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Overview of the Current State of Organic Agriculture in Kenya, Uganda and the United Republic of Tanzania and the Opportunities for Regional Harmonization

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Prepared under the CBTF Project
'Promoting Production and Trading Opportunities for
Organic Agricultural Products in East Africa'



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Preface

Organic agriculture offers a wide range of economic, environmental, social, health and cultural benefits for developing countries. It is a powerful tool for achieving the Millennium Development Goals, particularly those related to poverty alleviation and environment. For these reasons, organic agriculture was selected by the United Nations Environment Programme (UNEP) and the United Nations Conference on Trade and Development (UNCTAD) as one of the three thematic areas to be addressed in the framework of the UNEP-UNCTAD Capacity Building Taskforce on Trade, Environment and Development (CBTF).

In 2005, after a year of consultations and preparatory activities, the CBTF launched the project “Promoting Production and Trading Opportunities for Organic Agricultural Products in East Africa”. Benefiting Kenya, Uganda and the United Republic of Tanzania, the project comprises a number of background studies on key issues such as best practices for organic policy, national integrated assessments of organic agriculture, and regional cooperation, including development of an East Africa Organic Standard. Since 2006, Burundi and Rwanda have joined regional activities. For more information, please see the CBTF website at www.unep-unctad.org/cbtf.

Partnership is the key feature of this project. At the international level, CBTF has joined forces with the International Federation of Organic Agriculture Movements (IFOAM) to support project activities. At national level, regular multi-stakeholder meetings and public-private sector dialogue are creating synergies and dynamism in the sector. At regional level, public-private sector dialogue is reinforced and ideas exchanged on the best way to move forward at national and regional level. The “East Africa Organic Team”, comprising all those committed to the development of the sector, grows stronger by the day.

This “kick off” study was commissioned in 2005 by the CBTF as a foundation for subsequent project activities. The study’s major aim was to present a “snapshot” of the status of Organic Agriculture in East Africa as seen in mid-2005. To take this picture, Alastair Taylor of Agro Eco Uganda Branch was asked to bring together different country snapshots as presented primarily by the lead organic movements/associations in each country, namely the Kenya Organic Agriculture Network (KOAN), the Tanzania Organic Agriculture Movement (TOAM) and the National Organic Agricultural Movement of Uganda (NOGAMU). Because of its experience in spearheading national standards development and certification in the region and an interest in organic policy issues, GroLink of Sweden was asked to bring into the snapshot the aspects of certification and policy, including opportunities for harmonization and cooperation within the region. No less than 22 experts have contributed to the preparation of this study—a concrete example of partnership in action.

The contents of this study were presented and discussed at CBTF regional workshops in Kampala (October 2005) and Arusha (March 2006). Feedback received has been incorporated into the final version. Most of the data is still from the time of initial drafting (i.e. mid-2005). Since that time, production and export of organic products in the three countries have continued to grow rapidly. The work of the CBTF project has also continued, and many new events have taken place.

Integrated assessments of organic agriculture are being conducted in the three countries.

The national institutions undertaking the assessments have used this overview study as a reference for background information on organic agriculture in their country. National project implementation teams are Advocates Coalition for Development and Environment (ACODE), Ugandan Export Promotion Board and NOGAMU in Uganda; Envirocare, Ministry of Agriculture and TOAM in Tanzania; and Bridge Africa, National Environmental Authority and KOAN in Kenya. Final drafts of these assessments, with recommendations for government policy, are expected by mid-2007. Partly due to project activities, public sector awareness of and engagement in organic agriculture have increased and broadened considerably. In all three countries, Ministries of Agriculture and Trade have become more active, and processes are under way to develop policies and actions to promote the organic sector.

At regional level, public and private sector stakeholders have met several times to discuss various project themes. A series of CBTF-IFOAM events in December 2006 in Nairobi included an East Africa Organic Policy Workshop, where key stakeholders involved in national organic policy development exchanged ideas and experiences and formulated action plans.

The harmonization of East African organic standards called for in this overview study is well on the way to becoming a reality. Under the auspices of CBTF and IFOAM, a Regional Standard Technical Working Group (RSTWG) has met four times to write the East African Organic Standard (EAOS). The RSTWG itself is a unique public-private sector regional partnership, comprising representatives from the national bureaus of standards, the organic movements and organic certifying bodies in the five East African countries plus the East African Business Council. In the second half of 2006, the second draft of the EAOS was circulated widely for public comment, debated in six national consultations, and tested in the field by a team of organic inspectors. Results were discussed at the fourth meeting of the RSTWG in December, which also held a joint session with the IFOAM Standards Committee with a view to ensuring international private sector market acceptance of the EAOS. It is expected that the third draft of the EAOS will enter the official East African Community standards harmonization process in 2007. The launch of the EAOS will coincide with the launch of a consumer campaign in the region to promote domestic market development and build supply capacity for export.

Regular workshops and meetings in the region have strengthened and broadened the organic network identified through this study. A sense of commitment and optimism is pervading the East African organic agriculture network. Future workshops are planned for the final year of the project, and it is anticipated that the information, technical knowledge and strong relationships generated through this project will provide the East Africa Organic Team with the capacity and momentum to continue the dynamic expansion of this promising and rewarding sector in the region.



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Acronyms

ABLH	Association for Better Land Husbandry
ACODE	Advocates Coalition on Development and the Environment
BOKU	Universitat fur Bodenkulter Wien
CBI	Centre for the Promotion of Imports from Developing Countries
CBO	community-based organization
CBTF	Capacity Building Task Force on Trade, Environment and Development
CDE	Centre for Development Enterprises
CIAT	International Centre of Tropical Agriculture
EPOPA	Export Promotion of Organic Products from Africa
EUREPGAP	European Retailers Programme on Good Agricultural Practices
HIMA	Hifadhi Mazingira
ICIPE	International Centre for Insect Physiology and Ecology
ICS	internal control system
IFOAM	International Federation of Organic Agriculture Movements
IMO	Institute of Market Ecology
ITC	International Trade Centre
JAS	Japanese Agriculture Standards
KBS	Kenya Bureau of Standards
KIHATA	Kilimo Hai Tanzania
KIOF	Kenya Institute of Organic Farming
KOAN	Kenya Organic Agriculture Network
KOFA	Kenya Organic Farmers Association
KOPA	Kenya Organic Producers Association
LAMP	Land Use Management Programme
MAAIF	Ministry of Agriculture, Animal Industries and Fisheries
NGO	non-governmental organization
NOGAMU	National Organic Agricultural Movement of Uganda
NOP	National Organic Programme
NTFP	Non-timber forest products
OA	organic agriculture
OFF	Organic Food Federation
OMAP	Organic Marketing Assistance Programme
PELUM	Participatory Ecological Land Use Management
RODI	Resource Orientated Development Initiative
SA	Soil Association
SACDEP	Sustainable Agriculture Community Development Programme
SACert	Soil Association certification
SATNET	Sustainable Agriculture Trainers Network
Sida	Swedish International Development Cooperation Agency
TBS	Tanzania Bureau of Standards
TOAM	Tanzania Organic Agriculture Movement
UEPB	Uganda Export Promotion Board
UNBS	Uganda National Bureau of Standards
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Programme
UNIDO	United Nations Industrial Development Organization
UOS	Uganda Organic Standard
USDA	United States Department of Agriculture

Executive summary

This study was commissioned by the United Nations Environment Programme (UNEP) and the United Nations Conference on Trade and Development (UNCTAD) Capacity Building Taskforce on Trade, Environment and Development (CBTF) for the project “Promoting Production and Trading Opportunities for Organic Agricultural Products in East Africa”. As a foundation to following activities of CBTF, the study’s major aim was to present a “snapshot” of the status of Organic Agriculture in East Africa as seen in mid 2005 and the opportunities for harmonization and cooperation within the region.

The review begins with a stakeholder analysis of the sector and these are presented fully in Appendices 1, 2 and 3. Key categories included in the analyses are: producer associations, cooperatives, commercial farmers, processors, traders and retailers, certifiers and inspection agencies, training and research institutions, national organic movements, NGO promoters, standards bureaus, government ministries, in particular agriculture, environment and trade, government export and investment promotion agencies, universities and other research institutions, and development partners - such as the donor organizations.

The current status of organic agricultural production is then presented and it is clear that the different histories in the three countries have led to different opportunities and pitfalls for the organic sectors. In each country the organic sector is comparatively small, but is growing rapidly and is of great interest to smallholder farmers (farming 1-3ha) who have predominantly used fewer inputs in their agricultural systems than the larger, estate type farms. Typically, organic agriculture in East Africa is founded on smallholder production and hence focuses on traditional commodity crops of the region such as coffee, tea, cocoa, cashew nuts and cotton. Other tropical, non-traditional crops have been added to these such as vanilla, sesame, tropical fruits, herbs and spices.

In all three countries women do 70 per cent of the agricultural work and provide the backbone of smallholder farmer production. Organic agriculture is practiced mainly within the smallholder farmer systems of the region. As smallholder farms enter commercial production it is identified that an opportunity for conflict arises as men see themselves “in-charge” of farm planning and perhaps the resulting cash crop, but the burden of the planting and crop care falls on women. With many organic projects being donor funded in their initial stages we see that gender equity is a cross cutting feature of their support and hence they have encouraged project stakeholders to promote a more balanced use of male and female labour within organic farming and processing systems.

Organic agriculture, with its smallholder, commercially orientated, production base, has enabled many thousands of rural families to find a secure income and through this find satisfying “self-employment”. Increased income at the household level has enabled families to build better houses, and cloth and educate their children.

Certified organic production is about marketing and trade and this has been one of the major aims of much non-government and foreign government based support directed towards the development of organic agriculture in all three countries. The Export Promotion of Organic Products from Africa (EPOPA) programme, which has done much to build the organic sector in Uganda and Tanzania, is a private sector intervention. Each of the national organic

associations has strong marketing components. The National Organic Agricultural Movement of Uganda (NOGAMU) has its own retail outlet and the Kenya Organic Agriculture Network (KOAN) has developed a dedicated organic marketing project called the Organic Marketing Assistance Programme (OMAP). The organic export trade in all three countries is dominated by the organic versions of the many of traditional cash crops heading towards the bulk food ingredients market. These are however, being increasingly supplemented by non-traditional and processed crops, such as dried tropical fruits, essential oils and vanilla, which generally have a higher value and a greater organic premium ranging from 20 to 300 per cent. The major export destination for all products is the European Union, although some go to the United States and the growing Middle East market.

The local market for organic produce in the region is small with most of the population having little money to pay for extra quality and holding a perception that much food in the local markets is “organic” anyway. However, in the capital cities organic products are being promoted through dedicated outlets such as the NOGAMU shop and increasingly through the larger supermarket chains. Sales through both of these outlets are growing due to increased awareness of the benefits of producing and eating better quality food, and a consumer perception that eating healthy organic foods can potentially alleviate some of the effects of HIV/AIDS.

In all three countries organic standards have been developed by the local organic movements. Although national representatives are often used to carry out inspections for international certification, the countries still rely on foreign certification bodies inspecting to EU, US and Japanese standards. In Uganda and Tanzania the national organic standards have been put to use for the organic certification of locally marketed organic products through UgoCert and TanCert. In all countries the national authorities for standards development have also taken a keen interest in the development of organic standards, although their approach to this has varied. In Kenya and Tanzania these standards authorities have developed their own standard, whereas in Uganda the UNBS has decided to participate in the development of, and eventually adopt the Uganda Organic Standard (UOS) as the authoritative standard.

In Tanzania, and more recently Uganda, government policy has recognized the role of organic agriculture. In Tanzania organic agriculture is mentioned within the national agricultural policy and in Uganda a policy drafting committee is currently working on an organic agriculture policy recommendation. In Kenya no official policy has yet been stated although some government ministries see a role for organic agriculture within the general government agricultural strategy. With the work of EPOPA and CBTF projects within the region, the opportunity for regional harmonization of organic policies and certification, especially with the development of the East African Community, seems promising.

Key recommendations of the study include: policy development to act as a recognized backbone to the sector; international certification completed at the local level so that costs are reduced and market access is improved; established regional standards to ease the demands of meeting international trade barriers; infrastructure development and tax incentives to encourage investment in organic production and marketing; research into production and social issues so that the farm level impact of organic agriculture can be strengthened; local and regional markets development; the fostering of regional cooperation to strengthen East Africa within a global context; increased investment in the organic sector from national governments; group certification focus to enable more efficient and equitable methods of

certification and increased value addition in the country of production.

A snapshot is valuable for detail, but at the end of the day only shows what the situation was at a particular moment. The organic sector in the East African region at the present time is quite fluid. With growing demand for organic products and opening of traditional trade barriers, the growing realisation of the contribution of organic production to the development of export and local trade, and the opportunity this gives to smallholder farmers to enter commercial agricultural production, the situation is constantly changing. As the CBTF project continues to progress, we can expect this regional overview to be developed and strengthened through further meetings and reports.

Table 1. Sector Summary Matrix

	Kenya	Tanzania	Uganda
General sector status	Organic started in early 80s with NGO training initiatives and then a few commercial companies. KOAN began in 2005	First organic garden in 1898 in Peramiho, but slow development due to government agricultural input assistance. TOAM started in 2004	From 1994 some commercial companies started organic exports. NGOs promote sustainable agriculture. NOGAMU formed in 2001
Development issues	OA, like conventional agriculture, has women as the main workers. Smallholder farms produce most organic produce and hence are a major employer. Land units range from 1 to 3ha. In reality most food is produced using organic – no input systems. Most people eat food produced from their farms and hence the close link between farm productivity and food security. Commercial organic farming provides extra income and better livelihood sustainability		
Marketing profile	OMAP supports organic trade. Main products are cold pressed oils, herbs, tropical fruits and vegetables. 10 organic outlets in Kenya and main supermarket sell organic products.	EPOPA supported five companies to start organic exports including nuts, coffee and cocoa. Local supermarkets stock organic food and health products	EPOPA, NOGAMU and CBI help develop exports of coffee, tropical fruits, cocoa, vanilla, etc. NOGAMU shop and supermarkets sell organic products.

Standards	<ul style="list-style-type: none"> - KOAN started working with KBS to develop Guidelines for Organic Production, Processing and Packaging. - Official government standard is awaiting finalization following public review. - KBS has also agreed to set up a structure that will accredit companies and organizations that wish to certify. 	<ul style="list-style-type: none"> - A standard for local markets was created by the Standards Committee (initiated by Pelum). - An export standard was developed by TanCert and is inline with IFOAM Standards. - The Tanzania Bureau of Standards (TBS) has also drafted a standard. TanCert participates in the TBS Technical Committee. 	<ul style="list-style-type: none"> - Uganda Organic Standard (UOS) developed by NOGAMU and UgoCert inline with the IFOAM Basic Standard. Adopted in 2004. - UNBS is considering adopting the UOS. - UgoCert in process of developing a standard for Sustainable Fisheries.
Certification	Almost all certified products in the region are certified according to the EU regulation (or US or Japan)		
	<p>Most active organizations are the Soil Association and EcoCert. AfriCert formed in 2003 and has been carrying out EUREPGAP certification.</p>	<p>Most Active organizations are IMO and EcoCert. TanCert certifies production to the TanCert Organic Standard; it aims for IFOAM accreditation in 2006.</p>	<p>The certifiers are IMO, Ecocert, Soil Association – majority IMO UgoCert was formalized in 2004 and is aiming for IFOAM accreditation in 2006.</p>
Government policy and regulation	<p>Has not formally recognized role of OA although Ministry of Environment has offered support. No organic market regulation.</p>	<p>Existing National Agricultural Policy has clauses on OA. No organic market regulation.</p>	<p>The Organic Policy Development Committee was created in 2003, in the MAAIF. No organic market regulation</p>
Harmonization	<p>EPOPA arranged a meeting in 2003 in order to work on a common regional standard and certification structure for the three countries. A process for regional standards was discussed. Progress since this meeting has been slow, as countries have focused on their own certification bodies. The CBTF project is now following up on the initial work, in cooperation with IFOAM.</p>		

1. Introduction

The following study has been commissioned by the United Nations Environment Programme (UNEP) and the United Nations Conference on Trade and Development (UNCTAD) Capacity Building Taskforce on Trade, Environment and Development (CBTF) for the project “Promoting Production and Trading Opportunities for Organic Agricultural Products in East Africa”. This comes at an opportune time with growing interest in organic agriculture being expressed by both government and civil society in the three countries, Kenya, the Republic of Tanzania and Uganda. Alastair Taylor, of the Agro Eco Consultancy – Uganda Branch, coordinated this overview of the status of organic agriculture in the East African Region via consultation with local organic movements in the three countries, namely: the Kenya Organic Agriculture Network (KOAN), the Tanzania Organic Agricultural Movement (TOAM) and the National Organic Agricultural Movement of Uganda (NOGAMU). Local experts associated with these three movements worked with national stakeholders to develop the information presented below. As time was limited and the information requested quite broad, this report should be viewed as a snapshot of the current situation of organic agriculture in East Africa as seen in mid-2005 and as a guide to the rest of the CBTF project as it seeks to find areas of harmony within the East African organic sector which can be used to strengthen the future development of the sector.

The study covers six main areas. Section Two presents a summary of the main stakeholders involved in the organic sector in the three countries. Section Three gives an overview of organic agriculture production in the three countries, including sector development, products, and issues related to gender, land tenure and poverty. Section Four looks at international and domestic market opportunities for East African organic products. Section Five provides an overview of organic regulations, policies and standards at the time of writing in mid-2005. At that time there were no regulations, at most a brief mention in policies, yet no less than six public and private sector organic standards. Section Six calls for regional cooperation to develop an East Africa Organic Standard. Section Seven highlights key challenges and makes recommendations to promote production and export of organic products in East Africa. The Appendices contain more detailed information on stakeholder analyses and organic production and exports in the region.

2. Stakeholder analysis

A stakeholder analysis for each of the three countries under consideration can be seen in Appendices 1, 2 and 3. Key categories included in the analyses are: producer associations, cooperatives, commercial farmers, processors, traders and retailers, certifiers and inspection agencies, training and research institutions, national organic movements, NGO promoters, standards bureaus, government ministries, particularly ministries of agriculture, environment and trade, government export and investment promotion agencies, universities and other research institutions and development partners, e.g. donor organizations.

It is interesting to note how broad the inclusion of stakeholders within the organic sector has been and how this broad scope is continuing to grow. Both local and international governments, together with civil society organizations, seem to be realizing the trade opportunities offered by organic agriculture, and the means of allowing resource-poor farmers to enter commercial production. This view is being strengthened by the growing number of research initiatives taking place, including those linking national universities with universities in developed countries such as the Universität für Bodenkultur Wien (BOKU) in Austria, Griffith University in Australia and Denison University in the United States.

As interest in the sector widens, the need for good coordination becomes even more important, in order to avoid any duplication of effort and to effectively meet the needs of the sector. National governments are taking an increasing interest and greater role in the sector, as can be seen later in the policy section of this paper. In Uganda, this initiative has been linked to the strong local organic movement, NOGAMU; in Kenya and Tanzania, however, the local organic movements, KOAN and TOAM, were formed less than two years ago. Although interest in their activities is growing rapidly, they still need to gain strength and influence at various levels.

3. Current status of organic agriculture production in East Africa

Each of the three East African countries has had quite a different history since independence, which has influenced the development of their organic agriculture sectors. In Kenya, colonial land occupation was common, especially in areas of high productivity, and larger farms were developed with an emphasis on high input agriculture. As a result many of these inputs were made available to surrounding smallholder producers. This was also true in many parts of Tanzania, but during the country's socialist period which saw government promotion of cooperative societies as a means of supporting farmers, many chemical inputs were introduced directly to smallholder farmers. In Uganda, colonial land occupation was never prolific and farm size therefore remained small, with smallholder farmers as the backbone of agricultural production. This situation is still largely reflected in the organic agricultural sector today in the three countries: in Kenya a few large commercial farms have led the way in export-orientated organic production, in Tanzania organic produce comes from smallholder farmers arranged in strong cooperative unions, and in Uganda organic production is dominated by smallholder farmers organized through private companies.

3.1 Organic development in Kenya, the United Republic of Tanzania and Uganda

3.1.1 Organic development in Kenya

Formal organic agriculture in Kenya dates back to the early 1980s when the first pioneer organic training institutions were established. At the same time, a few horticultural companies started growing organic vegetables for export. Initial efforts to promote organic agriculture in Kenya were made by rural development non-governmental organizations (NGOs), faith-based organizations, individuals and community-based organizations (CBOs), who sought to help rural farmers address the issues of declining agricultural productivity (especially the degradation of soils and the natural resource base), high poverty levels, food insecurity and low incomes, which prevented farmers accessing high cost inputs. Organic farming was seen as a low cost approach to mitigate the above situations. This “poor man” image of the organic sector, especially among NGOs, continues to this day and may have contributed to the low level of commercialization of the organic sector at the smallholder level.

The organic sector is relatively small but fast growing and led mainly by civil society organizations (CSOs) and the private sector (companies growing organic produce for export). The main objectives are to diversify production of food at the household level in a sustainable way and, at the same time, ensure ecological sustainability of the farming systems and increase household incomes through market access. The government has not yet recognized the role of organic agriculture through its policies and could increase efforts to promote the sector. Organic products — mainly vegetables and fruits produced on large-scale farms — have been exported from Kenya over the past two decades. Over the years, exports have developed beyond vegetables and fruits to include other products such as essential oils, dried herbs and spices, as well as products for the cosmetic and pharmaceutical industries which are more often produced or collected by smallholders.

Most smallholders are organized into groups and some of these are registered. Three years ago, some small-scale organic farmers formed a national representative organization, the Kenya

Organic Farmers Association (KOFA). Larger companies and commercial farmers who are already in the export market have organized themselves into the Kenya Organic Producers Association (KOPA). Last year, organic agriculture stakeholders in Kenya, including KOPA and KOFA, formed the umbrella network KOAN to support the successful growth of the sector.

There are four main international certifiers operating in Kenya, they are: the Soil Association (SA), EcoCert International, IMO (Institute for Marketecology) and Bio Suisse. There are currently over 180,000 hectares of land under organic certification for export markets, plus another 853 hectares in conversion. There is also a significant area soon to be in conversion for wild harvested products.

Table 2. Organic products produced in Kenya

Regions (Provinces)	Non-certified organic products	Certified organic products
Nairobi	Processing of dried fruit	Processing of cold pressed oils. Processing of vegetables.
Central	Fruits - avocados, mangoes, passion, apples, guava, pineapples, papaws. Coffee, vegetables (both exotic and indigenous), potatoes (Irish and sweet), water melon sweet melon, green peas, ginger, green pepper, okra.	Avocados and mangoes (in-conversion), coffee, vegetables (baby vegetables and salad vegetables), dried fruit, bird's eye chilli. Cane fruit.
Nyanza	Bananas, fruits, groundnuts, sesame, sugar cane, chillies, sorghum, millet.	Birdseye chillies.
Rift Valley	Honey, tea, fruits	Honey, black and herbal tea, dried culinary herbs and spices, essential oils, cold pressed oils, nutraceuticals, vegetables (baby vegetables and salad vegetables).
Eastern	Vegetables, fruits (mangoes, papaws and oranges), cassava, millet, sorghum, amaranth, medicinal plant products.	
North Eastern		Essential oils.
Western	Indigenous vegetables: amaranth, spider plant, saghert.	Pineapples.
Coast	Cashew nuts, ground nuts, turmeric, ginger.	Natural craft products as certified NTFP. ^a

^a Non Timber Forest Products, Forestry Stewardship Council certification and labeling

3.1.2 Organic development in Tanzania

Most farmers in Tanzania, both before and just after independence, were practicing low input agriculture, otherwise known as traditional farming, with a strong bias towards organic principles.

Immediately after independence the Tanzanian Government introduced a number of interventions that were aimed at speeding up rural and socio-economic development.

Enhancement of food security and raising household income were set as priorities. The interventions included the introduction and intensive use of industrial fertilizers, pesticides and hybrid seeds. In order to speed up early adoption of the use of these agricultural inputs the government introduced significant subsidies.

In following years, production increased tremendously with maize production reaching 20 – 30 bags per acre. However, with the passage of time, productivity began to decline which was attributed to, among others things, mismanagement of these agricultural inputs. Also the price of these inputs continued to rise due to the introduction of trade liberalization and privatization policies, which included agricultural input procurement and distribution. This increase led to a decline in the use of agricultural inputs and gave rise to an increase in crop pests and diseases.

Organic history goes back to September 1898 when the first organic garden was founded at Peramiho in southern Tanzania. Since it was started, the garden has been fertilized by stable manure, compost, wood ash and latterly green manure, thereby creating a foundation for permanent soil fertility (Bertram, 1997). In an effort to assist farmers to address the problems associated with production decline and increasing input prices, NGOs launched sustainable, organic and, in some cases, ecological farming initiatives. Most of these initiatives were based on practices and principles, which are today embedded in organic agriculture. The NGOs included: EGAJ, Inades Tanzania, Pelum, Sunnhemp Seed Bank, ADP-Mbozi and Kilimo Hai Tanzania (KIHATA). The projects included: SECAP-GTZ, Meatu Cotton Project, Hifadhi Mazingira (HIMA) and Babati Land Use Management Programme (LAMP) (see Appendix for details).

The Tanzania Organic Agriculture Movement (TOAM) is the umbrella organization for organic agriculture in Tanzania. KIHATA previously handled the organic sector but it didn't have full participation from all stakeholders therefore TOAM was established. In 2005 TOAM developed a strategy plan with five pillars to guide its future activities. TOAM has recently been involved in media conferences as well as a meeting with the Ministry of Agriculture, Food Security and Cooperatives to create a common understanding of organic agriculture.

Other institutions involved in organic agriculture include: Sokoine University, Agricultural and Livestock Training Institutes, Neem Botanical Research Station and Tengeru.

These developments have significantly contributed to the current status of certified organic production in Tanzania, which includes the following produce:

- Honey from Tabora, Iringa and Rufiji;
- Pineapple from Njombe in the Iringa region;
- Coffee from Bukoba and Kilimanjaro;
- Cashew nuts from Mkuranga in the coast region;
- Turmeric from Mbeya;
- Cocoa from Kyela;
- Ginger from Kigoma, Tanga, Morogoro and later Iringa;
- Tea from Njombe and Tanga;
- Cotton from Meatu;
- Various herbs and spices from Zanzibar; and
- Spices from the Kimango farm in Morogoro.

These products have been certified as organic by external certifiers such as IMO, EcoCert, KRAV, Soil Association and Bio-Inspecta. Once certified, these products are exported.

However, other products are also grown using organic principles but are not certified and tend to be consumed locally, sometimes without a price premium and therefore at the same price as the conventionally grown ones. Regardless, some producers are vying for certification so that they can penetrate the organic market, both locally through the larger supermarket chains, and to export their products.

3.1.3 Organic development in Uganda

The driving force behind the organic agricultural movement in Uganda is the export market. As early as 1994 a few commercial companies began deliberately engaging in organic agriculture, with an eye on the export market.

At the same time in Uganda, there was a general movement in the agricultural sector aimed at developing sustainable agriculture as a means of improving peoples' livelihoods. Many NGOs, CBOs and the government promoted an approach to agriculture which would allow for the safeguarding of food security, help to provide income, maintain soil fertility and control pests. From here, it was only a small step towards embracing organic agriculture, which, with its emphasis on nature, was found to be palatable to Ugandans.

Historically, Ugandans have had a great regard for nature and respect for nature is ingrained. Living in a symbiotic relationship with nature is stressed and cultural totems amongst the Ugandan peoples have meant that Ugandans grow up relating to their role within the natural order of things. No doubt this has contributed to their predisposition toward the practices of organic agriculture and helped facilitate the successful establishment of NOGAMU, which began in 2001, and by mid-2005 had attracted over 300 individual members and 80 corporate members. Many of the corporate NOGAMU members have membership in the thousands, meaning that NOGAMU is linked to 25,000 stakeholders in the organic sector.

NOGAMU works with a designated partner organization in different localities, thereby spreading its influence nationwide. In the north of the country, it works with the Lango Organic Farming Promotion, in the east, Students Partnership Worldwide, and in the west, the Sustainable Agriculture Trainers Network.

On the socio-economic front, NOGAMU has a deliberate policy of ensuring farmer influence on the directives and direction of the organization. The Central Committee is elected every two years by the members. Additionally, the four activity committees of marketing, training, lobbying/advocacy and organic standards, allow a further chance for farmer participation in the running of the organization.

On another level, NOGAMU has members representing both processors/exporters and producers. This degree of coordination within the organic sector in Uganda has allowed the organic agricultural movement in Uganda to:

- Lobby as a body against the proposed use of DDT by the Ministry of Health;
- Attend international trade fairs as a body, slowly carving out a solid reputation for Uganda in the international organics market;
- Lobby government for a policy on organic agriculture;

- Develop a training guide for the practice of organic agriculture in Uganda;
- Develop organic standards; and
- Be involved in the setting up of UgoCert, Uganda’s certifying body.

Table 3. Organic products currently exported from Uganda

Category	Type	Region
Fresh fruit	Pineapple	central Uganda
	Passion fruit	Highlands
	Banana	
	Pawpaw	
Fresh vegetables	Avocado	central Uganda
	Matooke	Highlands
Dried fruit	Pineapple	central Uganda
	Banana	northern Uganda
	Mango	
	Papaw	
Dried spice	Ginger	central Uganda
	Vanilla	Highlands
		Bundibudgyo
Coffee	Arabica	Highlands
	Robusta	central Uganda
Cocoa		central Uganda
		Bundibudgyo
Cotton lint		northern Uganda
		Kasese
Sesame	African mixed and white	northern Uganda
		West Nile
Chillies	Bird’s eye	northern Uganda
		Cotton areas

3.2 Gender, employment, poverty and land tenure

3.2.1 Gender

In Kenya over 70 per cent of agricultural activities are undertaken by women, especially in the small-scale producer sector. Exporting companies have tended to hire more women labourers for fieldwork and more men for packaging and processing operations. On a small scale, women mainly undertake the production, sometimes primary processing, and the marketing of organic produce/products at the national level. Men usually take charge of larger scale cash crop production and sale to informal and organized markets at both local and national levels (KOAN – informal discussions).

Smallholder management is, in large part, in the hands of men while a great deal of the farming work is executed by women. Due to these inequities, social and economic development in Tanzania has been, and continues to be, uneven. However, any attempt to improve the lot of women farmers through training and other means must be implemented sensitively and be aimed at the whole community, otherwise it risks actually worsening the women's lives.

Organic agriculture is an alternative source of income for many involved in the EPOPA project in Tanzania. Income is generated within communities through smallholder farmers who sell their products to the operators and through casual labourers who perform various processing operations.

Women in the region are in general more prone to poverty and unemployment. Organic agriculture projects in the region have therefore adopted a policy of promoting women and employing them in various operations. Almost 100 per cent of casual labourers in various processing operations are women. This stance has tremendous impact on the social status of women in communities and is an added input for the poverty reduction policy of the country which can improve family livelihoods.

Future organic agriculture projects should support social services in areas such as improvement of water facilities, provision of support materials for local storage facilities and housing. The projects currently linked to the EPOPA programme are requested to incorporate HIV/AIDS programmes into their working methods.

In Uganda organic farming is practiced on smallholder farms, where the majority of work is carried out by the women, supported by other family members. The family owns the land, with direct ownership held generally by the man. The monetary benefits resulting from the farm are controlled by the men, especially where a cash crop such as coffee is being produced. If a farm is organically certified it is normally registered in the name of the man (NOGAMU/SATNET, 2004).

Research is already being carried out in Uganda on the social implications of certified and non-certified organic agriculture through the 'Linking Farmers to Markets' initiative being spearheaded by the International Center of Tropical Agriculture (CIAT), Makerere University, Kampala and BOKU University, Austria. More research needs to be carried out in this area to show how organic agriculture benefits resource poor households, especially in regard to women and children and whether commercializing smallholder farmers really leads to a decrease in poverty, or whether the man of the household is the sole beneficiary of the extra income.

3.2.2 Employment

It is difficult to determine how many people are directly employed by organic agriculture, especially small-scale farmers, as the sector is extensive, largely informal and has been evolving over a long period of time (more than 20 years). Even information about the employment levels of large-scale producers, who export both certified and non-certified products, is difficult to establish. Information provided by KOPA member companies indicates that between 30 and 1,200 staff members are employed per company. Uganda has over 39,000 households certified as organic, the majority of which have organic cash crops as their major source of income. In this regard, commercial organic agriculture can be seen as an important source of employment and an employment opportunity.

3.2.3 Poverty and Land Tenure

Land units of small-scale producers range between 1 and 3 hectares on average, whereas for medium-scale producers land units range between 3 to 15 hectares. Large-scale producers may cultivate from 15 hectares of land for intensive production to 100,000 hectares for extensive production – mainly grazing. Most small-scale farmers are faced with food insecurity and their main objective is to set food on the table every day. Informal indications show that compared to other families, organic producers are more food secure and are able to sell excess produce, enabling them to educate and clothe their children better than other farmers.

The contribution of organic agriculture to GDP is also difficult to ascertain, as the export councils in the three countries make no distinction between organic exports and non-organic exports. In Uganda the contribution of the organic agriculture sector to overall export competitiveness has been recognized by the Uganda Export Promotion Board through the designation of the “Best Organic Exporter” category among the prize categories of the Presidential Awards for Export Excellence.

What is not at doubt is that organic production is largely feeding the three countries as the majority of people, especially those living outside large conurbations, eat mostly from their own gardens. And being commonly averse to applying artificial inputs to their own food crops, they mainly eat naturally, organically produced food.

The link between poverty reduction and the practice of organic agriculture was recognized in the early 1990s when the Swedish International Development Agency (SIDA¹) launched its EPOPA programme in Uganda and Tanzania. The link between organic agriculture and poverty reduction is becoming increasingly recognized with a push towards commercializing smallholder farmers and support for their access to markets from a number of major donors and all national governments.

¹ This agency is now called the Swedish International Development Cooperation Agency (Sida).

4. Trade in organic agriculture in East Africa

Below is a narrative background on organic trade in each of the three East African countries. In all cases the export sector is dominated by larger companies, both local and international, who have entered into organic trade to supplement their existing trade in conventional products. Most provide bulk raw materials to developed markets, although some carry out primary processing before export. The exceptions are fresh fruit exporters, dried fruit exporters and companies dealing in essential oils and aromatic plants, where end market products are being exported. The statistics behind the narratives can be seen in Appendices 3, 4 and 5.

4.1.1 Marketing initiatives in Kenya

Several marketing initiatives are aimed at supporting the development of the organic industry; the main focal initiative is the Organic Marketing Assistance Programme (OMAP), a facility developed within KOAN. The Sustainable Agriculture Community Development Programme (SACDEP) and the Resource Oriented Development Initiative (RODI) have added a market development component to their core organic projects. The Catholic Diocese of Nakuru is currently setting up an Organic and Natural Products Unit to support the development of organic marketing within their project activities. The Centre for Development Enterprises (CDE) is also providing small amounts of market development support for organic operators, while the International Trade Centre (ITC) has developed a website facility for eastern and southern Africa. The Centre for the Promotion of Imports from Developing Countries (CBI) — a Dutch program facilitated by the Dutch Ministry of Foreign Affairs — is also supporting trade fair participation.

The Central, Western and Nyanza Provinces, together with some parts of the Rift Valley, have higher potential for agricultural production and have a wider variety of crops compared to other regions. Whereas the eastern parts of the Rift Valley and North-eastern Province have a higher potential for wild harvests, the Central Province has the most certified organic farms in terms of acreage. It is difficult to determine the extent of uncertified organic production in Kenya. A very high number of farmers have been trained in organic agriculture but the sector is largely informal and not certified. Most farmers in Kenya produce crops under natural production methods, i.e. not using artificial inputs due to economic conditions and cultural interests.

The best trade opportunities are high value and value-added products, including organic honey, coffee, nuts and oil seeds, fresh vegetables, herbs and spices, essential and pressed oils, indigenous plant materials and extracts for flavouring, fragrance, cosmetic/body care and nutraceutical industries.

These opportunities are of particular relevance to producers in Kenya as international freight costs are comparatively high and labour costs are relatively low. Importance is also being attached by the development sector to high value crop production for small-scale farmers and producer group operations due to rising land pressure and numbers of single headed households caused by the escalating HIV/AIDS epidemic. These products, which include ethno-botanicals, essential oils, herbs and spices, cosmetic and body product ingredients, are the fastest growing sector of the international organic market place.

A growing number of certified organic producers and exporters are now expanding into these high value and value-added product sectors due to the unique opportunities they provide. Many of the companies have already reached an export position and others have the capacity and product quality to begin export development. It is, therefore, important that the companies have a direct contact and a sound understanding of the marketplace in order to tailor their

exports to suit exact requirements and trends. Producers also require technical support in product development, market information (market demand, prices and market characteristics) and sustainable, market linkages based on ethical or fair trade standards. KOAN is currently developing these services through OMAP, a marketing facility.

Price premiums for organic products on the international market, as compared to conventional products, range between 15 per cent for certified fresh vegetables to 300 per cent for some essential oils, cold pressed oils, honey and dried herbs and spices. Coffee and tea range between 25 and 30 per cent premiums and confectionary nuts and fruit attract around 50 to 80 per cent premiums.

4.1.2 Marketing initiatives in Tanzania

Currently the cost of the certification process is paid by the exporters of the organic produce, and most of the produce is exported to European countries.

Operators participate in both local and international trade fairs as a way to identify new customers and raise awareness of the value of organic produce for consumer health and prosperity.

Since 1996 the EPOPA programme has assisted about five projects to penetrate the export market by providing assistance to groups and individuals with the certification process and market identification. Some of these projects have concerned the production of cocoa in Kyela, instant coffee in Kagera and pineapple from Njombe.

4.1.3 Marketing initiatives in Uganda

Processors and exporters are playing an increasing role in NOGAMU as the marketing arm of the organization goes from strength to strength.

NOGAMU is in the process of setting up an Organic Trade Point in order to promote the penetration of organic goods from Uganda into international markets. The purpose of this Organic Trade Point is to provide a one-stop point for providing organic market information and a focal point for organized penetration of the international market by the organic sector. It will also provide information on product availability to interested international buyers.

Uganda's penetration of the international organic markets has up to now relied heavily on the support of programmes such as EPOPA and CBI.

EPOPA has worked closely with a number of Ugandan organic exporters, allowing them to increase their level of international competitiveness, which has translated into increased organic exports from Uganda. CBI has primarily played the role of assisting in various matters of access to the EU market.

Non-tariff measures are also an important factor in the penetration of the EU Market, which is the leading destination for Uganda's exports. NOGAMU has instigated a measure amongst organic dried fruit processors to adequately ensure their standards of hygiene and sanitation. Working with Makerere University, NOGAMU has embarked on a series of training programs, including the deployment of graduate interns to dried fruit processing facilities. The United Nations Industrial Development Organization (UNIDO) is currently writing, with contributions from NOGAMU, a curriculum on sanitation and hygiene standards for processors of dried fruit.

Table 4. Farm gate prices in Uganda for a range of organic and conventional crops, 2005

Product	Organic price (sch) per kg	Conventional price (sch) per kg
Pineapple	400-500	100-200
Apple banana	250	100
Passion fruit	1000	400-700
Ginger	2000-2500	1000-2000
Robusta dry cherry	600	450
Cotton	450	350
Sesame	1100	900-1000
Vanilla	5000-7000	2000-3000
Cocoa	1500	800

US\$1 = 1,710 Uganda Shillings

4.2 Local market opportunities

4.2.1 Local market in Kenya

The Kenyan domestic organic market is expanding rapidly. Currently there are ten retail outlets in Nairobi and others scattered in the main towns in Kenya that are selling organic products. One supermarket chain, Nakumatt, has started recognizing organic products by placing organic fruits and vegetables on distinct stands within their fresh produce sections. There are also more than 50 herbal clinics scattered in the country which are also promoting healthy eating through organic diets.

A survey of self-proclaimed organic retail outlets showed the absence of certified organic products as most labelling of products was informal. ‘Certified organic’ products are usually few and most of them come from outside of the country, mainly from Europe. National price premiums rarely exist due to the lack of perception of the value of organic and the lack of certification and labelling. Price premiums at the national level come mainly as a result of better quality and improved presentation of a product rather than its perceived organic status. However, growing concerns about health issues are creating a growing demand for organic products as they are thought to have a positive impact on health.

Amongst the many initiatives in Kenya to develop organic farming there are only a few that have focused their efforts on developing national markets. The following provides an indication of the main strategies in operation at this time:

- Training of NGO and CBO staff in order to change their training approach from food security and kitchen gardening approach to organic farming for the marketplace.
- Facilitating organic certification for the local market by a local certifying body (Encert)

through pre-certification assessment of producers and producer groups, information dissemination, professional advice on production, pest and disease control and market development.

- Providing market linkages for producers and producer groups with retail outlets.
- Mapping out the organic farming opportunities and presenting them to organic food marketers, retailers and the government.
- Streamlining and strengthening the Kenya Organic Farmers Association (KOFA) as a body representing smallholder organic farmers in Kenya.
- Facilitating networking of all the producers, promoters, trainers, processors marketers and retailers in order to streamline the organic sector and create linkages between all the players.

4.2.2 Local market in Tanzania

There is increasing awareness of organic produce in Tanzania. Demand has consequently been increasing steadily. This is in part due to the ravages of HIV/AIDS. Tanzanians are becoming more health-conscious and increasing awareness of the benefits of organic produce has led to a demand for commodities such as organic brown rice, organic legumes, honey, and others. Local supermarkets such as Shoprite and Imalaseko are keen to meet this demand. A weekly box-supply system is being trialled in cities such as Dodoma and Dar es Salaam, whereby a week's worth of organic produce is supplied to households at a time. In addition there is great interest in organic toiletries such as soap, shampoo and various skin creams, with small-scale manufacturers operating both in the local and export markets. Consumers are also interested in purchasing organic eggs and other poultry products due to their better taste and peoples' fear of eating animals which have been intensively raised.

4.2.3 Local market in Uganda

NOGAMU has a shop located in a suburb of Kampala, through which its membership can access the local market. Further local marketing efforts by Uganda's organic movement have resulted in some producers being able to supply local supermarkets with organic goods.

NOGAMU established its shop for organic products in Kampala in 2001. The shop has grown with monthly sales rising from Ugandan Shillings (UGS) 170,000 in January 2003 to some UGS2,000,000 in December 2004 and over UGS3,000,000 in December 2005. Thus local sales have grown by 50 per cent in 2005. At the end of 2005, customer visits averaged 110 per week (up from 50 per week in early 2005), and volumes of home deliveries averaged 850Kg (17 baskets per week) up from 150Kg earlier in the year. NOGAMU also has three contracts for supplies to schools and restaurants. Some 60 per cent of the products sold through the NOGAMU shop are certified and 40 per cent non-certified but guaranteed through the NOGAMU initiative.

Although certified organic sales remain relatively low compared to the conventional domestic market, there are projections that they will increase from the current status of less than 1 per cent to over 10 per cent in the next five years. Organic producers are currently receiving higher prices than suppliers of conventional products, especially with fresh vegetables where domestic market suppliers are getting organic price premiums ranging from 30 to 50 per

cent. In addition, demand for uncertified organic products is strong and growing. The organic quality of these is often guaranteed in a participatory manner, instead of through third party certification.

The organic products in greatest demand from the NOGAMU shop are fresh vegetables, fresh and dried fruits, spices, fruit juice concentrates, ready to drink juices, free range eggs, vegetable oils and Shea nut butter.

There are plans to expand the number of NOGAMU shop outlets, both within Kampala and up-country, perhaps working on a franchise basis with local entrepreneurs. Organic products, such as dried fruit, honey and muesli, are also beginning to appear on the shelves of the large supermarket chains, including Uchumi and Shoprite.

5. Regulations and standards for organic agriculture

5.1 Organic standards

Almost all certified organic production in Kenya, Tanzania and Uganda is certified according to the EU regulation 2092/9.² Increasingly, as producers target more distant markets, production is also certified according to the US National Organic Program (NOP), or the organic standards of Japan Agriculture Standards (JAS). It is quite apparent that the direct use of these standards in East Africa is problematic to say the least. For example, the NOP has such stringent requirements for composting that even US farmers have problems following them, while the EU's requirement regarding the use of organic seeds is difficult to apply as there are almost no organic seeds available in East Africa. It is therefore quite natural that stakeholders look for an organic standard that is better adapted to their situation. At the same time few stakeholders understand export market regulations adequately enough to properly grasp the limited potential for national or regional standards for international trade. This limitation stems from the current reality that in order to gain acceptance in the export market, producers must follow international standards. To date, the potential to get acceptance for a national standard in the United States, European Union and Japan has been limited.

5.1.1 Standards development in Kenya

The Kenya Institute of Organic Farming (KIOF) developed a local organic standard for Kenya many years ago and that standard was used to further develop a Kenyan standard. During 2004, KOAN developed its own set of organic standards. The Kenya Bureau of Standards (KBS) also entered the arena and formed a "Technical Committee on Organic Foods". The remit of this committee was to develop a set of organic standards for Kenya. KBS is a statutory governmental organization that develops national standards on various issues (water, food and other products)

KOAN has been involved in the development of KBS standards through the involvement of the chairman of the KBS Technical Committee in the KOAN Certification sub-Committee. The chairman of the KOAN Certification sub-Committee is also a member of the KBS Technical Committee, and both were very much involved in developing KOAN standards.

The KBS organic standards/guidelines have reached the public review stage (DKS 1928:2004) where the public is able to comment on the standards. To this effect, KOAN organized a public forum on 17 June 2005 for discussion and comments on the standards.

The deadline for the public to comment on the standards was 8 July 2005. The technical committee then discussed comments received and changed the document accordingly. It was initially hoped that the finalized document would then be published as an official government standard in August 2005. Although the standards have not yet been gazetted, the process is in the final stages³.

Once the KBS standards are ready KOAN will apply to the KBS to have their standards approved/accredited for use in Kenya. KBS has agreed to set up a structure that will accredit other organizations or companies that may wish to certify growers.

2 The EU regulation that defines the standards and inspection measures for any product sold as organic within the European Union.

3 Since the original time of writing, the standard has been gazetted.

5.1.2 Standards development in Tanzania

In 2002, the NGO ‘Participatory Ecological Land Use Management Tanzania’ (PELUM) organized a meeting to initiate the process of setting up standards and certification. A task force and two committees were formed, one of which, the Standards Committee, had the task of developing a simple standard for the local Tanzanian Market (“short standard”) and a standard for the export market production sector. The underlying assumption was that the requirements for export are too hard for many small producers to fulfill, for example in relation to the need for conversion periods, document-keeping requirements and the use of organic seeds. The short standards are reduced to the most essential standards and can be more easily understood by producers, especially when compared to the much more complex export standards. After many meetings and stakeholder consultations the standards for the local market were first approved in December 2003. Initially, only plant production and processing were included in the standard, but since that time sections on animal husbandry and beekeeping have been added.

There is also the TanCert Organic Standard, which is intended for the export market. This standard has also been developed through intensive consultations with stakeholders. The TanCert Organic Standard is similar to the Uganda Organic Standard (UOS) and they are both based on the IFOAM Basic Standards. The TanCert Organic Standard was first approved by the TanCert Board in July 2004 and is owned by TanCert. The stakeholder process was supported by the Sida-funded EPOPA programme, which also provided technical advice for the standards development.

The TanCert Standards Committee consists of representatives from the sector, including the Ministry of Agriculture and Fisheries and the Tanzania Bureau of Standards (TBS).

The TBS set up a committee for a Tanzanian standard for organic production at the beginning of 2005. The relationship between this standard and the TanCert standard is not clear. Representatives from TanCert participate in the TBS technical committee and the first draft was circulated in June 2005.

5.1.3 Standards development in Uganda

In Uganda, NOGAMU took the initiative in 2002 to develop a standard for organic production - the Uganda Organic Standard (UOS). The Standards Committee consisted of representatives from NOGAMU, the Uganda National Bureau of Standards (UNBS), and the Ministry of Agriculture, Animal Industries and Fisheries (MAAIF), among others.

The process of drafting the UOS involved the preparation and distribution of three drafts for written and oral comment. A major stakeholder meeting was held in Kampala on 16 April 2003, which involved around 100 participants, NOGAMU also arranged a number of regional consultation meetings. There were several comments arising from the meetings, which the Standards Committee discussed and incorporated into the drafts. The standards were adopted in 2004. The stakeholder process was supported by the Sida-funded EPOPA programme, which also provided technical advice to the standards development.

The UOS is based on the IFOAM Basic Standard with adaptations to local conditions. It is quite elaborate and detailed, covering over 40 pages. The scope of the certification section includes crop production, wild production, animal husbandry and processing. The UOS is jointly owned by NOGAMU and Uganda Organic Certification Services (UgoCert). UNBS

Representatives have also been involved in the development of the UOS, and have indicated that they could consider recognition or adoption of the UOS if needed.

The UOS does not include fisheries and there is not currently an appropriate freshwater standard for Uganda. However, EPOPA is supporting an organic fish project and is currently working with UgoCert to develop a standard for Sustainable Fisheries.

5.2 Organic certification in East Africa

5.2.1 Certification development in Kenya

Certified organic production has existed in Kenya for many years. The most active certification organizations in Kenya are the Soil Association and EcoCert. In 1997 the Association for Better Land Husbandry (ABLH), a local NGO, in collaboration with the Soil Association began providing certification services. However, after three years the collaboration came to an end. In 2001, ABLH approached the UK-based Organic Food Federation (OFF) to continue with the project, which they accepted, but the work never took off. ABLH is no longer involved in certification.

Through the initiative of the research institute at the International Centre for Insects Physiology and Ecology (ICIPE), a company, AfriCert Ltd, was formed in 2003 to carry out certification services mainly for agricultural production and processing systems. The immediate task for AfriCert was to address certification needs for organic production and processing, and EUREPGAP standards for fruits and vegetables. To date, AfriCert has mainly carried out EUREPGAP certification. AfriCert has two full-time members of staff and has received training in EUREPGAP certification and participated in organic inspection trainings organized within the EPOPA framework. AfriCert has achieved ISO 65 accreditation, which is one step towards getting international recognition for its organic certification.

Simultaneously, KOAN has discussed the need to develop a simplified certification system for the domestic market, as it considers the requirements for accredited third-party certification to be too onerous for small-scale farmers.

Table 5. Local inspectors for organic agriculture (2002)

Country	EcoCert	SACert	IMO	SGS	KRAV	SKAL	BDOCO	Afrisco
					(KKAB)			
Kenya		2						
Tanzania			2		1			
Madagascar	2							
Mozambique					2			
Uganda			1		3	1		
Zambia								
Zimbabwe	1							3
South Africa				1		1	1	7

Source: Grolink (2002)

5.2.2 Certification development in Tanzania

In Tanzania organic certification has taken place since the mid-1990s. Currently there are four foreign organizations offering certification in Tanzania: IMO, EcoCert, Bio Inspecta and the Soil Association; IMO has the most clients. A few Tanzanians have been trained and work as local inspectors to the foreign bodies. IMO also has an expatriate inspector in Tanzania. Since the end of 2004, IMO has worked in close cooperation with TanCert and TanCert inspectors are increasingly performing inspections for IMO.

In 2001, through the initiative of PELUM Tanzania and KIHATA, a stakeholder meeting was called which resulted in the idea of forming a local certification organization. This aim was realized in October, 2003 when TanCert - Tanzania Organic Certification Association was founded. It is legally registered as an association and certifies production according to the TanCert Organic Standards as well as to the local standard (see above). It has an office in Dar es Salaam with three staff and a pool of trained inspectors. TanCert has not yet gained independent international recognition, but aims for IFOAM Accreditation during 2006. In the meantime, clients are offered internationally compatible certification mainly through an agreement with IMO. TanCert has received substantial financial and technical support from the EPOPA program.

5.2.3 Certification development in Uganda

Organic certification has taken place in Uganda since 1993. IMO and KRAV have dominated the certification scene with some projects also certified by EcoCert, the Soil Association and SKAL. IMO currently certifies the vast majority of production and a few projects are certified by EcoCert. In 1994, a few local inspectors were trained by KRAV, but much of the inspection work so far has been done by foreigners. IMO has an expatriate inspector based in Uganda, and since 2004 has worked in close cooperation with UgoCert (see below) for its inspections.

Parallel to the process of development of the UOS, there was also a process to develop a local certification body, which has been pioneered by NOGAMU, supported by the EPOPA programme. EPOPA also conducted a number of inspection trainings to start to build capacity and later on trained certification staff. UgoCert was formalized in early 2004 and is a limited company with stockholders from the organic sector. NOGAMU has the biggest share allocation. UgoCert has an office in Kampala and three staff. There are a large number of people trained as inspectors, but only a handful are both performing to the required standard and readily available for inspection services. As a result of problems experienced with staff contracted on a daily basis, UgoCert is moving towards employing full-time inspectors. UgoCert has received financial and technical support from the EPOPA program. UgoCert has not yet had any independent international recognition, but aims for IFOAM Accreditation during 2006. In the meantime, clients are offered internationally compatible certification mainly through an agreement with IMO.

5.3 Regulations

There are currently no organic market regulations in any of the East African Countries. In Kenya and Tanzania, the process to develop governmental standards for organic farming can be seen as a step in the direction of regulating the sector. While there are some arguments in favour of government regulation, there are also arguments against. Experiences from developed countries do not support the supposition that a regulation is essential for market

development. Using regulations to protect local service providers also rarely works. In the worst case scenario, it may result in foreign certifiers being denied access to the market before the local certification body is able to provide certification for exports, thereby creating a situation where nobody has gained and the producers have lost. In most cases a regulation does improve the sector's image and credibility as it acknowledges its relevance, but such an acknowledgement could also take place by introducing organic agriculture in policies, programs, curricula and plans in the agriculture sector.

5.4 Organic policy development

While organic agriculture is referenced in the Tanzanian policy on agriculture, neither Kenya nor Uganda has integrated organic agriculture into their main agriculture policies. Official policies and programmes discriminate against organic production. An example of this situation is farm input support schemes being available only to conventional farmers, leading to the situation whereby organic farmers who do not benefit from the subsidies are, in effect, subsidizing their conventional colleagues. There are also other policies and programmes that may pose a threat to organic farming, for example, the proposals to roll out large-scale DDT spraying in Uganda.⁴ Over the past few years organic farming has attracted increased attention from national governments, as an interesting export market option and as a low-cost, environmentally-friendly farming system accessible for small-scale farmers.

5.4.1 Policy development in Kenya

There are no official policies for organic agriculture in Kenya, even though there is increasing public interest and recognition of organic agriculture as can be seen from the box below:

“Assistant Minister for the Environment, Prof. Wangari Maathai expressed that organic agriculture ensures agricultural biodiversity, which is essential for food security, and sustainable agricultural development. Organic agriculture promotes environmentally, socially and economically sound production of food and fibres. The Minister highlighted that organic systems eliminated reliance on external farm inputs and any possibility of poisoning from powerful agro-chemicals for both humans and livestock.

The Hon. Minister was impressed with the market opportunities for wild harvest products and non-timber products and with sustainable harvesting of these products, and that farmers can earn premium profits, improve their livelihoods, and at the same time conserve our biodiversity.

Prof. Wangari Maathai finished by saying that the government recognizes the advantages of organic agriculture and is willing to support it. In particular it is committed to developing the three critical areas of organic agriculture, i.e. certification, extension and information exchange and marketing. She extended her personal assistance to anyone wishing to reach government policymakers and to develop suitable policies to guide and expand the sector.” Summary of speech given at the ‘Grow for the Future’ workshop held on 23-27 March 2004 at ICIPE Campus. The report of this workshop can be downloaded from KOAN website: <http://www.koan.co.ke/Reports.htm>

⁴ DDT is supposed to be sprayed inside the houses. Many farmers, however, store their produce in their homes, which may therefore lead to contamination.

The organic sector has developed without any official government policy support. Past attempts by ABLH, KIOF and other interested parties to get the government to act have received a cold reception. Despite this, the sector has benefited indirectly from two main government policies. Firstly, the NGO Coordinating Act (1990) which recognizes the work of NGOs as co-workers in rural development and secondly, the economic liberalization policies of the late 1980s and early 1990s, which created an environment for free enterprise. Indirectly, these created a favourable environment for the development of the organic industry, and the sector has been able to exploit these policy opportunities.

KOAN believes that the organic sector cannot develop its full potential without government support. Among the issues that require tacit government support are curriculum development, harmonization, validation of organic research findings by the government research authorities, and mainstreaming of organic agriculture into the conventional agricultural extension system.

5.4.2 Policy development in Tanzania

The existing National Agricultural Policy has clauses on organic agriculture. That is to say there is no separate policy on organic agriculture in the country. The recognition of organic agriculture in the national policy has created an enabling environment for stakeholders to continue with organic production in the country.

The formation of TanCert was followed by the establishment of the Tanzania Organic Agriculture Movement (TOAM) in June 2005. TOAM aims to unify stakeholders in organic agriculture within the country. The movement will be responsible for policy formulation, advocacy, and marketing, information and documentation and information dissemination.

In Tanzania some research institutions are already conducting studies and experiments on organic practices, especially on medicinal plants and their efficacy and safety. Other research is being conducted on the impact of organic farming on socio-economic development. However, this is limited in scale due to the shortage of funding and other resource limitations. NGOs and other organizations involved in organic projects, are conducting some elementary research at the grassroots level in the course of project implementation. In some cases these groups make use of research expertise through participatory research or farmer managed research in project implementation.

5.4.3 Policy development in Uganda

The Organic Policy Development committee was created in 2003 in the Ministry of Agriculture Animal Industry and Fisheries. However, its work has been slow and laboured. A presentation on the current status of organic agriculture in Uganda was given during a workshop held between 31 March and 1 April 2005 in Seeta. Issues were identified and a smaller working committee was established to compile background papers on various areas of organic agriculture, from which a concept paper would be compiled. The concept paper would then be presented to the top management in the Ministry of Agriculture and would form the basis for the draft policy. This would then be presented to Cabinet and a bill would then be sent to Parliament for consideration and final approval. The process has been slow, mainly due to lack of funds to facilitate the policy drafting committee. On 17 June 2005, the sub-committee presented the concept paper to the main Organic Policy Committee during a workshop. This presented an opportunity to make comments and adjustments in the concept paper. It was also agreed that ministry officials on the policy committee will incorporate the

changes in the concept paper by 15 July 2005. The committee has also published a small booklet presenting the urgent need for an organic policy, which was coordinated by the Ugandan NGO, Advocates Coalition on Development and the Environment (ACODE).

The Uganda Export Promotion Board (UEPB) has taken a keen interest in organic exports for many years and has supported participation in trade fairs and trade missions. The Uganda Coffee Development Authority has also recognized the importance of organic farming and established a target of 10 per cent certified organic coffee. It hosted the third IFOAM Coffee Conference in Uganda in October 2004.

6. Harmonization and regional cooperation

Until mid 2005, only the private sector was engaged in any regional cooperation on organic agriculture, including in the area of organic standards⁵.

6.1 Regional cooperation on organic standards and certification

At the end of 2003, EPOPA arranged a meeting in Arusha, Tanzania, on standards and certification of organic agriculture for East Africa. Almost 100 people from Uganda, Tanzania and Kenya met for three days to present the situation in the different countries and to discuss the way forward. One of the outcomes was a decision to cooperate on standards and certification for East Africa.⁶ One common regional standard such as a logo presenting national identity in the text and one regional certification structure was seen as the goal.

At the Arusha meeting it was also evident that in Uganda and Tanzania certification bodies (UgoCert and Tancert) were being formed and the stakeholders in the respective countries promoted and supported this development. For Kenya the picture was more diverse. The Kenyan representatives formed a working group to form a national organization for organic farming (the Kenya Organic Working Group), which later played a role in the establishment of KOAN. A regional working group was appointed by the Arusha meeting.

The working group, with representatives from KOAN, AfriCert, UgoCert, NOGAMU and TanCert met in Nairobi in March 2004, to follow up the decisions from the Arusha meeting. Areas of collaboration were discussed and the harmonization of the certification standards was seen as the starting point. As Kenya was not ready to participate, it was decided that they had to first settle the national level of standard. The standards in Uganda and Tanzania could function as a base for the Kenyan work. The next step would be to harmonize the inspection procedures and develop a common brand for East African organics.

The next meeting was held in Nairobi on 26 September 2004. The Kenyan standard setting process had been slower than expected and there was still no Kenyan standard to align with the other two standards. A process for regional standards setting was discussed and all participants were asked to reflect on the discussion and make further comments. TanCert had also brought a proposal for a joint logo and the representatives of the other countries were asked to also bring proposals for logos. The further financing of the regional cooperation was discussed. EPOPA had so far financed the meetings, as well as consultancy input but more funds were needed for future cooperation.

In addition to cooperation on standards, there have been a number of joint trainings for inspectors within the EPOPA programme. EPOPA and the Coffee Support Network recently organized an internal control system (ICS) consultant and inspection training in Uganda for both organic and Utz Kapeh (a EurepGap style scheme for coffee) ICS. The managers of UgoCert and TanCert have also participated in training sessions in Sweden, as well as joint promotional campaigns at the Biofach fair in 2004 and 2005. The joint training sessions could lead to the implementation of very similar systems, which in turn are easily harmonized.

5 Since the launching of the CBTF project for which this study was commissioned, the three Governments are also now involved.

6 More information can be found on the website: <http://www.epopa.info>

6.2 An East African organic standard

The initiative described above clearly supports the development of a regional organic standard. There are many reasons to favour a regional standard. One major advantage of regional standards is that they will facilitate regional trade as technical barriers will be lifted. Another advantage is that, rather than having to seek acceptance for each individual national standard, countries can work together to have a regional standard accepted by international export markets. Inspection, training materials and information efforts can be shared more easily if based on the same standards.

What remains to be seen is who should control and ‘own’ the regional standard. Globally, organic standards are either set by private organizations or governments. When set by governments they become ‘embedded’ in regulations. In only very few countries, such as Canada and a few Latin American countries, have national standards bodies been involved. The standards bodies in East Africa are in a very strong position to be involved in regional standard setting due to their involvement in the organic standard development process, and the fact that there are now tabled organic standards in Kenya, Tanzania and Uganda. A common regional standard under the East African Community might prove to be a feasible option. In fact, the option has already been discussed by stakeholders but the mechanisms and procedures involved need to be further explored and considered. The other option is that the regional standards remain in the hands of the non-governmental stakeholders who already initiated the process.

Regardless of the ultimate “owner” of the standard, it is important that stakeholders are involved. Another important aspect to consider is that any regional standard is likely to need quite frequent revision, especially initially, both to cater for feedback from the practitioners, as well as to “negotiate” standards for international recognition. The standards revision process must therefore not be too cumbersome.

We also need to consider the extent to which the standards would serve local and regional trade, or whether the primary objective will be to facilitate exports. If it is the latter, then it is important to assess the reality of international recognition of an East African Standard and the benefits that could be drawn from it. An alternative to international recognition would be to ensure that producers obtain certification in the importing country. Stakeholders must be aware that any process to get international recognition is time and resource consuming and that success is not guaranteed. In addition, some aspects of conformity assessment (i.e. certification and accreditation requirements) for exports might prove more limiting than the standards *per se*.

7. Challenges and Recommendations

Through the above section, a number of issues have been raised that offer themselves as either challenges or opportunities for the development of the organic sector in Eastern Africa. These are summarized in the following table:

Table 6a. Challenges for organic agriculture in East Africa

Challenges
<ul style="list-style-type: none"> • Inadequate knowledge of organic techniques by farmers and limited availability of high quality advice on organic production and marketing • No government policy for organic agriculture and harmful policies, such as government tax policies which do not favour local, small-scale, producers and processors • No clear message from the governments about GMOs and other threats to the organic sector • Increasing population has led to uneconomic land units in some areas • NGO extension support has focused on organic production for food rather than organic production for income • Organic certification is carried out by expensive external bodies • Internal control systems are expensive for producer groups to organize and require substantial human resources • Utility prices and transport costs are high in the region, in particular, high freight costs in Uganda and inland Tanzania • Product supply and demand is very seasonal as most agriculture is rain fed; producer supply, in particular, has at times been variable due to climate, pests and local market competition • The export market is dominated by raw material supply rather than retail products, and is therefore subject to considerable price variation • Exposure to the demands of developed markets is very limited at a time when the market requires more certificates in addition to the basic organic documents, e.g. fair trade and some of these are difficult for smallholders to acquire • Local markets are hard to develop because of poor understanding of organic, no local certification and inconsistent supply • Infrastructure and facilities such as cooling facilities and pack-houses are poor, especially in Uganda, which leads to poor post harvest handling • Mainstream agriculture, government and other leaders are still largely hostile to organic • Lack of adequate organic research applicable in the countries • Upcoming threats like proposed DDT spraying, DDT introduction • Lack of a common network, e.g. an East African Organic Network. • Inadequate funds to boost the activities of the sector

Table 6b. Opportunities for organic agriculture in East Africa

Opportunities
<ul style="list-style-type: none">• Climatic conditions in many parts of the region favour organic production• Farmers have a long history of low input production, which can be developed with further training and exposure• Due to the range of soil types within the region a wide range of crops can be grown.• A number of sound training institutions exist in the region such as KIOF and St Jude's Organic Training Centre• A number of larger companies wish to expand their output through the inclusion of out-grower schemes and a move into organic production• The first organic projects have been running in the region for over 10 years and hence there is good experience in commercial organisation of organic production• Strong national movements have developed to coordinate and promote organic agriculture, namely NOGAMU, KOAN and TOAM• IMO, KRAV, ECOCERT and Soil Association all have experience of inspection and certification in the region• Local certification companies exist in the region and national organic standards have been developed or are being developed• Smallholder farmers in the region enjoy working together in groups and this makes production and certification much easier• The demand for organic products in developed markets is increasing and the region has the ability to satisfy this demand.• Further research into the possible link between organic agriculture and HIV/Aids control• The multicultural population in the capitals can assist in the marketing of local organic production• In some areas the use of agrichemicals is non-existent which can lead to largely simplified inspection procedures and therefore low costs• Donors and NGOs are becoming more supportive of organic agriculture

7.1 Recommendations

The following recommendations are made with all the above in mind:

a) **Policy development** – The absence of national policy statements on organic agriculture within the region is a major constraint to the development of the industry. Organic agriculture is clearly in line with the development strategies of the governments within the region, as it offers a commercial option for smallholder farmers to engage in market-oriented agriculture, whether for the local or international markets. Policy development is being undertaken and the national movements are taking a lead in this, but the process needs to be pushed to completion so that other support factors, such as research and certification, which to a certain extent depend on government policy, can move forward. Organic agriculture is still discriminated against in many agriculture programmes as they include components of subsidized inputs;

b) **International certification completed at the local level** – This is not just about reducing the price of certification, as prices can be quite reasonable at US\$2 or US\$3 per farm, even

with the use of an international certification organization. However, other complications come into play when exporting products to ever increasingly controlled markets, one example of this are transaction certificates. Individual nations, or the East Africa region as whole, need to develop an organic certification system that is internationally recognized and allows produce to enter directly into developed markets. Accountability needs to develop within East Africa, so that if there is a problem it can be quickly and efficiently rectified;

c) **Regional standard** – There are many reasons to favour a regional standard. One major advantage of a regional standard is that it will facilitate regional trade, as there will be no technical barriers. Another advantage is that, rather than having to seek acceptance for each individual national standard, countries can work together to have a regional standard accepted by international export markets. Inspection, training materials and information efforts can be shared more easily if based on the same standards;

d) **Infrastructure development and tax incentives** – Organic agriculture requires separate handling facilities to ensure organic integrity. This requires heavy investment from companies interested in developing organic exports from the region. These extra costs as they relate to organic agriculture, which often come on top of the need to invest in certification, make the sector quite difficult to enter. Obtaining loans from commercial banks within the region is very expensive and to encourage development within the organic sector the governments should invest in infrastructure themselves, which could be utilized by exporters or help private investment through tax breaks. Government investment in this sector would not only have the advantage of drawing smallholder farmers into commercial production, but also answer their concerns about environmental impacts and increasing their reliance on external inputs;

e) **Research into production and social issues** – In some ways this comes back to the absence of an organic policy and hence the lack of direction for governments to invest in organic research. Farmers within the region have a huge wealth of indigenous knowledge on organic agriculture and this information now needs to be recognized and supported with the development of appropriate crop and animal types that meet the low input needs of the organic sector. The increasing interest in the link between organic agriculture and HIV/AIDS management also needs to be investigated as does the social implications of promoting commercial organic agriculture, including effects on levels and distribution of household income. Organic agriculture should be introduced in learning institutions at all levels to stimulate production knowledge and expertise within the sector;

f) **Local and regional market development** – Export markets will continue to be very important, but as many farmers do not produce crops which can compete effectively in export markets, local and regional markets need to be developed. For this to happen the following needs to take place: increased consumer awareness, distinct national or regional organic labelling, cooperation among stakeholders and producers to organize supply;

g) **Foster regional cooperation** – There are a number of advantages to regional cooperation, such as standards, market research and training;

h) **Increased investment in the sector** – Stronger government backing could lead to more opportunities for government and private investments in the sector, which would enhance its development;

i) **Group certification focus** – Such a focus may be a more efficient and equitable method of certification. Producers would benefit from training on how to access world market prices. This knowledge would then, it is hoped, be disseminated throughout the sector. Producers would thereby be sensitized to global price fluctuations and could also make informed decisions on what commodities to produce, within the constraints of climate, soil, etc. Groups of producers could be trained, and then disseminate this training to further groups in an ongoing process monitored and facilitated by bodies such as EPOPA and the national movements; and

j) **Increased value added in the country of production** – For example, the exporting and selling of value-added products such as soaps, creams and so forth on the local market, rather than exporting raw materials for processing in Europe or the United States. Tanzania launched an organic ginger in syrup/candied ginger project in the first half of 2005.

8. References

Grolink (2002) Feasibility study for the establishment of certification bodies for organic agriculture in Eastern and Southern Africa. Report commissioned by Sida/INEC, Höje.

Thomas, Brother Morus Bertram OSB (1997) Miaka mia moja ya Abasia Peramiho 1898-1998. 100 Years Organic Gardening.

NOGAMU/SATNET (2004) Draft report on product chain analysis.

9. Appendices

Appendix 1. Stakeholder analysis: Kenya

Stakeholder category	Activity	Comments
1. Private Sector		
i) Self-help groups/ producer associations	Mostly involved in production of organic crops either for national and local markets or for subsistence.	<p>These include: Small farmers organizations (SFOs), community-based organizations, (CBOs), faith-based organizations (FBOs) and farmer groups (FGs).</p> <p>Most of the training organizations mobilize farmers from the same area into FGs or organic farmer groups (OFGs).</p> <p>Membership per group ranges from between 20 to 30 farmers (see ii).</p> <p>Conservative estimates suggest there are 35,000 groups of farmers spread countrywide.</p> <p>Some groups of farmers have organized themselves into marketing units.</p>
ii) Commercial farmers	There are a growing number of organic certified companies/ operators who produce for both the national and international markets. Some companies are growing organic vegetables, fresh and dried fruits, dried herbs and spices and some have ventured into wild harvest products.	<p>These are mainly business companies, large scale companies, certified organic and producing for export with certified out-growers. There are certified organic medium scale companies producing for export, some share overheads and management of exporting consignments together, i.e. KOPA. There are also a few certified organic farmer groups who have formed companies and are now exporting. There are a number of small companies who are not currently certified and are producing for local consumption.</p> <p>There are 12 certified producer companies and four undergoing conversion, 15 small companies producing for the local market.</p>

<p>iii) Processors</p>	<p>There are organic certified companies extracting essential oils from herbs, spices and cold pressed oils from high value crops and tree seeds oils, drying and semi-processing herbs and nutraceutical plant products. Other certified organic companies are exporting retail packed vegetable (high-care), retail packed macadamia, coffee and tea. Non-certified organic producer organizations are drying fruits and processing dried fruit, juices, jams and chutney for national and regional markets.</p>	<p>In most cases, for certified organic operators, the same companies that produce the raw materials carried out their own processing in accord with their buyers requirements. However there are companies, certified organic operators that buy raw materials directly from small-scale producers/out growers and carry out the processing prior to export.</p>
		<p>Non-certified organic operations, supplying national and local markets, are mainly processing their own products on a smaller scale.</p>
<p>iv) Traders and retailers</p>	<p>Trade in both the local and export arenas, trade of raw and semi-processed products from primary operators.</p> <p>There are also those who deal with input supplies.</p>	<p>Some national supermarkets have recently designated organic sections in their stores, (i.e. Uchumi Hyper and Nakkumatt supermarkets). All of these products carry organic labelling but some have not been certified.</p> <p>Some greengrocers also stock organic products, Healthy U, Green Corner Shop, ABC Place, among others.</p> <p>Natures Organics together with a group of farmers have started Box Schemes in Nairobi and outskirts. Organic Marketers Ltd, Natural Food Marketers and Findus in Africa, buy and sell organic products.</p> <p>Effective Micro-organisms (EM) supply EM products, BIOP Ltd is a company that supplies organic fertilizers and pest and disease control products, as does Saroneem Products. Minjingu Phosphate supply rock phosphate, other pesticide manufactures produce biological controls.</p> <p>Some of these food and non-food products carry organic labelling, although most are not certified.</p>

v) Certifiers and inspection agencies	Certification of organic products for regulated export markets.	There are four main international certifiers that are operating in Kenya; IMO, BioSwiss, EcoCert, and the Soil Association, mostly using nationally based inspectors.
	There is currently no certification facility for the national market. However, it is expected that this will be developed in the latter part of 2005.	AfriCert and Encert are two national companies that have been formed over the last 12 months to start organic certification for the national market. Both partner with international accredited certified companies. They are developing their services to offer multiple certification (Encert - organic, fair-trade, sustainable wild harvest. AfriCert is already providing Eurogap inspections and developing organic inspection services). Both companies are in early stages of development.
2. Civil society organizations		
i) Training and research Institutions	Training in organic agriculture techniques.	There are 30 organizations offering organic agriculture training; two offering diploma courses, four offering certificate courses, the rest offer short courses. The diploma course takes two years, diploma one and a half years, and short courses between one to two weeks.
	Research for organic pest and disease controls.	ICIPE (International Centre for Insects Physiology and Ecology) carries out research on organic pest and disease remedies and, through BIOP Ltd, has developed a range of organic fertilizers and pesticides.
ii) Other promoters	These promote organic agriculture through community mobilization, capacity-building and networking.	These comprise NGOs and CBOs that have a component of organic/sustainable agriculture in their programmes. The Environment Liaison Centre International (ELCI) is hosting KOAN over its incubation period and is an advocate of organic farming and natural products development. It produces a quarterly periodical, Eco-forum, which promotes environmental (and organic) issues.
3. Government		
i) Kenya Bureau of Standards (KBS)	Development of the Kenya Guidelines for Organic Production, Processing and Packaging.	The standard has reached the public review stage and is scheduled to be operational by late 2005.

ii) Ministry of Agriculture	Very little contribution to the development of the organic sector to date.	Due to the lack of exposure to the benefits of organic agriculture and the commercial aspects of organic farming, government reception to the movement and the growing industry is currently lukewarm, as far as the ministry heads are concerned. However, the interest from the government extension service is overwhelming. At the district level there are increasing requests for KOAN and organic training organisations to provide training in organic techniques certification and marketing to extension officers partly due to the Kenya Organic Agriculture Project which is run through the MOA, but supported by the FAO.
iii) Public research institutions and Universities	Training and research on organic agriculture.	<p>Egerton University has recently included an organic agriculture module in their agriculture diploma course curricula. Jomo Kenyatta University and Technologies (JKUT), in collaboration with KIOF and a university in the UK, is developing curricula for diploma and degree courses in organic agriculture.</p> <p>Kenya Agricultural Research Institute (KARI) has carried out research on green manure and compost analysis.</p> <p>The Kenya Tea Foundation and the Kenya Coffee Foundation have established field trials for both organic coffee and tea.</p> <p>The Kenya Pyrethrum Board, has received orders for organic pyrethrum and intends to begin conversion to organic certified status this year.</p> <p>The Nairobi University have no specific training on OA, however they do conduct research on individual components related to OA, such as: research on composting, organic manures, Bt (<i>Bacillus thuringensis</i>), rock phosphate.</p>
4. Development partners	Facilitate implementation of projects.	Development partners who have recently, or who are currently operating in Kenya include; Hivos, Miserio, Sida, FAO, UK-DFID, GTZ, Biovision, Rockfeller, UNDP, CDE, CBI, FibL and HDRA, among others.

Appendix 2. Stakeholder analysis: Tanzania

Stakeholder	Role
<p>Government:</p> <p>Ministry of Agriculture and Food Security</p> <p>Ministry of Industry and Trade</p> <p>Ministry of Natural Resources and Tourism</p> <p>Vice President Office, Environment</p> <p>Ministry for Regional Administration and Local Government</p> <p>Ministry for Livestock and Water</p> <p>Ministry for Local Government, Marketing, Cooperative and Community Development</p> <p>Ministry for Land and Habitat</p>	<p><i>Policy and extension service delivery. In Tanzania extension services are under the Government</i></p>
<p>Government institutions;</p> <p>Sokoine University of Agriculture</p> <p>University of Dar es Salaam</p> <p>College of Moshi cooperatives</p> <p>University College of Lands and Architectural Studies</p> <p>Agricultural and livestock research and training institutes (Mikocheni, Katrin, Mlingano, Ukiliguru, Morogoro, Ilonga, Uyole, Nyegezi, Selien, Naliendele, Tumbi, Kibaha, Mpwapwa)</p> <p>Tropical Pesticides Research Institute</p> <p>Tanzania Bureau of Standards</p> <p>Board of External Trade</p>	<p><i>Training, research, regulatory, Marketing promotion</i></p>
<p>Civil Society Organizations:</p> <p>KIHATA</p> <p>TOFO - Tanzania Organic Foundation</p> <p>SEED - Sustainable Environment for Economic Development</p> <p>ZAFFIDE</p> <p>Envirocare</p> <p>UHAI</p> <p>Sunnhemp seed bank</p> <p>PELUM-TZ</p>	<p><i>Organize farmers for production</i></p> <p><i>Delivery of extension services, fund raising for training and awareness promotion.</i></p> <p><i>Lobby and advocacy</i></p>

ADP Trust Matunda-Mema MAYAWA	
Organic movements: TOAM – Tanzania Organic Agriculture Movement	<i>Lobbying with government and uniting organic stakeholders for a common voice and advocacy</i>
Certification bodies: TanCert IMO Bio-Inspecta Ecocert	<i>Inspection and certification services</i>
Companies: Biore PCI Fida Hussein Dabaga Biolands LIMA Bombay Burma MTC TATEPA KIMANGO Kibidula TAZOP Zanz-Germ OCSD- essential oil distilleries of Pemba EPOPA - TZ	<i>Operators, processing, packaging and exporter</i>
Cooperatives: Kilimanjaro native cooperative union - KNCU Kagera cooperative union - KCU	<i>Organize farmers for production, processing and marketing</i>
Partners: Grolink IFOAM Agro Eco	<i>Assist the sector development through funding, technical assistance, international lobbying and recognitions and consultancy.</i>

Note: Stakeholders are grouped according to nature of their role played in the development of the organic sector in the country.

Appendix 3. Stakeholder analysis: Uganda

Stakeholder	Role
<p>Government:</p> <p>Ministry of Agriculture Animal Industry and Fisheries (MAAIF)</p> <p>Ministry of Trade, Tourism and Industry</p>	<p><i>Policy and extension service delivery. In Uganda extension services are under the National Agricultural Advisory and Development Services (NAADS)</i></p> <p>Export promotion</p> <p>Enabling and monitoring trade related issues</p>
<p>Government institutions;</p> <p>Uganda Export Promotion Board (UEPB)</p> <p>Uganda Investment Authority (UIA)</p> <p>Uganda Coffee Development Authority</p> <p>Uganda National Bureau of Standards</p> <p>National Agricultural Advisory Services</p> <p>Plan for Modernization of Agriculture</p>	<p><i>Training, research, regulatory, Marketing promotion</i></p> <p>Research</p> <p>Standardization</p> <p>Advise and control of coffee sector</p> <p>Standards development and monitoring</p> <p>Extension services in privatized – government supported system</p> <p>Secretariat monitoring general agricultural development</p>
<p>Educational Institutions</p> <p>Makerere University</p> <p>Uganda Martyrs University Nkozi</p>	<p><i>Training and research</i></p>
<p>Civil Society Organizations:</p> <p>Agricultural Council of Uganda</p> <p>Kulika Charitable Trust (Uganda)</p> <p>Send a Cow (U) Ltd</p> <p>Africa 2000 Network</p> <p>Sustainable Agriculture Trainers' Network</p> <p>Students Partnership Worldwide</p> <p>VEDCO</p> <p>ACODE</p> <p>Cashfarm (U) Ltd</p>	<p><i>Organize farmers for production. Delivery of extension services, fund raising for training and awareness promotion. Lobby and advocacy</i></p> <p>NGO initiative with close Gov support and links</p> <p>Sus Ag training, lobbying and advocacy</p> <p>Empowerment of farmers through livestock and org gardening</p> <p>Resource mobilization and technical support</p> <p>Improvement of food security</p> <p>Environmental management</p> <p>Production and market support</p> <p>Lobbying and advocacy</p> <p>Commercial farming support</p>

<p>VECO – Uganda</p> <p>Caritas – Uganda</p> <p>Rural Community in Development</p> <p>EMESCO Development Foundation</p> <p>PELUM</p>	<p>Production and advocacy support</p> <p>Production training</p> <p>Org and Sus Agric training</p> <p>Production support</p> <p>Technical training in development issues</p>
<p><i>Organic movements:</i></p> <p>National Organic Agricultural Movement of Uganda (NOGAMU)</p>	<p><i>Lobbying with government and uniting organic stakeholders for a common voice and advocacy</i></p> <p>Promotion, training, lobbying, networking, standardization and research</p>
<p><i>Certification bodies:</i></p> <p>UGOCERT</p> <p>SGS – Uganda</p> <p>IMO Kontrol</p> <p>Krav</p> <p>EcoCert</p>	<p><i>Inspection and certification services</i></p> <p>National inspection services</p> <p>National inspection services</p> <p>International inspection services</p> <p>International inspection services</p> <p>International inspection services</p>
<p><i>Companies:</i></p> <p>Lango Organic Farming Promotion</p> <p>Uganda Marketing Services</p> <p>African Organic</p> <p>Bio Fresh Ltd</p> <p>Masaka Organic Producers</p> <p>Tropical Ecological Foods Uganda</p> <p>Sulma Foods</p> <p>Kawacom</p> <p>Ibero</p> <p>Jaksons (U) ltd</p> <p>Agricultural Organic Exports</p> <p>Outspan</p> <p>Bio Uganda</p> <p>Bo Weevil</p>	<p><i>Operators, processing, packaging and exporter</i></p>
<p><i>Cooperatives:</i></p> <p>Gumutindo Coffee Coop</p> <p>Kayunga organic Agriculture producers Association</p> <p>Nombe Organic Producers Association</p> <p>Masaka Organic Producers</p> <p>Namulonge Horticultural Producers</p>	<p><i>Organize farmers for production, processing and marketing</i></p>

<p>Bufumbo Organic Agriculture Producers Association Lusanja Agali Awamu</p>	
<p>Partners: HIVOS EPOPA DED CBI AGROECO IFOAM CORDAID ASPS DANIDA</p>	<p><i>Assist the sector development through funding, technical assistance, international lobbying and recognitions and consultancy.</i></p>

Appendix 4. Organic production in, and exports from, Kenya (June 2005)

Company Name	Products	Acreage (certified)	Acreage (in conversion)	Estimated Yield (tonnes)	Certifiers	Main markets	Employees	Outgrowers
Mr Pineapple	Pineapples	80 Ha	121 Ha	4500	IMO	Germany	Approx 120	60 (2-15 acres each)
Three palm Garden	Chillies	171 Ha		82	BioSwiss	USA	3	40 outgrowers
Sunripe	Beans, peas, sweet corn, chillies, avocados, passion fruits, raspberries	190 Ha		380	Soil Association and Ecocert	UK and Europe	1800	3 commercial farms, 45 outgrowers
Vitacress	Salad and baby vegetables	42 Ha		100	Soil Association	UK	Over 700	none
Mt Kenya Herb	Ashgwanda, astragalus, calendula, catnip, red clover, valerian.	8 Ha		5.7	Ecocert	EU	40	
Meru Herbs	Chamomile, carcade, lemon grass, (papaws, mangoes, guava, sweet bananas, (not for export)	62 ha	120 Ha	86	Soil Association	Belgium, Japan, Austria, Italy, Germany	64 workers	43 Certified, 123 (conversion)

Cinnabar Green	Essential oils and dried herbs) geranium oil, borage seeds, lemon grass, rosemary, coriander, cumin pink pepper	40 ha	12 Ha	28	Ecocert	Germany England	37 permanent 20 contracted 60-80 casual employees, 60-80 Harvesters	Outgrowers – 55+
Africa Botanica	Leleshwa, (<i>tachonanthus camphorates</i>), aloe secundra, pepper tree oil, <i>Lippia javanica</i>	100, 000 Ha for wild harvest.			Ecocert	Europe/ US	23 full time 70 part time	8-10 technicians 35 full time staff, 70 additional women harvesters
Finlay	Tea	64 Ha		153 (dried)	Soil Association	UK	Approx 1,400	none
Kisima (other KOPA certified members)	Fresh vegetables, honey, dried herbs and spices (paprika, birds eye chillies, taetes, <i>echinecea purpea</i> , coriander, calendula, borage, safflower	80,070 has 42 ha in intensive production- rest is for honey production		30	Ecocert	UK	70 permanent, 30 temporary	150 wild honey harvesters.
Kenya Nut	Ground nuts, macadamia nuts, cashew nuts, tea, coffee	818 Ha		4908	Soil	2500		10,000 out-growers
Kigwa	Coffee	36		43	Soil Association			none

Arbor Oils	Gums and resins, tree seed oils, cold pressed		Conversion starts by end of 2005 of over 1,500 km ² .		Ecocert	Europe and the US	5 full time	Over 5,000
MOOF	Borage		400 ha (plus 200 ha in 2006)		Ceres			400, plus another 200 in 6 months
Earthoils – Kenya Ltd	Cold pressed oils	4 ha			Ecocert	Europe and the US	28 full time	Over 2,000
Total Acreage		181,585 Ha	853 Ha	4981*				

*This is an estimated figure from average yields, but individual company enquiry is required for actual purchased and export quantities.

Appendix 5. Organic production in, and exports from, Tanzania (June 2005)

Company Name	Products	Area (Ha) (certified)	Area (Ha) (in conversion)	Estimated Yield (tonnes)	Certifiers	Main markets	Location	Outgrowers
KNCU	Arabica coffee	812	204	72.435	-	EU/US	Kilimanjaro	1527
Abdeali	Mangoes	-	-	-	-	Local	Morogoro	Farm
ADP Isangati	Tumeric	-	-	-	-	Local	Mbeya	NGO
Biolands	Cocoa	-	-	-	-	-	Kyela	-
Biore Tz	Cotton	5748.4	-	1622 bales	-	-	Meatu	1283
Bombay Burmah	Black tea	-	-	-	-	-	Lushoto	-
CSOD	Essential oils	50	-	-	-	-	Pemba	-
Dabaga	Canned pineapples	-	-	-	-	-	Iringa	-
Fidahusseini	Honey	3077	-	-	-	-	Rufiji	507
KCU	Robusta coffee	1525.2	-	425	-	-	Kagera	3352
Kibidula	Herbs	-	Conversion	-	-	-	Mafinga	-
KIMANGO	Herbs and spices	-	-	-	-	-	Morogoro	-
LJMA	Arabica coffee	-	-	-	-	-	Tukuyu	-
Matunda-Mema	Dried fruits	294	-	-	-	-	Kagera	78
MAYAWA	Vanilla	-	-	-	-	-	Kagera	-
Mkuranga women vegetable growers	Vegetables	3.4	-	-	-	-	Mkuranga	34

MTC	Black tea and herbs	-	-	-	-	-	-	-	Njombe	-
PCI	Cashew nuts	1215.6	-	709	-	-	-	-	Dar es Salaam	468
TANICA	Instant coffee	-	-	-	-	-	-	-	Kagera	-
TATEPA	Black tea and herbs	-	-	-	-	-	-	-	Mafinga	-
TAZOP	Herbs and spices	-	-	-	-	-	-	-	Zanzibar	-
ZANZ-GERM	Ginger, pepper, tumeric, chilli and lemon grass	4400	-	65	-	-	-	-	Zanzibar	741
Totals		17125.6								7656

*This is an estimated figure from average yields, but individual company enquiry is required for actual purchased and export quantities.

Appendix 6. Export statistics of Uganda 2004

Company Name	Products	Area (Ha) (certified)	Area (Ha) (in conversion)	Estimated Yield (tonnes)	Certifiers	Main markets	Location	Outgrowers
Amfri Farms – African organics	Fresh fruits, dried fruits	-	-	800 50	IMO	EU	Central Uganda	100
Bo Weevil – Lango Organic Farming promotion	Cotton lint, sesame, chillies	-	-	1356 bales 734 -	Ecocert	EU	Lira and Apach	12000
Outspan Enterprises	Sesame	13166	-	400	IMO/Naturland	EU	Lira. Kaberamaido Apac	6530
Kawacom	Robusta coffee	2026	-	100	CERES	EU and US	Bushenyi	5000
Kawacom	Arabica coffee	11238	-	200	CERES	EU and US	Nebbi	5000
Kawacom	Arabica coffee	3574	-	200	CERES	EU and US	Kapchorwa	4500
TEFU	Dried tropical fruits	-	-	20	CERES	EU	Mubende	31
MOP	Dried tropical fruits	-	-	15	IMO/KRAV	EU	Masaka/Rakai	57
Uganda Marketing Services	Vanilla, dried fruits	529	-	0.3 -	IMO	EU/US	Mukono	50
Gumutindo	Fair trade arabica coffee	-	-	36	KRAV	EU	Mbale	733

Ibero	Robusta coffee, vanilla	598	-	80	IMO/Naturland	EU	Luwero	900
ESCO	Cocoa vanilla	2118	-	168 0.14	IMO/KRAV	EU/US	Bundibugyo	2500
BioUganda	Fresh tropical fruits	77	-	150	IMO/Naturland	EU	Mukono/ Luwero/ Mubende	150
Biofresh	Fresh tropical fruits	588		104	IMO	EU	Central Uganda	100
Barkcloth	Barkcloth	239	-	-	CERES	EU/US	Masaka/Rakai	240
Totals		34153		4309.4				37891

Appendix 7. Summary Regional Organic Export Matrix

Product	Kenya	Tanzania	Uganda	Total (East Africa)
Tropical Fruit (Fresh and Dried)	4500	78	885	5463
Fresh Vegetables	510	34	0	544
Herbs and Spices (Incl Chilli & vanilla)	202	65	20.5	287.5
Tea	153	0	0	153
Nuts	4908	709	0	5617
Coffee	43	497.5	616	1156.5
Cotton	0	1622	1356	2978
Cocoa	0	0	168	168
Sesame	0	0	826	826
TOTAL	10316	3005.5	3871.5	17193

Figures compiled by Alastair Taylor from Appendix 4-6 estimates, all figures in tonnes and based on 2004 figures for Uganda and through June 2005 figures for Tanzania and Kenya.