Recommendations

There is further need for increasing awareness of organic guarantee systems (standards, mark, verification & control) so that consumers can learn how to identify what is organic and what is not. This could be done through increased promotion and use of East African Organic Mark and Product Standard (EAOM and EAOPS).

The East African Organic Mark (EAOM). It can be used for products produced according to the East African Organic Products Standard (EAOPS).

There may not be any other 'real' barriers to consumption given that the majority of those who have never consumed or considered consuming organic products do not have any particular reason for this or are just indifferent. This means that were they made fully aware of what organic products are and their benefits, they might be more inclined to consume. There is therefore need for increased efforts in creating awareness of the benefits of organic foods.

Organic products must also be made available since, as consumers' knowledge and awareness increase, this will be expected to lead to an increase in demand yet there seems to be a gap in the East African market where many key informants are of the view that availability is a serious issue – there are not enough suppliers and, the few who are there, are not reliable.

There is an increase in the consumption of organic dairy, meats, pasta and bread and this can be linked to awareness creation efforts bearing fruit as well as increased availability. More efforts to make them available will therefore increase the overall consumption.

Key motivating factors of consumption are still health and safety factors and these should therefore continue to be the promotional pillars for building or increasing organic consumption in East Africa.

The organic market in the East African region has been shown to have a significant potential given the willingness of consumers to pay similar or higher prices for organic products. There is therefore need for concerted efforts in building this market to provide healthy food to consumers and more incomes to farmers.

Methodology

The survey was conducted over a four-week period between March and April 2013. Both qualitative and quantitative methodologies were employed in this survey. In Kenya, Uganda and Tanzania, 200 respondent quotas (set by age and sex) were made based on randomly selected sampling points in 2006 where distribution was on probability proportionate to size in all the cities. This was done to enable empirical deductions to be made from comparison between 2006 and 2013 surveys. In Rwanda and Burundi, a quantitative sample was composed of 50 and 48 households who were randomly selected in the major cities of Kigali and Bujumbura respectively. In total data was collected from 698 households.

The qualitative survey was carried out amongst key informants in each of the 8 cities: two for each country (in Kenya, Uganda, and Tanzania) and one per country (Rwanda and Burundi). The key informants were classified into managers or proprietors of hotels, restaurants, supermarkets and greengrocers. The hospitals and universities had staff working in procurement and agriculture/nutrition department's interviewed respectively. In total 96 key informants were interviewed in the selected cities.

The report "Consumer Survey of Attitudes and Preferences Towards Organic Products in East Africa" was coordinated and compiled by Samuel Ndungu from the Kenya Organic Agriculture Network (KOAN) in the framework of the IFOAM OSEA II Project: Regional cooperation for organic standards and certification capacity in East Africa. The OSEA II Project is being undertaken with support from Swedish development cooperation. The project is sole owner of the production, and the publisher is responsible for the content.

A download of the complete report is available at: http://www.ifoam.org/en/osea-ii-project.

SWEDEN

INTERNATIONAL FEDERATION OF ORGANIC AGRICULTURE MOVEMENTS

Consumer Survey of Attitudes and Preferences Towards Organic Products in East Africa

Key Findings

1. The general awareness of organic foods increased across all countries during the reference period (2006-2013).
2. Changes in organic foods consumption patterns showed that half of the respondents who were aware of organic foods had consumed them and showed a preference for fruits and vegetables.
3. The attitudes and perceptions towards consuming organic foods are positive and consumers believe that these are good for them.
4. The key motivating factors for consumption of organic foods were identified as health and food safety.
5. Organic guarantee systems are essential for consumer trust in organic products.
6. The availability of organic products is low.

Awareness of organic foods

The awareness of organic foods and organic farming in East Africa increased from 62% to 67% from 2006 to 2013. It is highest in Uganda (83%) followed by Burundi (75%), Tanzania (63%), Kenya (55%) and Rwanda (48%). The knowledge of organic foods was based on association with various terms, which are loosely used to define organic foods respondents as shown below:

	2013	2006
Natural foods	35%	26%
Foods without chemicals	19%	17%
Foods not sprayed with pesticides	8%	9%
Traditional or indigenous foods	13%	8%
Foods grown with manure	13%	6%
Herbal foods	10%	3%
Healthy/nutritious foods	7%	3%

Definition of organic foods, according to consumers 2006 & 2013

Awareness was higher in males (70%) as compared to females (62%), and was higher for higher social economic class (77%) compared to low social economic class (44%). In addition, awareness among younger respondents was lower than among older respondents.

The most popular sources of information about organic foods are word of mouth and what is taught at schools or colleges. Other popular sources of information included television and radio programs. The survey noted a significant increase of TV and radio as a source of information in all countries surveyed.

There has been an increase in the awareness of the facts on organic foods compared to 2006 as shown below. The increase was highest in Tanzania.

		Kenya	Uganda	Tanzania	Rwanda	Burundi
There are local standards for organic products	YES	24%	26%	48%	6%	23%
	NO	77%	74 %	52%	94%	77%
There is an organic certification body in Kenya / Uganda / Tanzania	YES	22%	17%	34%	--	--
	NO	78%	83%	66%	--	--
There is a national organic movement in Kenya / Uganda / Tanzania / Rwanda / Burundi	YES	11%	33%	21%	8%	2%
	NO	89%	67%	79%	92%	98%
Organic products should be identified by a logo	YES	31%	24%	70%	72%	35%
	NO	69%	76%	31%	28%	65%

Attitudes and perceptions towards consuming organic foods

Once the respondents are exposed to the definition of organic, an overwhelming majority (93%) felt that indeed eating organic products is good and most of them also agreed that it would be very important to know whether what they consume is organic or not. The respondents also indicated the key motivating factors of consumption as health and safety as shown below:

	FRUITS & VEGETABLES	CEREALS	DAIRY PRODUCTS	MEAT	BREAD & PASTA
BASE	413	289	215	173	141
	100%	100%	100%	100%	100%
They are healthy / nutritious	56%	49%	54%	42%	35%
They are safe to consume / not contaminated	17%	14%	12%	11%	6%
They are tasty	27%	24%	32%	28%	23%
They are readily available	11%	11%	11%	8%	7%
Good for management of illnesses	17%	11%	9%	10%	4%
They are affordable	10%	11%	9%	9%	11%
They are environmentally friendly	6%	4%	0%	1%	4%
Makes me feel in touch with my indigenous roots	5%	10%	10%	9%	8%
No specific reason / indifferent	4%	9%	8%	12%	19%

Key motivating factors of consumption of organic foods

The motivation factors for choosing organic as shown above also correlated with motivations for the purchasing of food products in general.

Changes in organic consumption patterns

Almost half of the respondents have consumed organic products (49%). The number of those who were not sure or did not know if they have consumed organic foods went down by a significant 12% from 2006, while those who had considered consuming doubled to reach 12%. An overwhelming majority of those that have consumed organic foods mentioned fruits and vegetables and a significant number mentioned cereals. Organic dairy, meats, pasta and bread seem to be gaining in consumption and this can be linked to awareness creation efforts bearing fruit as well as increased availability.

Trust for verification methods

All respondents expressed need for a verification system (56%). Overall, a verification system appeared to be more important to the higher socio-economic groups than the lower ones. Those who felt there was need for a verification system preferred governments providing verification (70%). The recognition of East Africa Organic Mark (EAOM) is low (17%). The majority of those who recognized EAOM indicated that they had seen the mark on products (34%). This shows the importance of using products as carriers of the mark in enhancing awareness and identification.

Perception of organic foods

Once the respondents were exposed to the definition of organic, an overwhelming majority said that indeed eating organic products is good (88%). They also indicated that with this newly acquired knowledge it would be very important for them to consume organic foods. Additionally they expressed willingness to buy organic products if they are not significantly more expensive than the non-organic products across the socio-economic classes. This is despite the indication by key informants that organic products come with a higher price tag.

Attitudes towards organic foods by key informants

Supermarkets, hotels and restaurants are not particularly keen to sell organic products since the customers do not know enough about them and therefore do not demand any. According to them what matters more to customers is the taste, the availability, the price and the hygiene and as long as they can deliver on this, they can remain competitive in business. Key informants are of the opinion that consumers need to be educated and exposed to the need of consuming organic products. The products must also be made available as consumers' knowledge and awareness increases.