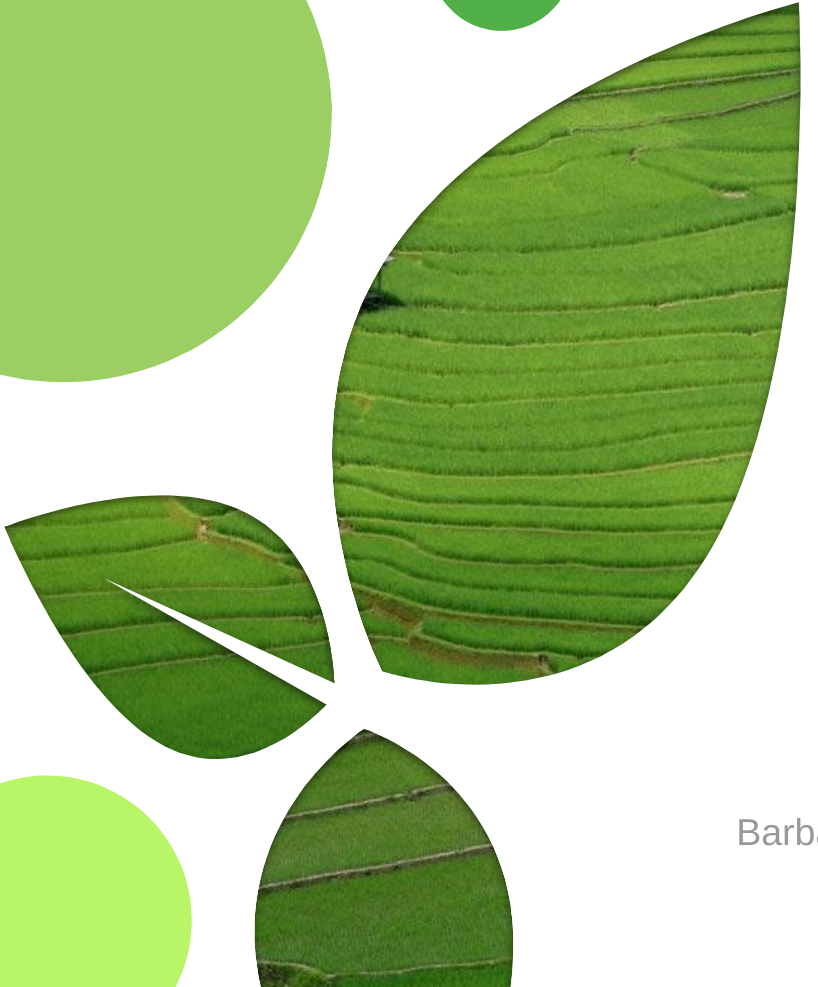


Impact of SIDA support to the Organic Sector in East Africa

Barbara Zilly, Head of Capacity Development Department IFOAM – Organics International – Nairobi, 18th of June 2019

IFOAM – Organics International

About IFOAM-Organics International

- **Our Identity:**
- We are a global agent of change and catalyze systemic change towards truly sustainable agriculture through increasing adoption of organic agriculture. Our theory of change guides the actions that we launch together with like-minded partners and with our membership: the global organic movement, which provides our legitimacy.
- **Our Vision:**
- Broad adoption of truly sustainable agriculture, value chains and consumption in line with the principles of organic agriculture.
- **Our Mission:**
- Leading change– organically!

About IFOAM-Organics International

- **Activities and Services of IFOAM - Organics International:**
- We have been setting Organic Landmarks since 1972;
- We provide information about Organic Agriculture and Markets
- We link to a global network for Organic Agriculture and the regional bodies and network partners
- We advocate at global level to represent the contribution of organic agriculture to the SDGs
- We promote verification systems from formal to informal
- We provide advice to governments for organic regulation
- We provide Capacity Building through the IFOAM Academy

The 4 Principles of Organic Agriculture

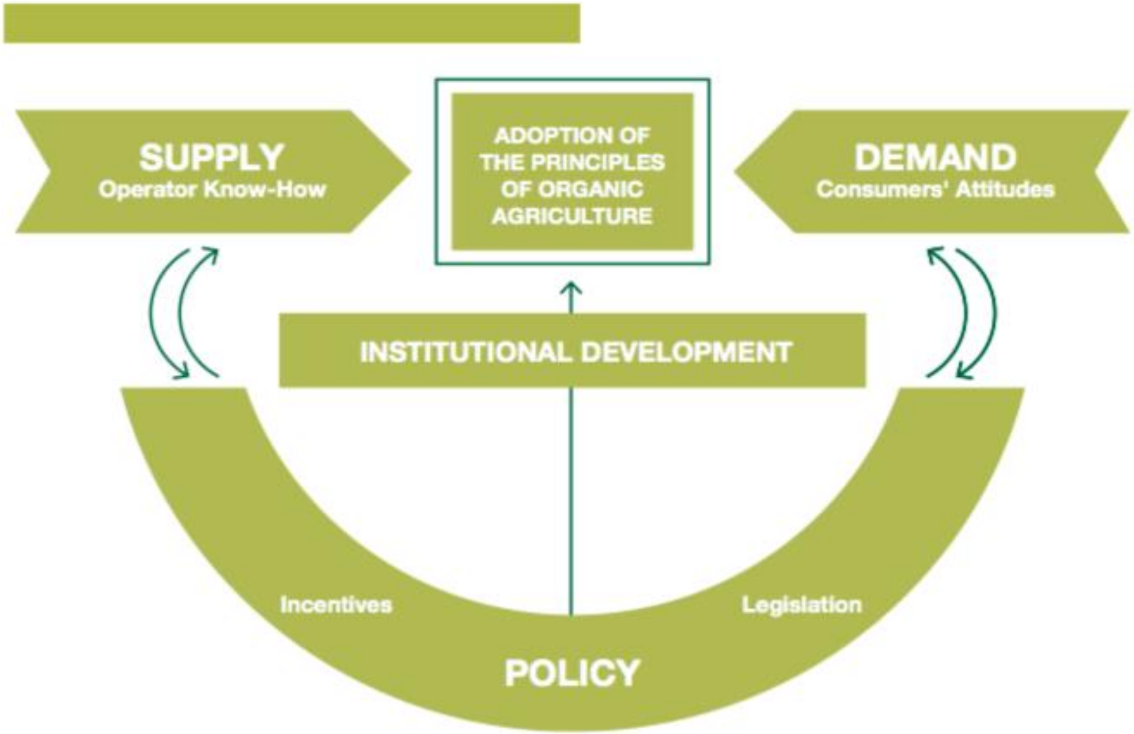
Organic Agriculture should sustain and enhance the health of soil, plant, animal, human and planet as one and indivisible.

Organic Agriculture should be based on living ecological systems and cycles, work with them, emulate them and help sustain them.

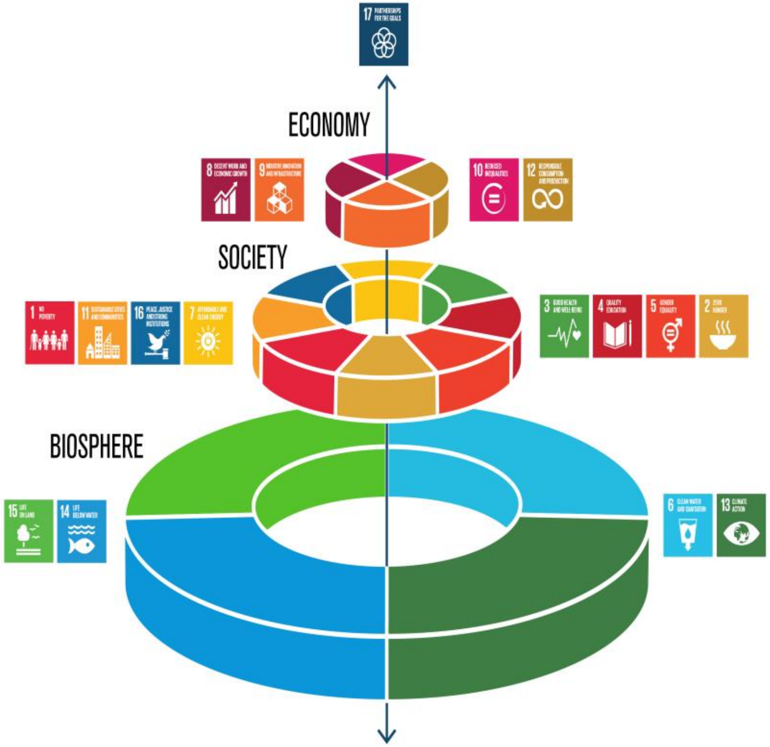
Organic Agriculture should build on relationships that ensure fairness with regard to the common environment and life opportunities.

Organic Agriculture should be managed in a precautionary and responsible manner to protect the health and well being of current and future generations and the environment.

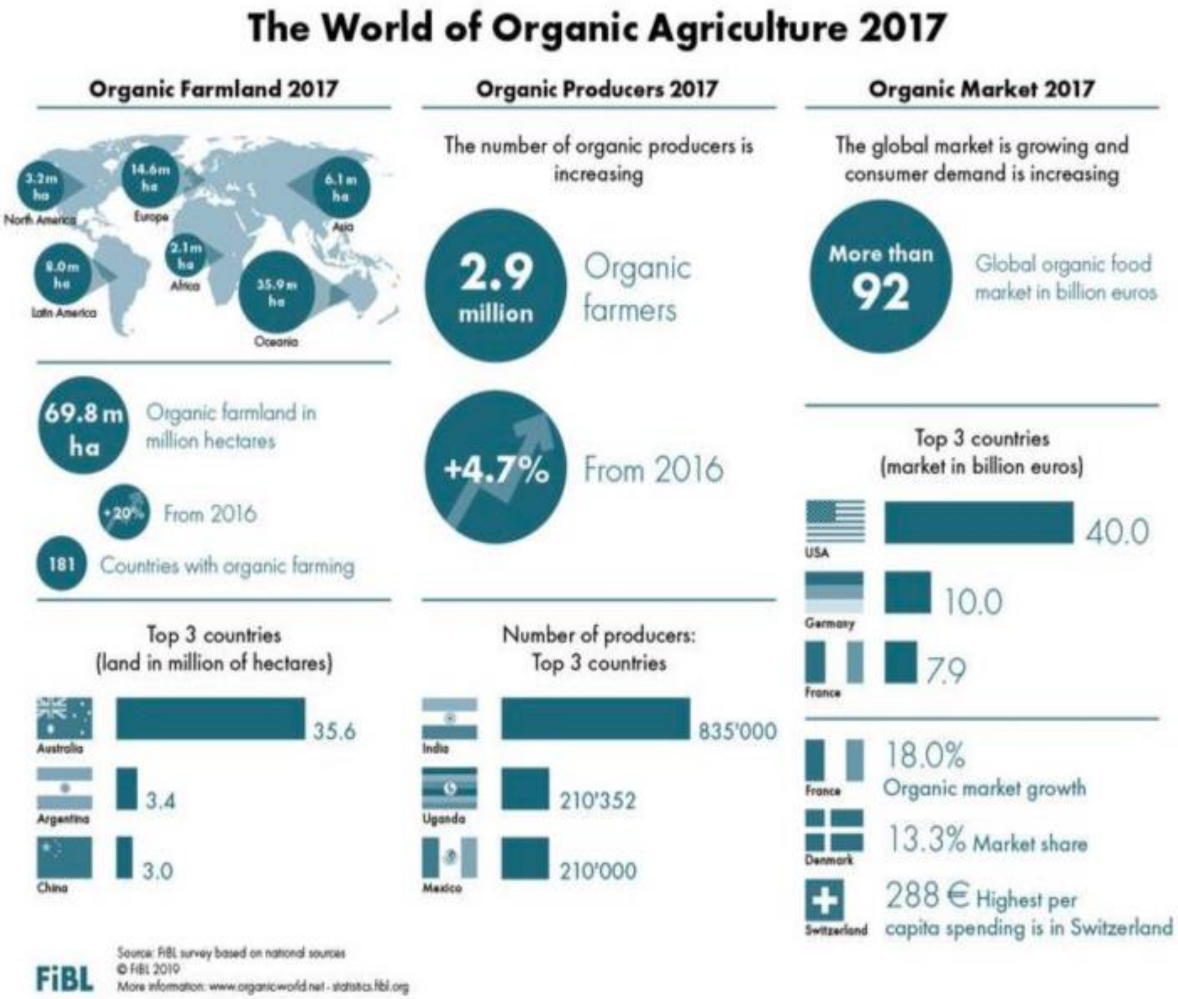
Our Theory of Change



Organic Agriculture and the SDGs



The World of Organic Agriculture



The World of Organic Agriculture 2017
Organic Farmland 2017
3.2m ha
North America
14.6m ha
Europe
6.1 m ha
Asia
8.0m ha
Latin America
2.1m ha
Africa
35.9m ha
Oceania
69.8 m ha
Organic farmland in million hectares
+20%
From 2016
181
Countries with organic farming
Top 3 countries
(land in million of hectares)
Australia
35.6
Argentina
3.4
China
3.0
Organic Producers 2017
The number of organic producers is increasing
2.9 million
Organic farmers
+4.7%
From 2016
Number of producers:
Top 3 countries
India
835'000
Uganda
210'352
Mexico
210'000
Organic Market 2017
The global market is growing and consumer demand is increasing
More than 92
Global organic food market in billion euros
Top 3 countries
(market in billion euros)
USA
40.0
Germany
10.0
France
7.9
France
18.0%
Organic market growth
Denmark
13.3% Market share
Switzerland
288 € Highest per capita spending is in Switzerland
FiBL
Source: FiBL survey based on national sources
© FiBL 2019
More information: www.organic-world.net - statistics.fibl.org

ORGANIC RETAIL SALES 2017

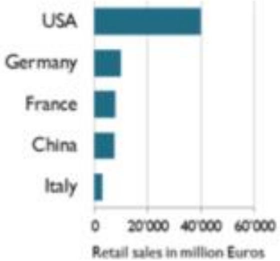
World
approx.
90 billion €

The largest single market is the USA followed by the EU (34.3 billion €) and China. By region, North America has the lead (43 billion €), followed by Europe (37.3 billion €) and Asia.

Distribution of retail sales value by country 2017

North America
almost
42 billion €

The countries with the largest markets for organic food are the United States (40 billion €), followed by Germany (10 billion €), France (7.9 billion €) and China (7.6 billion €).



The five countries with the largest markets for organic food 2017

288€
are spent per person in Switzerland

Switzerland has the highest per capita consumption worldwide, followed by Denmark and Sweden.

The five countries with the highest per capita consumption 2017

13.3%
of the food market in Denmark is organic

The highest shares the organic market of the total market is in Denmark, followed by Sweden, Switzerland, Austria, and Luxembourg.

The five countries with the highest organic shares of the total market 2017

ORGANIC FARMLAND 2017

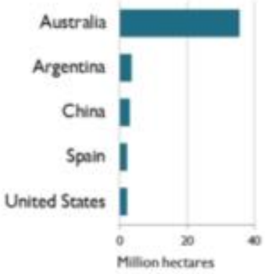
World
69.8
Mio ha

In Oceania there were 35.9 Mio ha, in Europe 14.6 Mio ha, and in Latin America 8 Mio ha.

Distribution of organic agricultural land by region 2017

Australia
35.6
Mio ha

The ten countries with the largest organic agricultural areas represent 79% of the world's organic agricultural land.



The five countries with the largest areas of organic agricultural land 2017

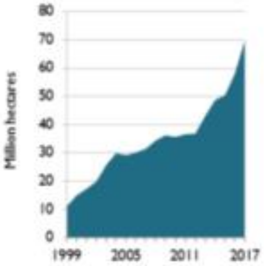
1.4% of the world's farmland is organic

14 countries have 10% or more of their agricultural land under organic management.

Top 5 countries with more than 10 percent of organic agricultural land 2017

+533% since 1999

In 2017, over 11.7 million hectares more were reported compared with 2016.



Growth of the organic agricultural land 1999-2016

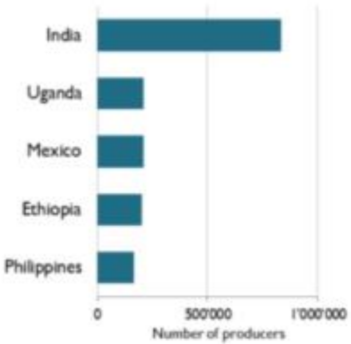
FiBL

Source: FiBL survey 2019 www.organic-world.net – statistics.fibl.org

ORGANIC PRODUCERS 2017

World 2.9 million producers

The country with the most organic producers is India, followed by Uganda and Mexico.



The five countries with the largest numbers of organic producers 2017

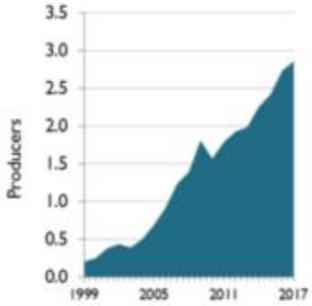
40% in Asia

More than 84% of the producers are in Asia, Africa, and Latin America.

Distribution of organic producers by region 2017

+1'300% since 1999

There has been an increase in the number of producers by almost 127'500, or over 5% since 2015.



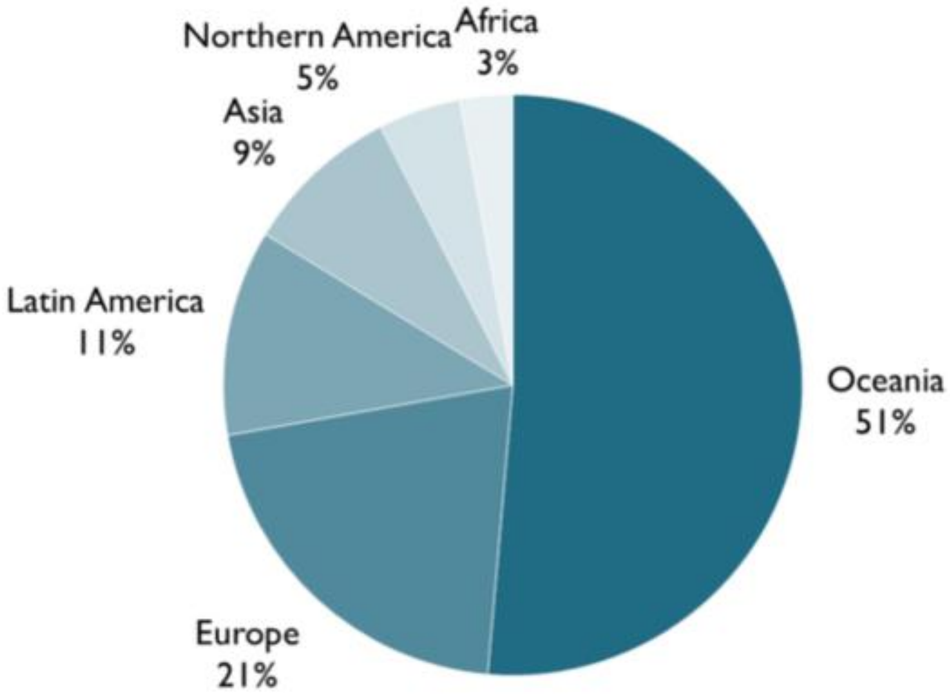
Development of the number of organic producers 1999-2017

FiBL

Source: FiBL survey 2019 www.organic-world.net – statistics.fibl.org

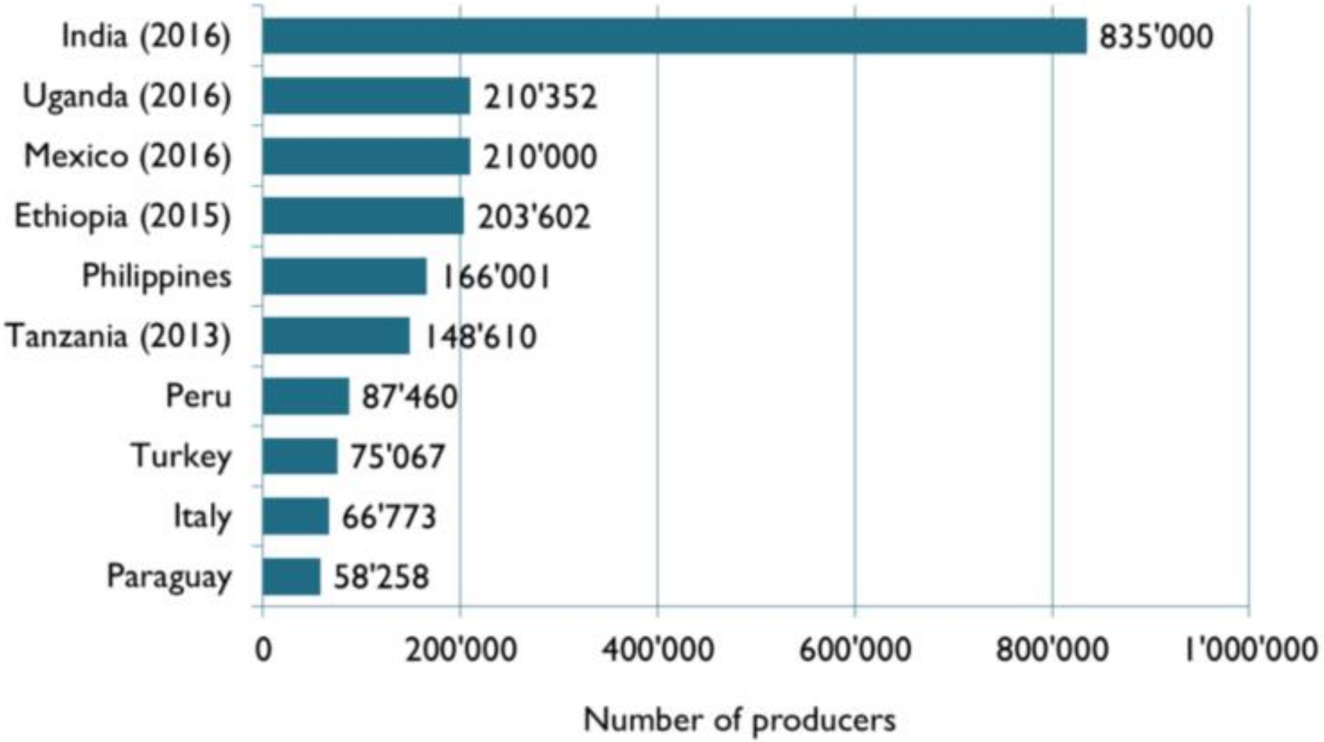
Distribution of organic agricultural land by region 2017

Source: FiBL survey 2019



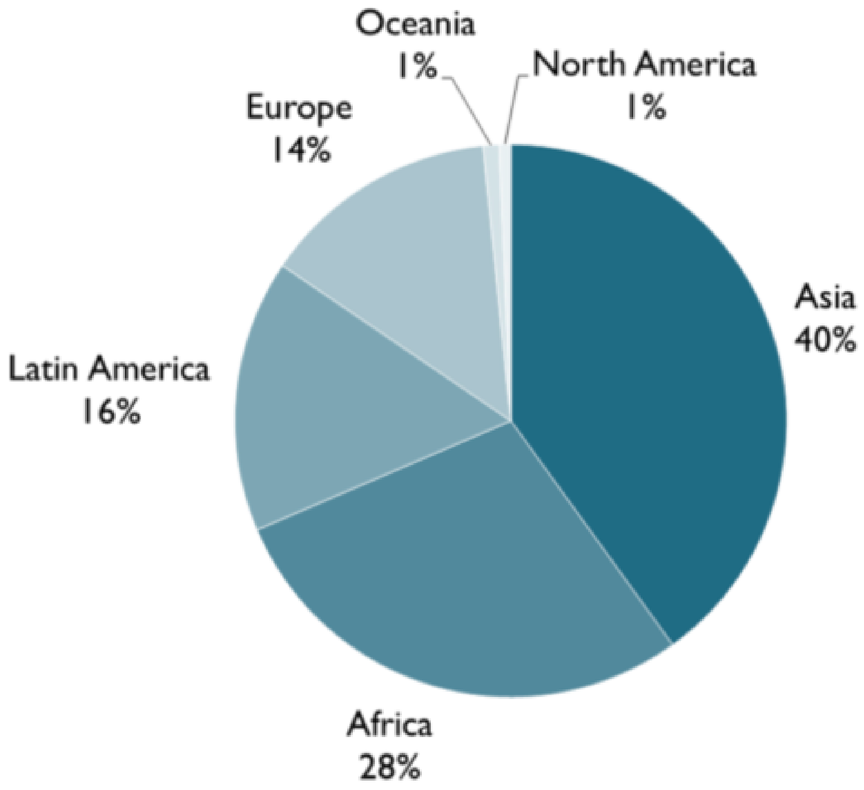
The ten countries with the largest numbers of organic producers 2017

Source: FiBL survey 2019



Distribution of organic producers by region 2017

Source: FiBL survey 2019



Development of the Organic East African Sector

Where we started

- In 1995 - no organic sector in East Africa
- Only a few pilot export projects for cotton and fruits in Uganda and for tea, cotton, herbs, spices and paprika in Tanzania.
- NGO driven support to address production decline and increasing input prices

EPOPA (1998 – 2008): a development through trade program - funded by SIDA

Intervention logic:

Integration of smallholder farmers into the organic export market leads to an improved livelihood

Arguments:

a) Lack of market access results in low agricultural development;

b) Existent market demand for organic products;

c) Smallholders close to organic, because they cannot afford inputs;

d) Access to international markets provide income;

e) Commercial sector needs to be involved to make this happen.

Main Actions:

- Implementation of export projects (34) – contracting of farmers, setting-up extension systems, quality control, internal control systems.
- Development of institutions: certification bodies in Uganda and Tanzania: UgoCert and TanCert to Facilitation of formation of TOAM (2004-5).
- Capacity Building: organic sector training (2 weeks), PM training courses, exporter seminars, targeted trainings
- Key results of the exporter projects:

Country	No of projects	No of farmers	Farmer income (US$)	Farmer premium (US $)	Total export (US $)
Tanzania	15	24.000	2,300,000	390,000	6,100,000
Uganda	19	87,000	12,600,000	2,600,000	25,000,000

Key results Institutions and Capacity Building:

- NOGAMU and TOAM received support and 1000nds of people got trained
- Key benefits to farmers - better price structure, market access as well as training. Higher income (between 20-300% increase) to build better houses, better schooling, invest in more land, etc.

Success factors of EPOPA:

- Clear market focus and focus on tangible results,
- Use of commercial actors to link farmers to markets,
- Integrating extension work in the commercial chain,
- Use of group certification to facilitate the certification process
- Increase of income for farmers

OSEA – Organic Standards and certification capacities in East Africa I (2006 – 2008)

Starting point:

- 5 public, several private, international standards existed for organic agriculture production in East Africa.

Outputs:

- East African Organic Products Standard (EOAPS) and regional organic trade mark “Kilimohai”. 2007 EOAPS adoption by EAC Council as official standard (EAS 456)

OSEA II - (2010 – 2013)

Overall objective:

- to improve income and livelihood of rural communities in East Africa.

Main actions focused on:

- Improved certification services in the region, introduction of PGS and development of national certification bodies.
- assisting in use of standards, awareness raising activities and maintenance of EOAM, regional trade development, policy development, expanding in E

Key results:

- Introduction and management of PGS regional-wide, strengthened certification bodies in Uganda and Tanzania, raised awareness, policy developments and expansion to Burundi and Ruanda.

Other important outcomes:

- In 2011, at the African Union Summit, a Heads of State and Government Decision on Organic Farming (decision EX.CL/631 (XVIII), 2011) was adopted with the aim to mainstream Organic Agriculture into national agriculture systems by 2025;
- Ecological Organic Agriculture (EOA) Initiative for Africa to support the development of sustainable organic farming systems in Africa and mainstream ecological organic agriculture into continental and national policies;

OTEA (2014 – 2018) Organic Trade and Value Chain Development

Overall Objective:

to contribute to improving the income and livelihood of rural communities in East Africa through the development of market oriented organic production

- focus on regional cooperation in line with the EAC aim to develop a) regional common market, 2) a customs union and 3) a stronger regional economy

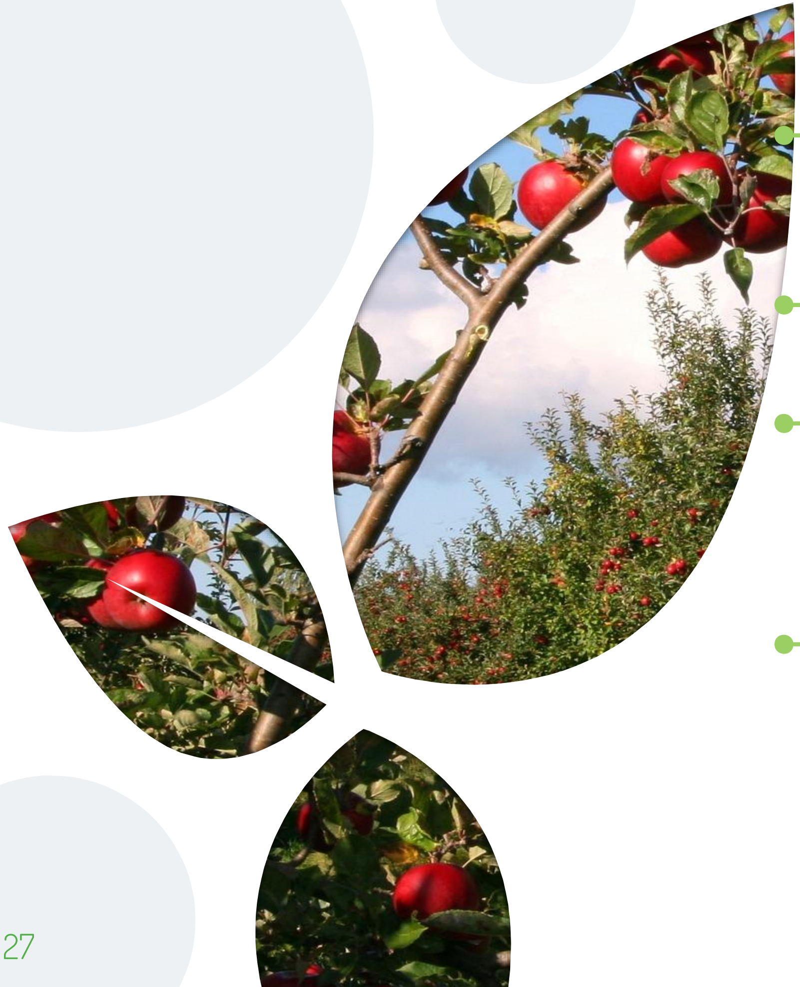
Main Actions

- Consolidation of the Organic Guarantee System in East Africa with the aim to increase the regional trade, putting the EOAPS and EOAM into practice,
- Support to domestic, regional and international market development,
- Facilitate development of organic sector umbrella organizations (nationals and regional),
- Advocacy and lobbying towards governments and EAC,
- Data collection and dissemination

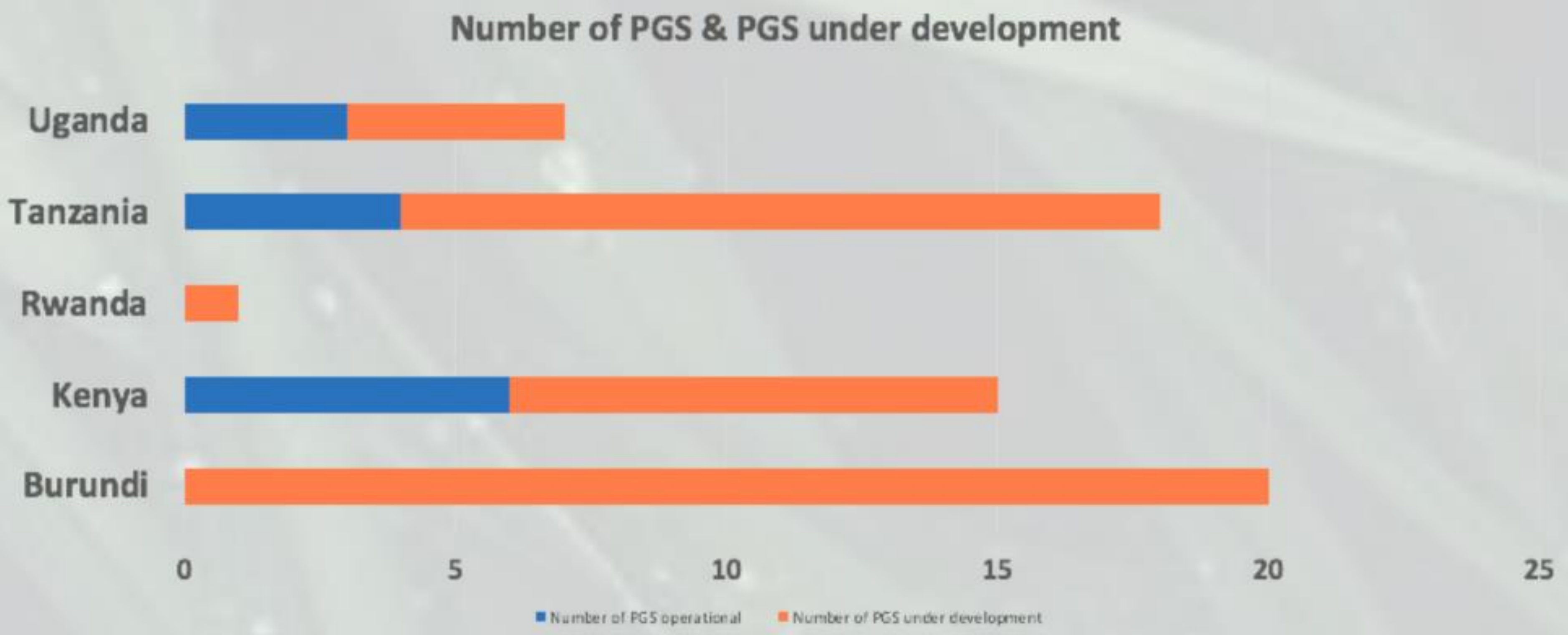
OTEA key results

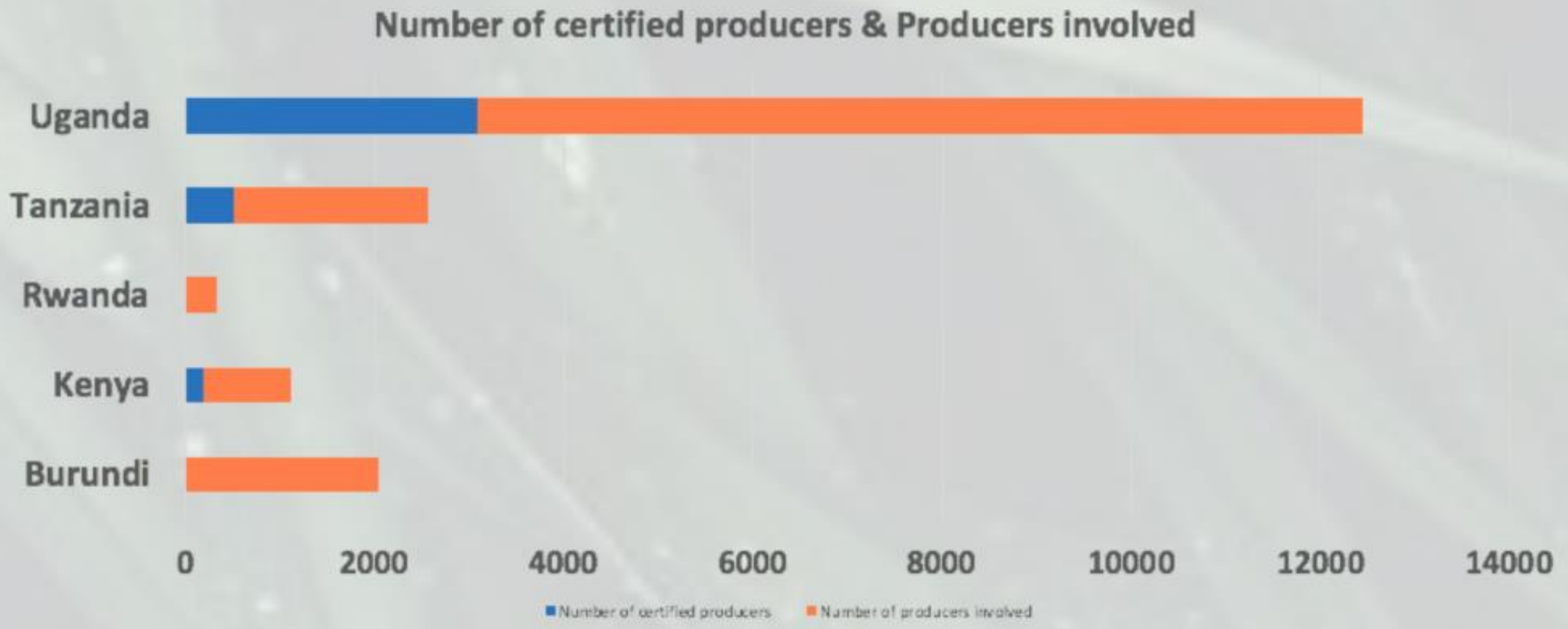
- Capacity in OGS has increased for inspectors at Certification Bodies, for NOAMS and also Policy Makers
- JMC under the EOAM Secretariat is operational
- EOAPs recognized in Bahrain, Dubai, Saudi Arabia and Quatar; and revised in 2018, currently in the adoption process by the EAC
- Regional harmonized PGS procedures in place
- Organic value chains functional in each country,
- 3rd Consumer Survey shows constant increase of knowledge and awareness about organic;
- Policy symposium in Arusha 2017, strong relationships to policy makers built

Comparison Consumer Surveys 2006, 2013 and 2017



- Awareness of organic foods: Compared to 2013, there was improvement in awareness by 5% from 35% to 40%. Reference to organic foods as "natural foods"
- Consumption in 2017 has increased by 10% (49% to 59%) from 2013 (in 2006 same % as in 2013)
- Similar to 2006 and 2013 findings, the health/nutrition, taste and safety factors in 2017 key motivation for consumption of organic foods. Price / affordability second most important consideration.
- Perceptions and attitudes: Consumers generally perceive organic as positive because of the exclusion of chemical fertilizers, and the encouragement of biological natural processes. Most consumers are willing to purchase organic if the prices are lower, similar or slightly higher than conventional.


Number of PGS & PGS under development
Uganda
Tanzania
Rwanda
Kenya
Burundi
0
5
10
15
20
25
Number of PGS operational
Number of PGS under development


Number of certified producers & Producers involved
Uganda
Tanzania
Rwanda
Kenya
Burundi
0
2000
4000
6000
8000
10000
12000
14000
Number of certified producers
Number of producers involved

Policy symposium Arusha 2017 and African Organic Conference 2018

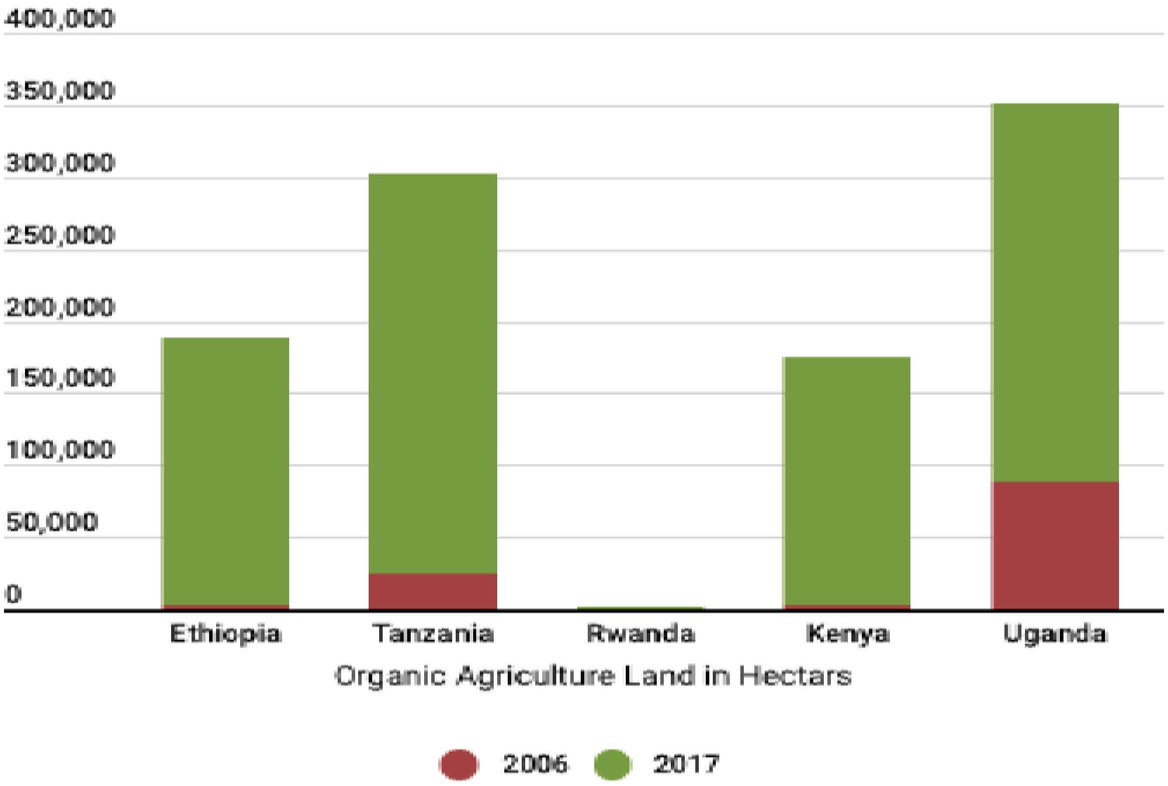
- Recommendations for the East African Community were formulated:
- Develop an organic agriculture policy in each East African country and assess policies that discourage organic agriculture
- Regional East African Organic Policy should be developed to ensure a harmonized approach to the sector.
- Regional and national governments should engage in raising awareness of the benefits of organic agriculture
- A declaration was adopted to put organic strategies for national and continental development in place in the context of the African Union Agenda 2063.

Challenges

- Focus on export not sufficient, inclusion of domestic markets;
- Trade barriers;
- Policy development tends to be a complex and lengthy process;
- Access to and availability of information;
- Insufficient research on Organic Agriculture;

Country	Mentioned Barriers for regional trade
Kenya	High taxation
	Lack of supplier and market information
Uganda	Border fees
	Border delays and bureaucracy
Tanzania	Infrastructure and logistics
	Tariffs and regulatory policies
Rwanda	Distance and logistics
	Lack of harmonization of pesticide registration
Burundi	Limited production
	Challenge of transport

Increase in organic agriculture land in East Africa between 2006-2017



SAVE THE **DATES**

2020

21-22 SEPTEMBER	**PRE-CONFERENCES**
22 SEPTEMBER	**OPENING CEREMONY** (IN THE EVENING)
23-25 SEPTEMBER	**CONFERENCES**
26-27 SEPTEMBER	**TOURS AND VISITS /** GENERAL ASSEMBLY OF IFOAM - ORGANICS INTERNATIONAL (FOR MEMBERS ONLY)

Thanks!

ANY QUESTIONS?

You can find me at

- b.zilly@ifoam.bio

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development and Cooperation SDC

Swedish Society for Nature Conservation

german cooperation
DEUTSCHE ZUSAMMENARBEIT

giz

Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung

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