



# Boosting Organic Trade in Africa

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

REGIONAL MARKET BRIEF FOR SOUTHERN, EASTERN,  
CENTRAL, WEST, AND NORTH AFRICA

This Market brief series is based on a study commissioned by IFOAM – Organics International in 2020 in order to better understand possible interventions that can promote market development and trade of organic produce in Africa.

The study was financed in the framework of the global project “Knowledge Centre for Organic Agriculture in Africa” (KCOA). The objective of the project is to establish five knowledge hubs that promote organic agriculture in Africa by disseminating knowledge on the production, processing and marketing of organic products as well as shaping a continental network. The project is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the German Ministry of Economic Cooperation and Development (BMZ) as part of the special initiative ONE WORLD – No Hunger.

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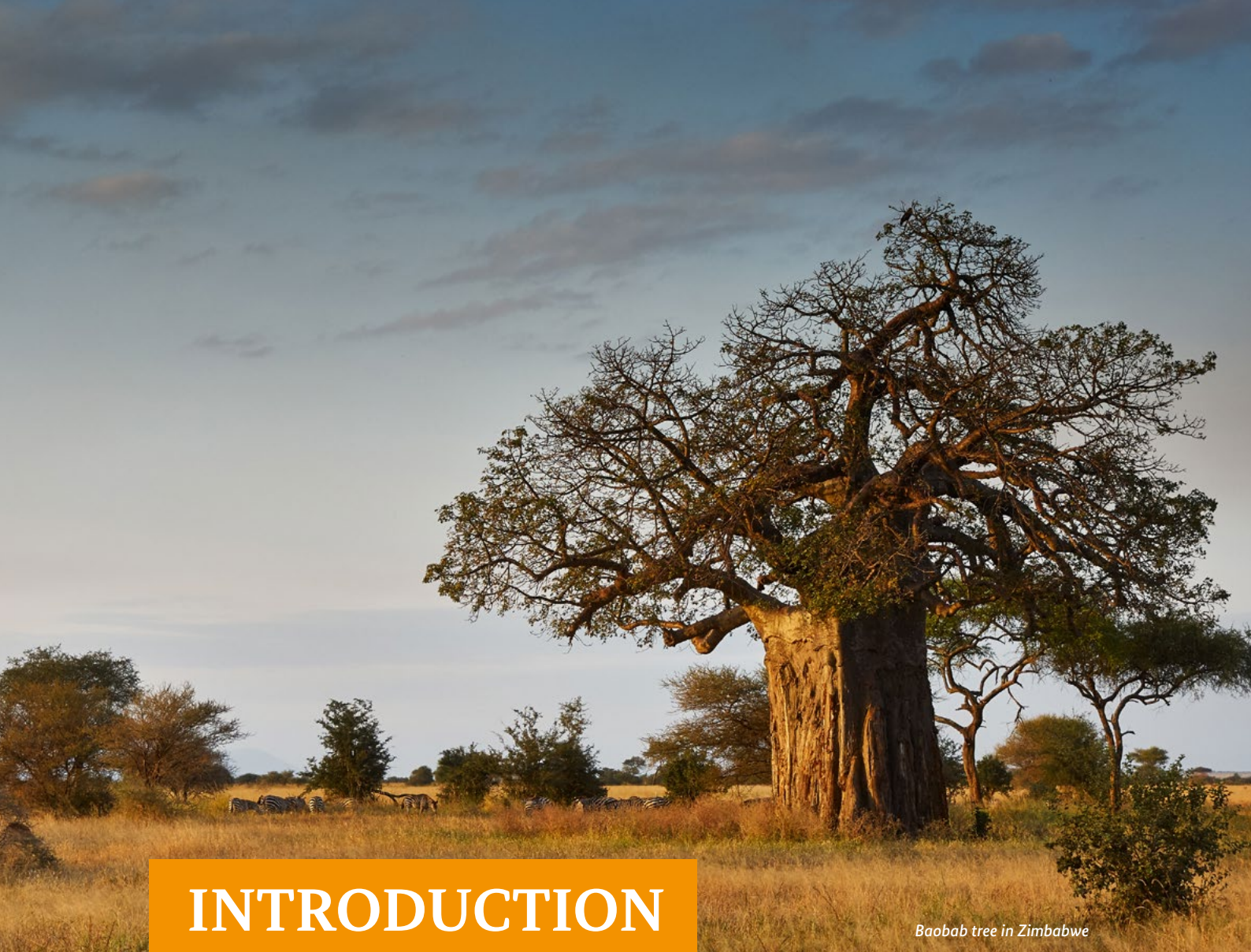
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# INTRODUCTION

*Baobab tree in Zimbabwe*

This Regional Market brief is part of a series with 12 Market briefs. They include information on the status of the organic sector and on the development of organic agricultural production and trade. They also provide deeper insight into how the organic market is organised: supply and demand dynamics including trends, supporting functions available and rules and regulations. All this is relevant information when trading with or in African organic markets.

The objective of the Market briefs is to inform national, regional and international specialists and interested public about the potentials of trade in organic products in and with African countries. The insights gained will facilitate the identification of possible interventions and opportunities and help to further build the organic sector in Africa.

This Market brief focuses on the organic market of the five regions in Africa. The complete series includes the following Market briefs:

**1 Regional Market brief** covering the 5 regions of the African continent: Southern, Eastern, Central, West and North Africa.

**8 Country Market briefs** covering the countries: Burkina Faso, Egypt, Kenya, Morocco, South Africa, Togo, Tunisia, Uganda

**3 Product Market briefs** covering the value chains: Coffee, Tropical fruits, Shea

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# Southern Africa

## Overview and development

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

The regional statistics for Southern Africa are noteworthy due to the wild collection area, which is significantly larger in comparison to the other African regions. Zambia, Namibia and South Africa each report over 1 million hectares (ha), with Zambia leading at 3.2 million ha. This is mostly related to beekeeping and the collection of devil's claw. On the other hand, in terms of organic agricultural land (both converted and under conversion), the Southern African region has only 111,000 ha out of almost 2 million hectares for Africa, with South Africa taking the largest share (82,800 ha) in the region.

The Research Institute of Organic Agriculture (FiBL, 2018) reports around 1,800 organic producers for Southern Africa. However, this is based on the number of farmer groups organised with operational internal control systems (ICS) and not on the number of single farmers/wild harvesters associated with each ICS. If single farmers were considered, this number would be considerably higher, given that for example one typical baobab wild collection operation in Zimbabwe has 5,568 organically certified wild collectors for one ICS. According to FiBL, 163 organic exporters exist in the region, while Ecocert's estimates indicate 350-400 exporters.

Organic agriculture is not new to Southern Africa. The first wave of early adopters in the 1980s and 1990s were primarily engaged in small-scale farming, although there were a few notable large-scale producers (e.g. Pirimiti in Malawi). Gradually these early adopters have been replaced by a new generation of producers that are driven by large-scale commercial interests. In parallel, the production of wild harvested natural ingredients, driven by organisations like PhytoTrade Africa, has grown significantly.

The organic sector in the various countries is organised and supported in various ways, but is hardly co-ordinated at the regional level. The IFOAM<sup>1</sup> Southern African Network (ISAN) was established in order to develop and unite organic agriculture in the region<sup>2</sup>.

ISAN is also collaborating with the Knowledge Hub for Organic Agriculture in Southern Africa (KHSA) as part of the Knowledge Centre for Organic Agriculture in Africa (KCOA) project. KHSA operates from Zambia lead by the [Sustainability Institute](#) in partnership with [PELUM Zambia](#). Further countries of intervention are South Africa (lead by the [South African Organic Sector Organisation](#)) and Namibia (lead by the [Namibian Organic Association](#) and [Namibia Nature Foundation](#)). Malawi will also shortly be integrated.

In general, South Africa, Malawi, Namibia, Zambia and Zimbabwe are most active in the field of organic agriculture, having programmes implemented by non-governmental organisations (NGOs), guideline development, exports, and certain government support. NGOs are also active in Mozambique, but there are no guidelines or other support. Botswana, Eswatini and Lesotho are characterised by little institutional capacity, no government support and no export activities. The further analysis only describes the most active countries. A separate market brief for South Africa is available as part of this series.

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

<sup>1</sup> IFOAM - Organics International is the worldwide organic umbrella organisation. The abbreviation stands for: International Federation of Organic Agriculture Movements.

<sup>2</sup> Willer et al. (2020). The world of organic agriculture.

<sup>3</sup> Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks and knowledge exchange. More information can be found here: [www.ifoam.bio/pgs](http://www.ifoam.bio/pgs)





*Fresh Marula fruits from Malawi*

The **Namibian** Organic Association (☛**NOA**) is a dynamic organisation which has developed organic standards based on the IFOAM standards and has also supported the emergence of PGS<sup>3</sup>. According to NOA, organic livestock management is in its infancy, with few farms certified organic by the organisation. The NOA has been pro-active in lobbying the government and international NGOs, and there is broad support for mainstreaming organic agriculture in Namibia. A variety of organic products origins from wild collection on more than 1 million hectares. The most important one is devil's claw, an internationally renowned herbal medicinal plant.

In 2017, **Zambia** had the second-largest area of land under organic wild harvesting in the world (nearly 6 million hectares). Much of this area was devoted to beekeeping in the expansive North-Western Province of the country. However, this declined by nearly 50% in 2018 to 3.2 million hectares. The country has experienced a move away from certified organic agriculture by numerous farmers in recent years. This is partly due to a perception issue around the superior yields of conventional farmers, but also related to the inactiveness of the once vibrant Organic Producers and Processors Association Zambia (☛**OPPAZ**). Whilst Zambia is best known for its

innovative conservation farming practices (promoted by the Conservation Farming Unit), the Zambia Alliance for Agroecology and Biodiversity (☛**ZAAB**) and Kasisi Agricultural Training Centre (☛**KATC**) have been actively promoting the adoption of agroecology practices, including demonstration sites.

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





Woman harvesting organic vegetables in Zambia

## Southern Africa organic production

### Infographic 1: Southern African organic production



Organic certified agriculture land:

**111,643 ha**



Organic certified other areas  
(wild collection):

**7,066,313 ha**



Percentage of Agriculture (% organic  
agriculture land in total agriculture land):

**0.05%**



Organic producers:

**1,806**

**Table 1: Products and production in Southern Africa**

Products	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Medicinal and aromatic plants (MAP) from wild collection	a) 2,749,491	c) 7,500	n/a.	
Forest honey	a) 2,500,000	a) 825	d) 1.7 million	d) Assumption: all honey at EUR 2/kg
Coconut (partly wild collection)	a) 785,000	a) 3,500	n/a.	
Nuts (Mongongo, wild collection)	a) 700,000	c) 200 <sup>4</sup>	n/a.	
Cereals	a) 5	n/a.		
Fruit (wild collection, marula, ximenia)	a) 282,002	c) 1,800 <sup>5</sup>	n/a.	
Baobab (wild collection)	a) 28,000	a) 140	n/a.	
Sugar cane	a) 9,736	a) 72,000	n/a.	
Rose hips (partly wild collection)	a) 21,788	n/a.	n/a.	
Oilseeds	a) 12,092	n/a.	n/a.	
Bee products	n/a.	a) 1,646	n/a.	
Fresh vegetables	a) 1,352	a) 3,339	n/a.	
Tea (partly wild collection)	a) 4,658	n/a.	n/a.	

a) Research Institute of Organic Agriculture (FiBL) 2018 statistics b) other statistics c) resource person's estimates d) own estimates.

Infographic 1 and table 1 show the importance of wild collection in Southern Africa (medicinal and aromatic plants, forest honey, nuts, fruits, baobab, bee products, coconut, rose hips, tea). Of the wholly farmed products, oilseeds and sugar cane form the largest production areas, followed by tea and fresh vegetables. The growth in production from wild collection reflects the increasing demand for non-traditional organic products, feeding into the fast-growing global wellness industry. Furthermore, wild collection operations are perceived as having strong fair-trade credentials, appealing to the new generation of ethical consumers. Wild collection in Southern Africa is likely to continue experiencing upward growth for several years to come, with new products, ingredients under development, and new marketing approaches being tried out (e.g. efforts to get marula oil registered as a novel food within the European Union (EU), which could unlock a sizeable new market for organic marula oil).

Both the expansion of existing organic production and the progressive conversion from conventional to organic agricultural products offer long-term opportunities. Organic livestock products are likely to have a high potential. The overlapping concepts of "grass-fed" and "organic" have seen substantial growth in organic beef production in Australia. This could be replicated in Southern Africa, where large rangeland areas in the rather arid west of the region favour extensive livestock production. Another opportunity, confined at present to three countries in the region, relates to organic hemp and/or cannabidiol (CBD) products, with South Africa, Lesotho and Zimbabwe having recently licensed the production of hemp/marijuana under carefully controlled conditions. Zimbabwe in particular is expecting rapid growth in this sector, although none of the Zimbabwean producers are currently exploring options for organic certification thus far. In South Africa, on the other hand, producers have started to seek certification.

<sup>4</sup> Estimated quantities of fresh plant material as follows: devil's claw: 600 tonnes, baobab fruit: 2,500 tonnes, tagetes plants: 100 tonnes, kigelia fruit: 20 tonnes, resurrection bush: 50 tonnes, strophanthus pods: 20 tonnes aloe ferox leaf material: 1,600 tonnes, essential oil plants: 2,500 tonnes

<sup>5</sup> Estimated quantities of wild collected fruit as follows: marula 1,500 tonnes, ximenia 300 tonnes

Other currently conventional exports suitable for conversion to organic would include tea and coffee (Malawi, Mozambique and Zimbabwe), horticultural produce (Zambia, Malawi, Zimbabwe, Mozambique and South Africa), cut flowers (Zambia, Zimbabwe,

Mozambique and South Africa), citrus fruits (South Africa), macadamia nuts (South Africa, Zimbabwe, Mozambique, Malawi) and avocados (South Africa, Zimbabwe, Mozambique, Malawi).

## Southern Africa organic market

Infographic 2: Southern African organic market



Main products for interregional export markets:  
**Medicinal and aromatic plants, honey, coconut, sugar cane, cereals, rose hip, tea, oilseeds, and fresh vegetables**



Main products for domestic and regional markets:  
**Fresh vegetables, honey, medicinal and aromatic plants, tea and cereals**



Total volume of the exports:  
**27,745 tonnes to EU in 2019 & 86 tonnes to USA in 2019**



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



Number of operators that are exporting from Southern Africa:  
**163**



The organic market within Southern Africa is small, and skewed towards South Africa, which serves both as an end market for other Southern African countries and as a transit route through which re-exports take place. South Africa imports raw materials from its neighbouring countries (and other African countries), processes them at dedicated organic production facilities and then exports value-added produce. This is largely due to the infrastructure available in the country, which makes it more cost-effective for operators in the region to send their produce to South Africa for processing than to process in their own countries.

Organic products available to consumers in South Africa are diverse (from fresh produce to cosmetics

and even pet food) and domestic demand is growing rapidly. However, the markets in the other countries of Southern Africa primarily register demand for organic fruits and vegetables with a growing interest in cosmetics and personal care products.

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



*Man selling fruits and vegetables at a market in Zambia*

## Conclusions

Southern Africa is a region of enormous disparity, combining Africa's second largest (South Africa) with some of its smallest and poorest economies. This disparity is reflected in the statistics, with 75% of the region's organic exporters based in South Africa, collectively responsible for nearly 92% of the region's organic exports to the EU. Despite this disparity, South Africa can serve as both, a major producer and consumer of organic produce in the region and thus a potential trade partner for other countries that in turn could drive growth in the organic sector across the whole region and the African continent.

Local demand for organic produce is limited in most countries within the region (except for South Africa), and awareness levels amongst consumers of the benefits of organic produce are low. In recent years, local demand for organically grown food has grown as a result of health concerns. However, most local consumers are not yet sensitised to differentiate between self-claimed and independently verified organic status. This can discourage growers from investing in certification and lead to exporters being the only certified organic growers. The situation is different in South Africa, where local demand for organic produce is consistently said to outstrip supply. A threat to organic production in the region comes from the widespread perception that yields for organic agriculture are lower than those for conventional agriculture, although long term research in South African has proven this assumption to be untrue. In a region where food security is threatened by regular and increasingly frequent cycles of drought, yields are an overwhelming concern for most farmers. Large-scale agribusinesses have an entrenched resistance to organic agriculture as they continue to place heavy emphasis on the use of synthetic fertilisers, genetically modified organisms (GMOs) and biotechnology.

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

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

Overall, the significant growth potential of the organic sector in Southern African is evident. The increasing awareness about the health benefits of organic produce will drive rapid growth in local demand. At the same time, the opportunities in a post-COVID world for tapping into the global market for natural products will inevitably fuel increased supplies of new and existing ingredients from wild collection. Despite the enduring infrastructural challenges, the future of organic production and consumption in the region looks promising.





Agricultural terraces near  
Nyungwe National Park, Rwanda

# Eastern Africa

## Overview and development

According to the Sahel and West Africa Club/Organisation for Economic Co-operation and Development (OECD), the East Africa region includes the countries of Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Mauritius, Rwanda, Seychelles, Somalia, South Sudan, Sudan, Tanzania, and Uganda. Eastern Africa can be considered heterogenous in terms of agroecological zones, ranging from dry zones to very productive agricultural highlands and valleys.

Parts of the organic movement in the Eastern Africa region are well organised, with active National Organic Agriculture Movements (NOAMs) in Burundi (☛ [Burundi Organic Agriculture Movement – BOAM](#)), Kenya (☛ [Kenya Organic Agriculture Network – KOAN](#)), Rwanda (☛ [Rwanda Organic Agriculture Movement – ROAM](#)), Tanzania (☛ [Tanzania Organic Agriculture Movement – TOAM](#)) and Uganda (☛ [National Organic Agricultural Movement of Uganda – NOGAMU](#)). The island countries also have an active local organic movement, with Mauritius aiming to transform the island into an organic


island. The same is the case for Zanzibar in Tanzania that focuses on organic spices including for export purposes. Apart from that and from organic sugar from Mauritius and various products from Madagascar, the organic production on the islands is not export-oriented. In terms of organic movements on the islands, in Madagascar there is an umbrella organisation (☛ [Syndicat Malgache de l'Agriculture Biologique – SYMABIO](#)) and a small, active trade group of vanilla agriculture operators (☛ [Produits Malgaches Biologiques – PROMABIO](#)). For the other countries, with a young history of organic farming and limited export numbers, no active national movements exist. Organic coffee production and exports in Ethiopia have been increasing as a result of falling global coffee prices. It is expected that the Ethiopian sector will get organised to promote organic agriculture on the national level in the coming years.

Certification Bodies (CBs) are active in all countries, but only a few local certification bodies such as EnCert in Kenya exist.



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

- Export Promotion of Organic Products from Africa (EPOPA), OSEA (Organic Standards and Certification Capacity in East Africa) and Organic Trade and Value Chain Development in East Africa (OTEA) running between 1997-2019 (funded by the Swedish International Development Cooperation Agency, Sida)
- Initiative on Ecological Organic Agriculture (EOA-I), since 2014 (funded by the Swiss Agency for Development and Cooperation and the Swedish Society for Nature Conservation)
- KCOA, since 2019 (funded by the German Development Cooperation)

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

However, none of the East African countries has updated its national standards' catalogues to include the revised EAOPS. Most governments in the region prefer to have organic agriculture to be mainstreamed in other aspects of agricultural development. The recognition and use of the East African Organic Mark 'Kilimohai' in the region have remained rather low. Most products are traded in open markets (most preferred according to a consumer survey) with direct producer-customer relations. Premium prices are not generated through the use of the organic mark and hence there are no incentives to use it<sup>6</sup>.

The KCOA implements a Knowledge Hub in Eastern Africa and involves four countries so far: Uganda, Kenya, Rwanda, and Tanzania. Madagascar will shortly also be integrated. Biovision Africa Trust (BvAT) leads the project implementation together with the Participatory Ecological Land Use Management (PELUM) in Uganda as a co-host. Separate market briefs for Kenya and Uganda are available as part of this series.

<sup>6</sup> Sida (2019). Evaluation reports of the programme EPOPA and OTEA.



Women plucking tea leaves on plantation in Kenya





Beekeeper in Uganda

## Eastern Africa organic production

### Infographic 3: Eastern Africa organic production



Organic certified agriculture land:

**1,011,365 ha**



Organic certified other areas  
(wild collection):

**3,544,168 ha**



Percentage of Agriculture (% organic  
agriculture land in total agriculture land):

**0,56%**



Organic producers:

**636,795**

**Table 2: Organic products and production in Eastern Africa, in 2018:**

Products	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Apiculture	a) 2,525,441	a) 1,022	d) 2 million	d) Assumption: all honey at EUR 2/kg
Gums	a) 864,902	a) 7,083	d) 21 million	d) Assumption: EUR 3/kg
Coffee	a) 310,001	a) 58,360	d) 128 million	d) Assumption: EUR 2.2/kg
Sesame	a) 71,923	a) 19,501	d) 21 million	d) Assumption: EUR 1.1/kg
Medicinal and aromatic plants (cultivated)	a) 47,427	a) 127,134	n/a.	
Macadamia	a) 50,537	a) 70,000	n/a	
Cashew nuts	a) 19,245	a) 20,000	d) 168 million	d) Assumption: EUR 8.4/kg
Tropical fruit	a) 21,273	a) 53,962	n/a.	
Cocoa	a) 37,836	a) 17,007	d) 44 million	d) Assumption: EUR 2.6/kg
Cotton	a) 92,602	a) 2,557	d) 5 million	d) Assumption: EUR 2.0/kg
Tea	a) 1,627	a) 3,761		
Citrus fruit	a) 33	a) 1,050	n/a.	
Shea nuts	a) 79,090	n/a.	n/a.	

a) FIBL 2018 statistics b) other statistics c) resource person's estimates d) own estimates.

Some countries (Kenya and Uganda) have a long history of organic production. Ethiopia has significant organic production and a high number of organic farmers (more than 200,000 smallholders, with farms comprising on average 1 ha). They produce organic coffee, sesame, honey and other products (e.g. beeswax, pineapples, cereals, apples, cactus

figs, corn and mango). Some 200,000 ha (0.5% of agriculture land) of the Ethiopian land is managed organically, and the sector is growing. Lack of knowledge and infrastructure hamper increased exports. Processing of organic foods is yet to be strengthened in order to untap the potential.

### The most important organic products and countries:

- **Honey & beeswax:** Kenya, Uganda, Tanzania, Ethiopia
- **Gums & resins, and oils thereof:** Uganda, Kenya, Ethiopia
- **Coffee:** Kenya, Tanzania, Ethiopia, Uganda, Rwanda
- **Sesame:** Ethiopia
- **Cashew:** Tanzania, Kenya, Uganda
- **Tropical fruit:** Kenya, Uganda, Rwanda, Tanzania
- **Tea:** Kenya, Rwanda, Tanzania
- **Cocoa:** Uganda, Tanzania, Madagascar
- **Cotton:** Ethiopia, Uganda, Tanzania







Organic farmers market in Uganda

## Eastern Africa organic market

Infographic 4: Eastern African organic market



Main products for interregional export markets:  
**Coffee, nuts (cashew nuts, macadamia), medicinal and aromatic plants, tea, cotton, cocoa, sesame, gums**



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



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



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



Number of operators that are exporting from Eastern Africa:  
**323**

The trade activities in organic agriculture vary greatly. There is regional trade between Kenya, Uganda and Tanzania, but figures are not available. Markets are not coordinated, standardised or transparent; systematic national and regional data are not available. Information mostly comes from impressions of resource persons.

Export markets dominate organic trade in the region, with dynamic growth because of increased demand. Local sales are based on self-claims (“natural”) or on PGS. In Uganda, Kenya, as well as in Ethiopia and Rwanda, local markets are increasing but need further concerted effort to reach scale beyond traditionally stronger export products and pioneer initiatives. In Ethiopia, the Institute for Sustainable Development (ISD) has laid a ground to start PGS. Even if the domestic market in Ethiopia is still at an infant stage, a monthly organic bazar is organised in Addis Ababa. Supplies of non-certified organic pineapple, cactus and mango juice, jams and cosmetics are reported to be sold to major retailers and supermarkets.

In the retail sectors in Eastern African countries, organic produce is rare. In informal local (‘wet’) markets, distinction between conventional and organic produce is difficult and verification of organic is unclear. Nevertheless, consumer demand for safe products can be a way for local organic markets to grow, and also give farmers a better return on their hard work with fair prices.

## Conclusions

While Eastern Africa as a region used to be quite strong in organic production and trade, growth slowed down in comparison with other African regions. Demand continues to exist, but a non-conducive trade and support environment might have limited growth.

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

Apart from EOA-I, the network of regional Knowledge Hubs for Organic Agriculture in Africa, implemented by GIZ and local NGOs could be instrumental to address the shortfall of available data and organic knowledge in the organic sector in Eastern Africa. Unlocking the potential of organic agriculture requires in-depth understanding of ecological interrelationships and extensive knowledge of practices in agricultural production, processing and marketing.

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

The outcomes of the several (national) trade fairs in the region are not reported or monitored. Functional trade platforms for the organic private sector are unknown, except for certain networks and associations. It should be a high priority to attract the private sector as a driver for developing organic markets and to help set the stage for national policies (regarding products and markets, diversification and value addition/processing).





Local market near  
Batoufam, Cameroon

## Central Africa

### Overview and development

In this publication, Central Africa includes the countries of Angola, Cameroon, the Central African Republic, Chad, the Democratic Republic of Congo (DRC), the Republic of the Congo, Equatorial Guinea, Gabon and São Tomé and Príncipe.

Of these countries, only DRC, São Tomé and Príncipe, Cameroon and Chad have certified organic areas. While DRC and São Tomé and Príncipe only have organic agriculture land and Chad only has wild collection areas, Cameroon has both.<sup>7</sup> However, there are scattered production initiatives in other countries, too. Examples include honey production in the Republic of Congo<sup>8</sup>, local (non-certified) organic vegetables in Brazzaville from 380 producers<sup>9</sup> or the Dulce Maria farm in Angola producing according to organic principles and permaculture on 5,000 ha.

The DRC<sup>10</sup> has the most developed organic trade in Central Africa with 30,000 producers, 22 processors and 19 exporters, which are mostly donor-supported cocoa (>80%) and coffee cooperatives that sell on the global market. However, the country has no specialised organic institutions and no organised national organic movement. The Djolu Agro-Pastoral Development Centre (Centre de Development Agro Pastoral de Djolu, CEDAP) is a non-profit organisation that promotes amongst others organic agriculture in the eastern part of the DRC. While trade governance and security in the country overall is rated as very problematic, the country has great potential with high biodiversity, a lot of fallow, fertile land, and a population that needs opportunities and income.

<sup>7</sup> Willer et al. (2020). The world of organic agriculture.

<sup>8</sup> Queen B is a Congolese company specialised in organic honey: <http://queenb.pro/>

<sup>9</sup> Loubou, Q. (2018). Agriculture : des maraîchers produisent des légumes bio à Brazzaville.

<sup>10</sup> Malu-Malu, M. D. (2017). Agriculture: le Congo se met de plus en plus au bio.



São Tomé and Príncipe even has a 100% organic strategy<sup>11</sup> in place and sells a high share of its cocoa exports as organic and fair trade. It was supported through a project by the International Fund for Agricultural Development (IFAD) and is now also part of the West Africa project Organic Markets for Development of IFOAM-Organics International. With 22.5%, it has the highest share of organic agriculture land in Africa and is 4<sup>th</sup> in the world. The main export product is cocoa produced and marketed through cooperatives. The tourism industry and ecosystem services offer further marketing opportunities.

Cameroon is the only Central African country with a small organic agriculture movement. Its history goes back to 1996, when organic trade began and an association for the promotion of organic agriculture called EXA biologique was created.<sup>12</sup> Cameroon is also part of the African Organic Network (AfrONet) and it planned to host the African Organic Conference in 2018. However, it did not manage to convene it and the conference was moved to Senegal. The movement has come up with innovative ideas (e.g. marketing of traditionally reared and fed chicken for a good price as it is considered being more natural and tastier), but it never managed to be a convening force for the sector. With 1,000 ha

agriculture land and 40,000 ha of wild collection area, 500 producers and 19 exporters, the sector is relatively small. Various development projects (World Bank, French Agricultural Research Centre for International Development (CIRAD) / National Institute for Agricultural Research (INRA), Food and Agriculture Organisation of the United Nations (FAO), GIZ, Bread for the World / Brot für die Welt) supported research and innovations e.g. at CIRAD. Attempts for an organic regulation (2006 and 2009) haven't led to a result yet.

There is not a lot of information about organic in Chad available but there seems to be an informal network of environmental NGOs and organic stakeholders active in wild collection on 120,000 ha who are marketing their products to 4 exporters. There are also local organic producers who sell their products on a Saturday morning market in N'Djamena. In conclusion, Central Africa is the least developed organic region in Africa, with a few countries starting to develop organic production and marketing. The continental movement is challenged to realise the opportunities, to convey the learnings from other countries and to include this part of the continent into the developments. The Knowledge Hub for Organic Agriculture in Central Africa of the KCOA project has been launched in 2021.

<sup>11</sup> Lazaro, J. / Neto, Rocardo (2020): Ministro da Agricultura testemunha assinatura de protocolo "100% Biológico" para garantia da segurança alimentar

<sup>12</sup> FAO (2001). World Markets for Organic Fruit and Vegetables – Opportunities for Developing Countries in the Production and Export of Organic Horticultural Products. Cameroon.



*Farmer tilling land in Cabinda, Angola*

## Central Africa organic production

### Infographic 5: Central African organic production



Organic certified agriculture land:

**72,811 ha**



Organic certified other areas  
(wild collection):

**166,800 ha**



Percentage of organic agriculture land in  
total agriculture land:

**High in São Tomé and Príncipe (22%)**

**and low (0.1-0.2%) in other countries**



Organic producers:

**34,250**

**Table 3: Products and production in Central Africa**

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

a) FIBL 2018 statistics b) other statistics c) resource person's estimates d) own estimates



Production in Central Africa emerges on the following four levels, the first two being the most relevant for trade development:

1. Commodity production for export. This applies to São Tomé and Príncipe, the DRC and to a small extent also to Cameroon, and concerns mostly cocoa and coffee production by cooperatives, and potentially tropical vegetables and fruits for the international processing industry.
2. Rare and high value wild collection products that have an international market, such as gums and resins. This is a business model in Cameroon and Chad.
3. Local production that we can call “organic by default”. These are producers applying farming methods that could be considered organic.
4. Individual initiatives that introduce non-certified organic by design either on a single farm or in a cooperation with a group of farmers.

The organic market in Central Africa can be difficult to assess, but there is international (certified) and national (non-certified) trade going on. The only PGS in the region is under development in Cameroon. Apart from the local trade with no differentiation between organic and conventional products, direct marketing and farmers markets are emerging and particularly target people concerned about food safety and wealthier segments in cities. Such initiatives take place in Angola, Cameroon, Chad and the Republic of Congo.

## Conclusions

Organic in Central Africa is still in an early phase although there is considerable potential and several farmers already applying (certain) organic farming practices but not marketing their produce as such. Fragile political stability, incidences of war and terrorism, unreliable governance and institutional infrastructure make it difficult to invest in and develop organic systems, which tend to be complex. Thus, the focus of organic development support ought to lie first in food security and building resilience for smallholder family farmers and local consumption with the opportunity to generate income. On a sector level, development projects should take learnings and knowledge e.g. from the Organic Africa Training Manual from the organic institutions in the neighbouring regions (e.g. West Africa) to support awareness at production and market levels. Development organisations may also support building farmer families’ resilience and their farm developments from “organic by default” to “organic by design”. However, by doing so, the usual strategy of using price premium as engine of development wouldn’t work and other drivers for more sustainable farming must be used (e.g. prevention of soil erosion or diversified, healthy nutrition for the farmer families). Smart local and informal trade in specialty value chains could also support resilience and economic developments of farmers.

At the same time, in combination with focusing on the mentioned two levels of production (export-oriented production of cocoa, coffee and processed tropical fruits, as well as medicinal and aromatic plants from wild collection), promising entrepreneurs should be supported when investing in setting up production, processing and exports.



*Farmer holding cocoa pod, Cameroon*

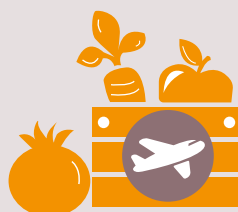




Bananas on a truck in Congo

## Central Africa organic market

Infographic 6: Central African organic market



Main products for interregional export markets:  
**Gum acacia, cocoa, honey**



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



Total volume of the exports:  
**13,826 tonnes to EU in 2018**  
**& 398 tonnes to USA in 2019**



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



Number of operators that are exporting from Central Africa:  
**48**

# West Africa

## Overview and development

The West Africa region includes the countries of Benin, Burkina Faso, Cape Verde, Ivory Coast, Gambia, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, and Togo. The region is very heterogeneous in terms of agroecological zones: Whereas the north is dry and hot, rainforests are found along the coasts in the south.

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

Compared to the other regions, West Africa provides a mixed picture when it comes to the organic sector. There is no country with an own regulation and only Burkina Faso and Senegal made serious attempts to develop local or national standards on their own. Most countries have no reference to organic in their agriculture policies and few measures are taken to promote organic agriculture. Exceptions are the organic desk in the ministry of agriculture and mention in the national investment plan in Ghana or the inclusion in the subsidy policy in Burkina Faso.

In no other region in Africa, the discussion on agroecology is as much advanced as in West Africa, particularly in the French speaking countries, where specialised NGOs lead the discussion and actively advocate. The organic movement is organised in the West Africa Organic Network (☛**WAfrONet**), which is registered in Senegal. The secretariat is presently hosted by the Senegalese National Federation for Organic Agriculture (☛**FENAB**). The network was created based on the inspiration of the East African

Standard in 2007. A first regional conference of stakeholders took place in Abeokuta in Nigeria in 2008 followed by biannual regional conferences. The last of these conferences were held in Mali in 2017 and in Ghana in 2019 with about 300 participants. West Africa also hosted the Continental African Organic Conferences 2018 (in Senegal) and 2015 (in Nigeria).

The West African region is supported by different donor-funded projects, of which the following four are relevant in this context:

- The ☛**EOA-I** covers Nigeria, Benin, Mali and Senegal. It aligns its outputs with the Comprehensive Africa Agriculture Development Programme – ☛**CAADP** (Africa's policy framework for agricultural transformation) and addresses institutional infrastructure, knowledge, value chains and integration into national and regional policies.
- The Economic Community of West African States (☛**ECOWAS**) implements the West Africa Agroecological Transition Support Project (☛**PATAE**) supported by France covering 5 countries, namely Burkina Faso, Mali, Senegal, Ivory Coast and Togo to transition to agroecological intensification. It plans to extend to all 15 ECOWAS countries.
- The Organic Markets for Development (☛**OM4D**) project, implemented by IFOAM-Organics International and Agroeco, covers Burkina Faso, Togo and Ghana. It promotes local and international markets and supports organic institutions in the target countries.
- As part of the KCOA project, the Knowledge Hub for Organic Agriculture in West Africa operates from Senegal with the lead of ENDA Pronat. The hub collects, verifies and disseminates knowledge and is implemented in cooperation with partner organisations in Senegal, Mali, Gambia, Benin and Nigeria.



Some of the countries in the region have a strong national organic umbrella organisation including Nigeria, Burkina Faso and Senegal and to some extent also Ghana, Benin, Mali and Togo (the latter since end of 2019). Except for Nicert in Nigeria, all certification bodies operating in the region are international with Ecocert having a chapter in Burkina Faso. Other support functions such as advisory services, research (e.g. soil science research at the University of Ibadan in Nigeria or at the Forum for Agricultural Research in Africa) or vocational training (Ghana Institute of Organic Farming) exist. There are local (e.g. Songhai Centre in Benin) and international NGOs (e.g. Groundswell in Ghana) promoting ecological organic agriculture.

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

Separate market briefs for Burkina Faso and Togo are available as part of this series.

*Women processing shea nuts near Ouagadougou, Burkina Faso*







Farmers weeding lettuce beds near Bamako, Mali

## West Africa organic production

### Infographic 7: West African organic production



Organic certified agriculture land:

**374,974 ha**



Organic certified other areas (wild collection):

**383,264 ha**



Percentage of organic agriculture land (of total agriculture land):

**0,39%**



Organic producers:

**107,117**



**Table 4: Products and production in West Africa**

Products	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Cocoa	a) 74,215	a) 10,217	d) 27 million	d) Assumption: EUR 2.6/kg
Cashew nuts	a) 70,983	a) 11,193	d) 94 million	d) Assumption: EUR 8.4/kg export price
Soybeans	a) 44,874	a) 74,910		
Coffee	a) 37,709	n/a.	n/a.	
Sesame	a) 24,010	a) 3,937	d) 4 million	d) Assumption: EUR 1.1/kg export price
Tropical fruit	a) 16,607	a) 105,750	n/a.	
Cotton	a) 9,452	a) 3,035		
Medicinal and aromatic plants (cultivated)	a) 3,889	a) 1,804	n/a.	
Shea nuts (wild collection)	a) 245,563	a) 11,635	d) 7 million	d) Assumptions: 30% shea butter yield and EUR 2/kg export price for shea butter <sup>13</sup>
Baobab (wild collection)	a) 78,738	a) 674		
Medicinal and aromatic plants (wild collection)	a) 1,500	a) 2	n/a.	

a) FiBL 2018 statistics b) other statistics c) resource person's estimates d) own estimates.

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

- **Tropical fruits including juices and pulps of mainly pineapples, mangoes, bananas and papayas** (e.g. Togo, Sierra Leone, Ivory Coast, Benin and Burkina Faso)
- **Coffee and cocoa** (Ghana, Togo, Ivory Coast)
- **Cashew nuts** (Burkina Faso, Mali, Senegal, Ivory Coast, Benin, Ghana)
- **Cotton** (Mali, Burkina Faso)
- **Shea butter** (Burkina Faso, Ghana, Mali)
- **Wild collection products such as medicinal and aromatic plants, moringa, baobab, etc.**



<sup>13</sup> Most exported value comes from shea butter that is locally processed.



Processing cashews

### West Africa organic market

Infographic 8: West African organic market



Main products for interregional export markets:  
**Tropical fruits, cocoa, cashew nuts**



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



Total volume of the exports:  
**79,130 tonnes to EU in 2018  
& 422 tonnes to USA in 2019**



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



Number of operators that are exporting from West Africa:  
**303**



The main products that are exported are tropical fruits, cocoa, coffee, cotton, shea butter and medicinal and aromatic plants.

In various countries, e.g. Nigeria, Benin, Burkina Faso, Senegal, Ghana and Togo, local markets get attention from stakeholders, but those markets need time to reach scale beyond pioneer initiatives. Examples of local market initiatives are the 🍌 **Songhai Centre** in Benin or the 🍌 **Centre for Community-Based Farming Scheme (COBFAS)** under the Federal University of Agriculture in Nigeria. In Senegal, Burkina Faso, Benin, Togo and Nigeria, PGS are in place, but local trade with organic products that are not verified by third parties is also reported (e.g. in Mali or Ghana). In bigger cities such as Ibadan, Abuja, Lagos, Ouagadougou, Accra, Abidjan or Dakar, demand for organic products emerges particularly among wealthier and concerned middle-class populations and among expatriates. This trend is however rather occasional and unsystematic. Burkina Faso and partly Senegal developed a PGS strategy and have been building a local market from their national umbrella organisation. In Nigeria, the size of the local organic market is estimated at about EUR 1 million, mostly comprised of vegetables such as spinach, tomatoes and other local varieties as well as nuts, cereals, spices and herbs<sup>14</sup>.

While the region has more regional dialogue than any other organic region of Africa, evidence of regional organic trade between the West African countries can hardly be found. Even if there is a demand for certain products (e.g. for shea butter), there is little trust in unverified organic products that are traded over long distances.

## Conclusions

In conclusion, organic development in West Africa was behind other regions for a long time. However, it has emerged and the current development is dynamic. The factors that may have influenced this are good regional coordination – no other region has such an active regional network (WAfrONet) –, new project investments by donors, and increasing international demand particularly from Europe for export products combined with private sector activities of West African and European entrepreneurs.

At the same time, the organic sector in the region is not yet well rooted in consolidated national movements and the institutional support landscapes for essential functions such as quality management (e.g. laboratories), public relations or sector governance needs further development. Many activities are carried out, yet there is a need for transparent documentation, e.g. through directories and a certain alignment of the different initiatives. National action plans such as those initiated by the 🍌 **OM4D** project in Ghana, Togo and Burkina Faso may help. Institutional development needs to take place in parallel, otherwise there is the risk of developing export-oriented value chains that extract single commodities. This would be the opposite to a holistic system-oriented growth of communities, their livelihoods and sustainable environments.

Intercontinental trade is the engine of development and it is many times bigger than local, national or regional trade together. The trade facilitation for exports takes place within the value chains and usually happens directly either at/around BIOFACH in Nuremberg, Germany or through the initiative of the trading companies from Europe that are investing exclusively into their supply development. International value chains are not always transparent and the global traders are not actively involved in the national organic movements. Another problem is their concentration on few selected crops, leaving out others that are needed for biodiverse systems.

<sup>14</sup> WAfrONet (2020). Personal information.

# North Africa

## Overview and development

North Africa comprises of Egypt, Libya, Tunisia, Algeria, Morocco, West Sahara and Mauritania<sup>15</sup>. Tunisia, Egypt and Morocco all have strong organic sectors and trade. Libya and West Sahara have no figures on organic agriculture and in 2020, Mauritania emerged the first time in the organic statistics. Algeria is developing, has promising structures and approaches, however is still in an infant stage as statistics show little production and trade. North Africa is relatively wealthy and developed in comparison to other regions in Africa and makes one third of the gross domestic product of the continent. It is estimated that more than one third of all organic exports from Africa to the EU comes from North Africa.

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

Governments, organic movements and the private sectors have tailored their activities to market opportunities in Europe and the Middle East (and in case of Tunisian olive oil also to North America) and see organic as a source of income with premium prices rather than an engine of addressing environmental and social challenges. They focus on market requirements, especially compliance with public and private standards in the target markets. All North African countries promote their products at BIO-FACH in Nuremberg and at the Middle East Organic and Natural Product Expo in Dubai. National trade fairs took place in Morocco and Tunisia.

There seems to be little exchange between the countries of North Africa in terms of collaboration between institutions and trade relationships. North Africa looks more towards establishing trade relationships with the Mediterranean and less so with the rest of Africa. The Mediterranean Organic Agriculture Network (MOAN), launched 1999 in Bari/Italy at the International Centre for Advanced Mediterranean Agronomic Studies, includes the North African countries. In North Africa, the messages and requirements of the EU are more important than those of the African Union.

Organic sector developments in North Africa can serve as examples for other countries in Africa. North African countries (first Tunisia, then Morocco and recently Egypt) were the first to regulate the sector and establish own guarantee systems. Tunisia has the only African organic system that is recognised as being equivalent by the EU, UK and Switzerland. Tunisia takes a leading role in terms of issuing and implementing organic supporting policies and in sector governance. Morocco has established a strong organic umbrella organisation (FIMABIO) legitimised by the government, and Sekem, based in Egypt, has inspired many as an international flagship for social entrepreneurship.

We now see an increasing number of projects working both in the North and in other parts of Africa (e.g. analysis of internal control systems of FiBL or government support from Tunisia to Madagascar and Sudan). The Knowledge Hubs for Organic Agriculture of the KCOA project included North Africa in 2020 after having started with a sub-Saharan scope only.

Separate market briefs for Egypt, Morocco and Tunisia are available as part of this publication series.

<sup>15</sup> This list is based on the geographic regions of the African Union and its member states: [https://au.int/en/member\\_states/countryprofiles2](https://au.int/en/member_states/countryprofiles2).





Farm plots in fertile valley, Atlas mountains, Morocco

## North Africa organic production

Infographic 9: North African organic production



Organic certified agriculture land:  
**413,312 ha**



Organic certified area for  
wild collection:  
**380,515 ha**



Percentage of organic agriculture land  
(of total agriculture land):  
**n/a.**



Organic producers:  
**8,767**

**Table 5: Products and production in North Africa**

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

Source: a) FiBL 2018 statistics

In North Africa, 8,767 producers produce a wide range of products for the food, textile and body care products markets, in bulk, processed, and as final consumer products. Production is strongly oriented to the export market. Various strategies of operators have been identified:

- Production for bulk markets such as olive oil, oils from annual crops, and cereals, where producers compete internationally with a low price strategy for producing blends.
- Products with a climate advantage such as citrus fruits, dates or other subtropical fruits.
- Off-season products such as early potatoes. This is the case for vegetables, where North Africa sees an opportunity to compete with southern Spain for fresh vegetable production, however with the disadvantage of taking a day longer to reach the vegetable wholesale market in Perpignan, France.
- Specialty products such as medicinal and aromatic plants or long staple cotton for the industry.
- Specialty products for short chain and fairtrade markets such as dates, honey or nuts.



*Green olive branch in Tunisia*





Women preparing seedlings at Sekem Farm, Egypt

## North Africa organic market

### Infographic 10: North African organic market



Main products for interregional export markets:  
**Olive oil, medicinal and aromatic plants,  
 off-season vegetables and fruit, tropical fruit**



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



Total volume of the exports:  
**121,368 tonnes to EU in 2019  
 & 11,449 tonnes to USA in 2019**



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



Number of operators that are exporting from North Africa:  
**609**

More than 500 processors of organic food are reported for the North African countries. Compared to the other regions of Africa, a significant part of the processing and value addition of the local supply of organic raw materials takes place locally. While statistics are not always available, estimates of resource persons and own substantiated estimates based on qualitative information indicate that producers sell only a fraction organically and the rest as conventional products. Organic production is mostly for the export industry. There are only a few cases of domestic value chains or farmers that produce for short chain markets, e.g. farmers selling to retail, gastronomy or directly to consumers. Estimates from resource persons (online survey) indicate a domestic market value between 1 million and 10 million euros mainly for fresh produce (tomatoes, cucumber), medicinal and aromatic plants (mint) and fruits (grapes).

## Conclusions

In conclusion, North Africa is the most developed region in terms of organic production and international trade, but with limited organic trade relationships to the rest of Africa. It mainly targets markets in Europe and the Middle East owing to proximity and established connections. Favourable climatic conditions and potential for tourism is likely to see markets expand further. Governments and the private sector have recognised these opportunities and invest and develop – albeit still at a low level compared to other Mediterranean countries such as Turkey or Israel. Governments and the private sector build their institutions but depend on the developments of the export markets.

Domestic consumption is low, but there is a growing niche for affluent people and those worried about food safety issues. Organic shops are arising in the big cities (e.g. Cairo, Tunis, Casablanca, Marrakesh). Price premiums - which have been an engine of development in Europe - are very high (e.g. tripling or quadrupling the price), which indicates that the domestic markets are not well organised. National regulations in North Africa are not harmonised or recognised by other African countries, which creates non-tariff trade barriers. While there is a need for market facilitation and development on national and regional levels, it cannot be expected that regional mechanisms become effective soon. Regional collaboration needs to start with knowledge exchange and then move on to trade exchange.



*Farm worker harvesting oranges in El Nobraria, Egypt*