of growth, since their institution already perform fairly well and optimisation requires higher investments. However, they have not reached their potentials by far and high increases of the market volume can also be expected there (e.g. with improving the access to the European olive oil market through self-processed and well branded own olive oil marketing chains but possibly also with general institutional capacity building).

Investment and sustainability strategy (business model)

While prospects in this high investment strategy are very good, it is impossible to calculate a business plan for it at this stage, as there are many open factors. Capacity development is process, and impacts depend on the future capacity of stakeholders to turn learnings into economic performance. Sustainability is an underlying principle of the strategy and is considered in every

104 MSD examples can be found here: https://www.marketsystemssymposium.org/
activity. The external investment concentrates on facilitating knowledge (e.g. learning exchanges of PGS initiatives) and other non-competitive public goods (e.g. public information systems, innovation research or customer awareness building) and helps the private sector to make good decisions. However, it refrains from performing market functions even temporarily.

Opportunities and threats

The main opportunities of this intervention include:

- Holistic analyses and targeted actions;
- Very situation specific and objective oriented.
- Possibilities to prioritise inclusiveness and specific target groups (e.g. women farmers, youth);
- Improved capacity of actors translates into capacity building of further actors;
- Very high impact and sustainability opportunities with a success proven approach in conventional value chain projects.

The main risks include:

- Planning and management failures;
- Spreading thin resources in comparison to big objectives. Setting the scope too wide in a too complex environment;
- Systems are too slow in changing, e.g. through lack of political will, lack of collaboration in the private sector or limitations of civil society;
- Target areas do not recognise their best market potentials and don’t have the possibility to invest and innovate sufficiently;
- Competition from more dynamic markets.

6.3. Strategic Intervention 3: Information systems building

Summary

Markets require transparency, including but not limited to information about demand, framework rules, opportunities, technology and actors. This intervention aims at investments into access to information as a public good for all actors so that the private sector, government and civil society can improve and optimise its behaviour and the functioning of the markets. As a result, organic trade grows. Information for a target country may be generic and already available internationally (e.g. principles of Organic Agriculture, knowledge about farming, health benefits or export rules into the EU/US/Japan) or specific and it may need to be developed first (e.g. national statistics, directories or environmental/social benefits in the national context). This information provided e.g. by the government, local chambers of commerce or organic umbrella bodies can contribute to sector development. An organic continental trade fair may be a vessel to collect and disseminate information. The KCOAs could also play an important role especially in filling information gaps around national statistics and regulations.

Narrative

Market actors usually perform their roles to the best of their knowledge in a given setting. They have the wish to develop, grow and expand their operations. However, actors in the organic markets in
Africa (including producers, service providers, sector governors, traders and consumers) have difficulty to improve due to a lack of transparency, and a lack of access to proper information. Sometimes, the information does not even exist, demonstrated for instance by the fact that no country has proper national organic consumption data. Sometimes, information exists somewhere, but is not accessible, and sometimes the information is available but it does not reach the target group (ignorance of existence or inconvenient provision of information). In this case a continental organic trade fair could be very helpful.

This strategic intervention therefore aims at an approach to generate important information, to make it available and to sensitize target groups with this information. While some information is valid for a long time (e.g. regulation or organic system principles) other information (e.g. market prices, market volumes or actors’ profiles) change frequently and it takes a regular effort to keep information accurate and relevant.

Since most of this kind of information is a public good, this scenario requires a public investment (e.g. government supported by a donor), although increasingly innovative paid digital services from local private sector become available. Exclusive information (e.g. a market research as needed for market exploration by buyers) may also be financed by value chain actors. A trade facilitation project for Africa ideally analyses the priorities on continental, regional and national levels and develops a continental concept with regional and national chapters for the country specific information and for sensitisation of the use of information.

There are various initiatives to improve the information systems including by governments (e.g. in Morocco or South Africa), by African (e.g. CTAB Tunisia) and overseas research institutions (e.g. FiBL) and by NGOs (e.g. national umbrella organisations that produce directories such as in Tanzania, the PGS promotion in Burkina Faso or the Infonet of BVAT). The Knowledge Hubs for Organic Agriculture in Africa, supported by GIZ/BMZ, build up a knowledge database with the purpose to build farming knowledge management and disseminate knowledge in the sector.

A lot of information is however absent and actors complain about its absence. The following list exemplifies information which is lacking and which solutions could accelerate the market development:

- National organic statistics for production, producers, trade and consumption indicators with geographic and product segregations including for certified, PGS and non-certified organic agriculture. Trade statistics for volumes and values. National statistics projects supported by regional or even a continental programs are suggested. In existing trade statistics programs alignment with organic data should be sought for;
- Regulation details for PGS, national, regional and international public and private standards. This includes also the scope, limits and interpretation of regulations and its derogations. Further examples are common product specifications and quality requirements such as maximum levels of residues or of GMO traces. The KCOAs and NOAMs could play an important role here;
- Actors directories including the links to more specific information about their supply and demand as well as their interests. Such directories could be complemented with networking events (See scenario A). Actors include the value chain actors and service providers including those active in promotion and governance. Again the KCOAs and NOAMs could play an important role here;
- (Regularly updated) market prices. ITC or even private sector solutions could play a role here;
- Technical production information for producers, processors, traders and consumers; This includes also guidelines to organised groups of producers for instance how to build PGS and through that build the local market in a certain context.
MARKET ANALYSIS AND RECOMMENDED INTERVENTIONS TO BOOST ORGANIC TRADE IN AFRICA

- Consumer information to explain functioning of labelling and tracing and to describe personal and public benefits of organic products. This information addresses consumers directly, their associations, organic promoters and communication departments of organic producers/traders. IFOAM and retail could play an active role here;
- Promotion information including for advocacy to facilitate true cost accounting and to provide evidence for effectiveness of public investments;
- Information about trends and developments including market prospects, demand shifts and upcoming discussions to consider in the strategy of the actors.

Since not all those aspects may be possible to address, priority analyses need to be executed considering the actions that bring the highest benefit for the private sector and highest impact for trade development. There are various formats that may be accurate such as publicly accessible databases newsletters, websites or media information.

Assumptions and preconditions for success

This strategic intervention requires mostly public investment, and for consumer information and paid market information solutions private investment. Since a lot of the information is crucial for actors in many countries, and for a larger geographical range, the potential synergy to not only work at target country level but with a regional or continental scope is important.

There are already information provision services to work with this strategy. Some of the information services are targeted to a certain region but are well applicable to other regions as well and do not need to be replicated and be operated in competition (e.g. FiBL statistics, ITC standards map, KCOA/Africa Manual, EU regulation publications, CBI surveys and manuals, etc.). It makes sense to cooperate with certain institutions (e.g. IFOAM Honest Food campaign) to adapt existing information to local conditions (e.g. local languages and local images) rather than reinventing the information. A good starting point is when above organisations are invited by IFOAM and the GIZ Knowledge hubs and to start discussing the needs and solutions for the following three information gaps: statistics, regulations and consumer information. In parallel and following these discussions, initiatives at country and regional level should lead to synergizing information on these three gaps.

A precondition for success is that the intervention not only focuses on the generation of information, but also on enabling user groups in accessing the relevant knowledge. Access to knowledge is an important indicator not least to judge whether a certain kind of information has positive impact.

The intervention must have a sustainability strategy from the beginning and it must have clear ideas, which partner will provide the information on long term. This precondition may be best fulfilled with a decentralised strategy and a network of actors that are empowered to provide the information. A centralised approach with an African organic information centre may be a nice idea, but there is a high risk that it will be abandoned after project ending.

This intervention on information systems works best when combined with the capacity building intervention. Many actors may need support in making use of the information that is made available.

Development prospects for 5 - 10 years

The output of this intervention is available and improved information throughout Africa and beyond (internationally e.g. for purposes of export conditions or technical information). The outcome is the use of provided information by users (e.g. downloads, increased knowledge of operators or decisions that require information that previously was not available). The impact will be increased documented trade (volume and value) for the local and international markets. This may not be fast with this approach, since actors first need to translate the created transparency into higher performance. However, it is very fair (all actor can access information) and easy to scale since all market actors
have the same preconditions and benefit including those that are not in direct contact with the project. It is also a high impact potential approach.

The monitoring and evaluation - usually for internal purposes only - itself contributes to the desired development of transparency of the market.

Compared to other interventions, it is easier to cover the whole continent (at least with generic information), to scale participation and to let many actors benefit. The investment means are lower than in the other interventions.

**Investment and sustainability strategy (business model)**

Transparency of the market can be increased through this information provision, lesser or more investments determining the scale of outcomes. Each piece of the puzzle will contribute to improve the system, even though good to realise that there are huge needs for such investments. Required investments in the areas of better organic statistics, better regulation details and actors directories are public investments and an important first step can be initiated by the KCOAs.

As stated above, the sustainability strategy determines the intervention architecture, that is preferably designed to empower African (and international) (private and public) partners to perform certain information services sustainably.

**Opportunities and threats**

The main opportunities of this scenarios include:

- Very high synergy potentials between the countries;
- Equally improved conditions and opportunities for lowering costs for all operators. It doesn’t distort the market and easily scales;
- Possibilities to prioritise specific information for income or for targeting trade development (e.g. consumer's benefit to boost demand);
- Transparency builds trust in target markets;
- Very high long-term impact and sustainability opportunities with a decentralised partner approach.

The main risks include:

- Remote approach, risk of being far from beneficiaries in case of a continental approach;
- Investment into non-relevant information systems;
- Operators and other stakeholders are slow in changing;
- Other systemic bottlenecks are not addressed (e.g. capacity building, services, policy needs or investment capital);
- lack of willingness to improve/develop/increase the market volume;
- Limited possibilities to prioritise women and vulnerable groups.

**6.4. Strategic Intervention 4: Creating an enabling environment**

**Summary**

This strategic intervention focuses on sector governance, and on the creation of a transparent and enabling environment for the private sector, thus reducing barriers for entrepreneurs to serve the organic market nationally and internationally. Facilitating the creation of such an enabling environment means policy dialogue, and capacity building of policy makers and civil society (e.g.
Business Associations and National Organic Movements). Improvements concern promotional (e.g. analysis and research, communication, subsidies etc.) and regulatory (national standards) aspects.

Narrative of the scenario

The private sector of organic businesses relies on good framework conditions including good services, well informed partners and clear and favourable common rules that are well enforced. This scenario therefore focuses on actions to support Africa and African states to promote and regulate the organic sectors in order to provide good framework conditions for enabling farmers and businesses to produce profitably for the (local and international) market and to make them competitive.

The approach is a support to:

a) advocates who create the political will for needed changes;

b) the administrations in government and civil society that need technical and management knowledge to prepare and implement policies and legal acts; and

c) the political decision makers that have the power to decide and to allocate budget.

There are actions at continental level with the African Union (AU) and AfCFTA, and with the continental organic institutions (AfrONet, EOA-CSC, NOARA) and CAADP. It is important to establish an advisory function for national governments, and to use the trust and authority of the continental institutions. Similarly, there are regional actors with a focus on promotion and regional standards which may be accepted as an equivalent by the EU (e.g. towards ECOWAS that is already active or to support development of the East Africa Organic Standard).

Since the main legislative power lies with countries, the focus of the approach has to be at national levels. Improving the legislative environment (in terms of both setting rules and implementing them) is a constant task. Actions need to focus on building capacities of institutions in the public and private sectors, and of civil society to join in continuous policy development.

To make this possible, good awareness of the benefits of organic agriculture needs to be present. Otherwise it is impossible in the long run to get governments to invest in the three areas that must be covered: promotion, rules development, and enforcement of the rules. Experience shows that, even if some success is achieved by getting e.g. organic agriculture in investment plans or in National Organic Action plans, this is not effective if there is little attention, or no means, for implementation.

Important aspects in this scenario include:

1. Policy development needs to start with promotional aspects so that basic services are available before regulation starts: This includes research, advisory services, consumer information campaigns, vocational and expert training, quality control services (e.g. labs) and trade facilitation services. Even subsidies e.g. for transition, certification or inputs may be a step preceding regulation.

2. Regulations on how to farm, process and market organically need to be set up with care, with the purpose to let production and the market grow. Rules need to be farmers-friendly (e.g. consider that smallholder farmers are often illiterate and need simple practical rules). They serve to protect the consumers and the integrity of the term organic but priority is oriented to the situation in the market. (e.g. how much the term is misused, or how much third-party certification is precondition for trust).

3. The considerations in policy setting differentiate between local and international markets. For instance, the regulation allows PGS and ICS for local markets or require a quality management, which is available, affordable and competitive in the local market. Regulations for the local market should focus on the local stakeholders and be strongly adapted to local conditions, even if in other places certain practices are not allowed (e.g. allow a high share of conventional feed for livestock if organic feed is not available on the market). However,
standards for exported products need to be equivalent with the standards in the target markets. That applies not only to the standards, but also the conformity assessments and the management of the regulations by the competent authority.

4. The institutions and policy development processes ensure a high participation of all stakeholder groups and balance the interests well. This includes the various types of farmers (e.g. smallholders, farm enterprises and their plantations), the processing and trading companies, the service providers and the consumers. All actions and project planning need to acknowledge that influencing the policy framework is based on the local political culture and happens within an existing system.

5. Sustainability of policy influence requires well-performing institutions owned by stakeholders that lead the discussions rather than quick external inputs of international experts. Organic framework building includes clear participation in the visions and strategy of the overall agriculture paradigm in the country (e.g. there is a need in participation in debates about land access, about farmers rights, seed legislation or infrastructure in the country).

6. Using the power of clear visioning and unity in the sector are important features to convince in policy setting. The principles of Sustainability and True Cost Accounting are good guidance that have an inherent societal logic and favour organic development over e.g. short-term extractive agriculture strategies. The dialogues over GMO and open access to genetic resources, soil and water conversation strategies are important features that need a (national) lead of organic institutions.

7. A continental organic trade fair could play an important role in this strategic pathway as it is the case in BIOFACH Nuremberg. In Africa, with policy makers that want to see and experience evidence, a trade show is an excellent opportunity to showcase importance, to bring the right people together and to provide public profiling of policy makers making public statements.

Eventually, business associations representing their interests and the governments need to invest themselves into advocacy and sector governance. An external donor can accelerate and catalyse the building and capacitating of the required institutional landscape with external means, but impact often is beyond a usual project time frame.

Various existing projects include this approach in their strategy. This is e.g. the case for EOAI, the AfrONet/AFD project or various FiBL projects. In some countries (e.g. Tunisia, Morocco, Kenya, Uganda, Madagascar) the sector and governments are already quite active in improving the framework conditions, while in other countries there is little action or there are unaware or resistant policy setters and the advocating institutions are very weak.

Assumptions and preconditions for success

This intervention has political dimensions, and therefore needs a political approach for policy setting and enforcing in a country. A precondition for this approach is the existence of organised organic stakeholders that are committed to defend their interest and develop political and convening powers in the existing systems.

To be successful, the intervention needs to be very pragmatic and ready to make compromises. Priorities do not depend on what is desirable, but what is feasible. A good advocacy strategy analyses the political situation and strengthens the positions of the organic movement and influences in windows of opportunities that are arising through political processes in its own context (e.g. policy revisions, elections, nurturing debates of concerns such as food safety in COVID times).

Development prospects for 5 - 10 years
Improving political framework conditions is one of the most sustainable development approaches. The approach works in any context, however it is dependent itself on the political system and the political powers. Expectations of progress need to vary considerably (e.g. Morocco invests in organic development on its own, while in Kenya it took more than 10 years to approve a rather generic organic policy paper). Most governments are interested in economic progress, GDP development and jobs creation. Increasingly - with the international debate about environmental issues and with problems manifesting themselves in reality (e.g. extension of the desert or exhaustion of resources such as fishes) - environmental problems become more and more in the focus of the interest of policy makers. The SDGs are a very good framework to which organic can contribute and hence it may be in the interest of governments so that they understand advocacy an invaluable service rather than a threat. There needs to be a balance between addressing issues credibly and outspoken (e.g. the GMO issue or the farmers rights to use traditional seeds or land access of smallholders) by proposing alternatives and collaboration with the legitimate powers that may not represent the values and objectives of organic agriculture nor the interest of smallholder farmers or consumers, when it comes to farming systems.

A smart country strategy is important and there are recommendations e.g. of IFOAM - Organics International’s policy tool kit on how to prioritise steps and about the technical details. There is also abundant experience and lessons learned including from Africa (particularly North Africa) but also from other low-income countries around the world. Those recommendations (e.g. to promote organic before regulating it and to regulate for the domestic market only once there is economically relevant misuse of the term organic) are important in order to accelerate developments rather than to repeat the painful mistakes.

**Investment and sustainability strategy (business model)**

As stated above, the approach is slow but it is very sustainable in stable political systems. Advocacy is what most NOAMs are doing. The most logic sustainability strategy are membership fees and donations by powerful stakeholders that invest in the representation of their interests. However, stakeholders would only do that if they see the capacity in lobby organisations.

Most African organic sectors are too weak to implement powerful far reaching advocacy campaigns and that is why the incapacitating the sector is a big need. In most cases, the organic actors are not well organised, often lacking a strong private sector voice (no organic business organisations or low membership of businesses in the NOAMs). NOAMs lack the knowledge of building smart strategies, and don not have the networks and the financial means to build up the structures that are needed to implement actions as described above.

At the same time, in many countries there is sufficient business potential to allow for advocacy structures based on membership fees, so that an external investment e.g. of an institutional donor has a basis to become sustainable. There are also good country examples, e.g. Tanzania, Kenya and South Africa and to a certain extent also Senegal, Ghana, Nigeria, Madagascar and Morocco, where representatives of the organic movement are in an effective policy dialog. On a regional level, there are WAFRONET (West Africa) and ISAN (Southern Africa) that have advocacy in their mission, but their advocacy is in an infant stage. On continental level, AfrONet and EOAI are working on the awareness about alternatives to green revolution and for agroecological strategies, but they depend on donor means and lack a sustainability strategy.

**Opportunities and threats**

The main opportunities of this strategic intervention include:

- Empowering the sector towards a very important function that is needed sustainably;
- Promotion, developing regulations and implementation thereof are preconditions for a thriving sector development in the long run;
There is a great diversity of sector governance in African countries; in some countries a total absence of government awareness about organic, and in contrast one of the most intensive government efforts in Tunisia); countries can learn from each other;

The European organic sector is using this model with IFOAM EU taking the lead in coordinating and empowering the sectors doing effective advocacy on all levels.

The main risks include:

- Investments may lead to unsustainable actions, spending money in ineffective campaigns;
- Certain countries may not be ready yet to have sustainable advocacy structures;
- Quick successes in policy setting may not be possible to implement;
- Jumping too quick or early into regulation may rule out too many stakeholders that can’t afford this, or are discouraged to work in a certified organic system;
- Ignorance of the international experiences, and of good practices and principles in building a sustainable sector (e.g. policy briefs and organic 3.0 recommendations of IFOAM Organics International).
7. Concluding recommendations and action planning

The findings of this report, as they were also discussed in two online workshops with experts, unmistakably point to the fact that there is large scope to boost organic production and trade in Africa.

To successfully boost this trade, a smart mix of regional/national and private-sector inclusive initiatives is needed. This can be achieved through strategic collaboration among major actors interested to contribute to major shift. Part of this shift must be geared to promoting local and regional market development. It was explained and described how growing concerns of food safety and health, and a growing middle class are expected to offer the better growth potential (Sections 5.4 and 6.1).

On the question “How can the goal of boosting organic trade be achieved (most effectively and efficiently)?”, Chapter 6 elaborated four strategic pathways. They are related and ideally work in conjunction and with synergies (through strategic partnerships) to achieve sector development and trade, involving various perspectives:

- Strategic Intervention 1: Market development and Trade facilitation
- Strategic Intervention 2: Capacity building of actors
- Strategic Intervention 3: Information systems building
- Strategic Intervention 4: Creating an enabling environment

Summarised, developments can take shape with the following actors, investments and mechanisms:

<table>
<thead>
<tr>
<th>Strategic intervention activities</th>
<th>Actor</th>
<th>Mechanism</th>
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<tbody>
<tr>
<td><strong>Market development and Trade facilitation:</strong></td>
<td></td>
<td></td>
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<tr>
<td>• Strategic product-market development: Product innovation and value addition, R&amp;D</td>
<td>Private sector</td>
<td>Innovation support: Roundtable meetings, challenge and incubating support and finance</td>
</tr>
<tr>
<td>• Market build-up:</td>
<td>R&amp;D Institutes, Universities, NGOs</td>
<td>Public-private partnerships</td>
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<tr>
<td>o Accelerating private sector initiatives &amp; investment</td>
<td>Organic networks, NGOs</td>
<td>Tailor-made Trade Fairs events</td>
</tr>
<tr>
<td>o Linking with buyers and consumers</td>
<td>Service providers</td>
<td>Trade Promotion Platforms (Live and on-line)</td>
</tr>
<tr>
<td>• Organic trade facilitation and promotion</td>
<td>Donors</td>
<td>Trade promotion support (Capacity building)</td>
</tr>
<tr>
<td><strong>Capacity building of actors:</strong></td>
<td>KCOAs</td>
<td>Crosscutting</td>
</tr>
<tr>
<td>• Supply chain actors: producers, processors, traders, consumers etc.</td>
<td>Organic networks, NGOs</td>
<td></td>
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<tr>
<td>• Supporting organisations: government, private associations</td>
<td>NOAMs</td>
<td></td>
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<td></td>
<td>Service providers</td>
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<td></td>
<td>Donors</td>
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<tr>
<td><strong>Information systems building:</strong></td>
<td>National statistics</td>
<td>Partner dialogues to agree on information needs and joint action through existing and new programs.</td>
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<tr>
<td>• National statistics on organic production and trade</td>
<td>NOAMs</td>
<td>Setting up new or extending existing directories and knowledge platform(s)</td>
</tr>
<tr>
<td>• Regulations and compliance</td>
<td>GIZ - KCOAs</td>
<td></td>
</tr>
<tr>
<td>• Actors directories</td>
<td>IFOAM</td>
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</table>
When taking ‘Market development and Trade facilitation’ as a lead motive to boost organic production and trade, the development scenarios could evolve by taking elements of the other Strategic Interventions. While the real investment period to achieve major advancement in organic trade must be considered to take 5 to 10 years (as described in Chapter 6) and extension to all regions, we focus here on the shorter term investment. We are opting for a relatively short first phase of 3 years in total, to evaluate effectiveness of the approach at an early stage and improve when and where needed. For this first phase, IFOAM with partners will develop a more detailed concept note and proposal. It will be shared and discussed with potential donors for funding a support programme focussing on capacity building for market development and trade facilitation.

**Year 1-3: Enabling trade promotion**

Tailored building of Capacities, Information Systems and Enabling Environment, geared to active Trade Promotion in Years 2 and 3. We recommend to start with active trade promotion in East Africa (Year 1 and 2) and North Africa (Year 3). If and when the approach proves to be effective, a next phase could extend to Southern Africa and West Africa, possibly also Central Africa.

The rationale for starting in East Africa and then moving to North Africa for regional activities is based on the assessment of potential market demand. Besides, in Year 1 (2021) already trade fair activities in Southern Africa are taking place which could lead to partnerships and coordination for the other regions in subsequent years. Further considerations concerning capacities and political realities, as well as the forging of potential partnerships (e.g. linked with the GIZ Knowledge Hubs for Organic Agriculture), will also have an implication on developing the next concrete steps.

Year 1 will be marked by linking actors and networks:

- **IFOAM and GIZ may well initiate a dialogue with a designated taskforce of AfCFTA and offer support in the designing of policies and strategies to develop organic value chains in the regions and countries, as described in this report; such taskforce ideally includes representatives of the African Organic Network (AfrOnet), the Initiative on Ecological Organic Agriculture (Biovision Africa Trust and PELUM), and the BMZ/GIZ supported Knowledge Hubs for Organic Agriculture in Africa.**

- **IFOAM, GIZ and European private sector representatives will engage further with African private sector initiatives such CANI, Organic & Natural Products Expo, IATF, Food & Beverages East Africa (all have planned events for 2021) and potential other initiatives in other regions.**

- **Considerations in policy and strategies differ between local and international markets. For instance, the regulation allows PGS and ICS for local markets or require a quality**
management which is available, affordable and competitive in the local market. Regulations for the local market should focus on local stakeholders, in particular private sector, and be strongly adapted to local conditions. Standards for exported products need to be equivalent with the standards in the target markets. That applies not only to the standards, but also the conformity assessments and the management of the regulations by the competent authority (to be identified as often lacking).

- Internationally operating organic entrepreneurs require proper sector institutions and structures to secure their investments and facilitate their trade. This includes among others certification bodies, testing laboratories, R&D, and trade facilitation bodies; all of these are critical to make the sector successful. It was suggested to form a kind of organic exporters club as point of call at national level to make such approach successful with said institutions.

- Capacity development of stakeholders to turn learnings into economic performance. Sustainability is an underlying principle of the strategy and is considered in every activity. The external investment concentrates on facilitating knowledge (e.g. learning exchanges of PGS initiatives) and other non-competitive public goods (e.g. public information systems, innovation research or customer awareness building) and helps the private sector to make good decisions.

- Setting priorities on continental, regional and national levels and developing a continental concept with regional and national chapters for the country specific information and for sensitisation of the use of information (based on the regional analyses in this report). There are actions at continental level with the African Union (AU) and AfCFTA, and with the continental organic institutions (AfrONet, EOA-CSC, NOARA) and CAADP. It is important to establish an advisory function for national governments, and to use the trust and authority of the continental institutions. Similarly, there are regional actors with a focus on promotion and regional standards which may be accepted as an equivalent by the EU (e.g. towards ECOWAS that is already active or to support development of the East Africa Organic Standard), and overseas research institutions (e.g. FiBL), the Knowledge Hubs for Organic Agriculture in Africa supported by GIZ/BMZ, and NGOs.

- Since the main legislative power lies with countries, the focus of the approach has to be at national levels. Improving the legislative environment (in terms of both setting rules and implementing them) is a constant task. Actions need to focus on building capacities of known persons in public and private sector bodies, and of civil society to join in on continuous policy development. Business associations/clubs representing their interests and the governments need to invest in advocacy and sector governance. An external donor can accelerate and catalyse the building and capacitating of the required institutional landscape with external means, but impact often is beyond a usual project time frame.

- Various existing projects have this approach in their strategy. This is e.g. the case for EOAI, the AfrONet/AFD project or various FiBL projects. In some countries (e.g. Tunisia, Morocco, Kenya, Uganda, Madagascar), the sector and governments are already quite active in improving the framework conditions, while in other countries there is little action or there are unaware or resistant policy setters and the advocating institutions are very weak. Private sector clubs can push for change in this respect.
**Year 2-3: Active Trade Promotion**

In years 2 and 3, activities will focus on partnering in or supporting tailor-made trade promotion events, to highlight the potential of organic trade and to identify product-market matches.

Considering market opportunities and wider spread, we suggest in the 2nd year to focus on East Africa/Kenya, with a tailored organic trade fair concept in an existing trade fair (such as Food & Beverages East Africa, Food Agro Africa or similar).

In the 3rd year, a similar activity can be organised in North Africa, for which a target country must be selected (as there are some competing options). After evaluating the results, choices can be made for the other regions.

The principles of the approach are:

- Continental organic trade fairs are an important strategic pathway, as it is the case with BIOFACH Nuremberg. In Africa, with policy makers that want to see and experience evidence, a trade show is an excellent opportunity to showcase importance, to bring the right people together and to provide public profiling of policy makers making public statements.

- Trade fairs events based on the 3 pillars identified in Section 5.1:
  - Live demo’s such as ‘Live and Cooking shows’, with focus on ‘health & nutrition’ based on African crops;
  - Education: Conferences to cover current topics: innovations in production technologies (such as drone operated crop health management systems), post-harvest, processing; cold chain and logistics; PGS systems and policy development;
  - Permanent reflection and learning over time and consecutive trade fairs addressing topics (such as policy issues, investment needs, food safety, trends etc.). Parallel digital trade platforms will be also supportive in this regard and increasingly common.

- Such fairs can be annual at national level, and moving through Africa with a 3 or 4-yearly regional format, accompanied by a permanent platform on the Internet.

- Consecutively, digitised trade promotion platforms (e.g. based on GIZ’s digital knowledge platform and the next digital BioFach 2021) to collect and re-direct trade and consumer interests (food safety, nutritional values), with annual national updates; this can mirror the developments in the sector with clear trade development figures.

- Collective/clustered marketing strategies with prioritised product-market strategies (local, regional) by organic business associations; target groups are producers in the first place, followed by consumers, retail, organic networks and NGOs, development projects and stakeholders.

- The concepts must be driven by the private sector and consumer panels, with public financial support. This in turn will attract funding and investments (micro- and rural finance, trade finance, start-up and equity finance) from donors, [development] banks and private sector, including credit lines for trade, investments in production and post-harvest handling and processing, digital payment systems, etc.

- This in turn is an opportunity to showcase options for youth employment (for which there are currently many support programmes), engaging with digital technologies for production systems (soil & water), traceability, food-safety, trade promotion platforms (with production-consumption seasonal calendars), benchmarking and certification.
We believe that this report offers substantial information for determining national and regional priorities of action, and potential organic value chains that can be considered for further development. It is now up to the listed actors to turn these opportunities into action by commissioning the development of respective proposals and business plans.

Depending on the continental and regional priorities and scope that the organising actors set for themselves, the authors believe that the above described scenario covering 2 regions would call for an estimated budget of EUR 3-4 million taking into account that it can build on other existing programmes. We also realize that engaging private sector investments will be difficult with the current global pandemic of COVID-19 and that the negative effect on global trade, in Africa and with service providers such as trade fair organizers are to be taken into account.
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### ANNEX II Resource persons list

#### 1. Interview resource persons

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#### 2. Workshop I participants

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### Workshop II participants

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3. **Workshop II participants**
ANNEX III – Article 36: Group of operators

Text of "Art 36 group of operators" of the new EU regulation

Article 36 Group of operators
1. Each group of operators shall:
   (a) only be composed of members who are farmers or operators that produce algae or aquaculture animals and who in addition may be engaged in processing, preparation or placing on the market of food or feed;
   (b) only be composed of members:
      (i) of which the individual certification cost represents more than 2% of each member’s turnover or standard output of organic production and whose annual turnover of organic production is not more than EUR 25,000 or whose standard output of organic production is not more than EUR 15,000 per year; or
      (ii) who have each holdings of maximum:
         — five hectares,
         — 0.5 hectares, in the case of greenhouses, or
         — 15 hectares, exclusively in the case of permanent grassland;
   (c) be established in a Member State or a third country;
   (d) have legal personality;
   (e) only be composed of members whose production activities take place in geographical proximity to each other;
   (f) set up a joint marketing system for the products produced by the group; and
   (g) establish a system for internal controls comprising a documented set of control activities and procedures in accordance with which an identified person or body is responsible for verifying compliance with this Regulation of each member of the group.

2. Competent authorities, or, where appropriate, control authorities or control bodies, shall withdraw the certificate referred to in Article 35 for the whole group where deficiencies in the set-up or functioning of the system for internal controls referred to in paragraph 1, in particular as regards failures to detect or address non-compliance by individual members of the group of operators, affect the integrity of organic and in-conversion products.

3. The Commission is empowered to adopt delegated acts in accordance with Article 54 amending paragraphs 1 and 2 of this Article by adding provisions, or by amending those added provisions, in particular as regards:
   (a) the responsibilities of the individual members of a group of operators;
   (b) the criteria to determine the geographical proximity of the members of the group, such as the sharing of facilities or sites;
   (c) the set-up and functioning of the system for internal controls, including the scope, content and frequency of the controls to be carried out and the criteria to identify deficiencies in the set-up or functioning of the system for internal controls.

4. The Commission may adopt implementing acts laying down specific rules concerning:
   (a) the composition and dimension of a group of operators;
   (b) the documents and record-keeping systems, the system for internal traceability and the list of operators;
   (c) the exchange of information between a group of operators and the competent authority or authorities, control authorities or control bodies, and between the Member States and the Commission.

Those implementing acts shall be adopted in accordance with the examination procedure referred to in Article 55(2).