



SUSTAINABLE TRADE

Session 4

THE 2019
**EU AGRICULTURAL
OUTLOOK CONFERENCE**

Sustainability
from Farm
to Fork





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The African Union-Led Ecological Organic Agriculture (EOA) Initiative for Africa

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The Ecological Organic Agriculture (EOA) Initiative for Africa

To mainstream Ecological Organic Agriculture into national agricultural production systems by 2025 in order to improve agricultural productivity, food security, access to markets and sustainable development in Africa.

The Executive Council,

- TAKES NOTE** of the Report of the Conference of Ministers of Agriculture held in Lilongwe, Malawi on 28 and 29 October 2010 on Organic Farming, and **ENDORSES** the Resolution contained therein;
- EXPRESSES** concern over the current practice of exploitation of the organic farmers in Africa;
- REQUESTS** the Commission and its New Partnership for Africa's Development (NEPAD) Planning and Coordinating Agency (NPCA) to:
 - initiate and provide guidance for an African Union (AU)-led coalition of international partners on the establishment of an African organic farming platform based on available best practices; and
 - provide guidance in support of the development of sustainable organic farming systems and improve seed quality;
- CALLS UPON** development partners to provide the necessary technical and financial support for the implementation of this Decision;
- REQUESTS** the Commission to report regularly on the implementation of this Decision.



EOA INITIATIVE
ROLLED OUT IN
EIGHT AFRICAN
COUNTRIES
2015

EOA INITIATIVE
FORMED AND
PILOTED IN SIX
COUNTRIES
2012

DECISION ON
ORGANIC
FARMING
Doc. EX.CL/631
(XVIII)
2010

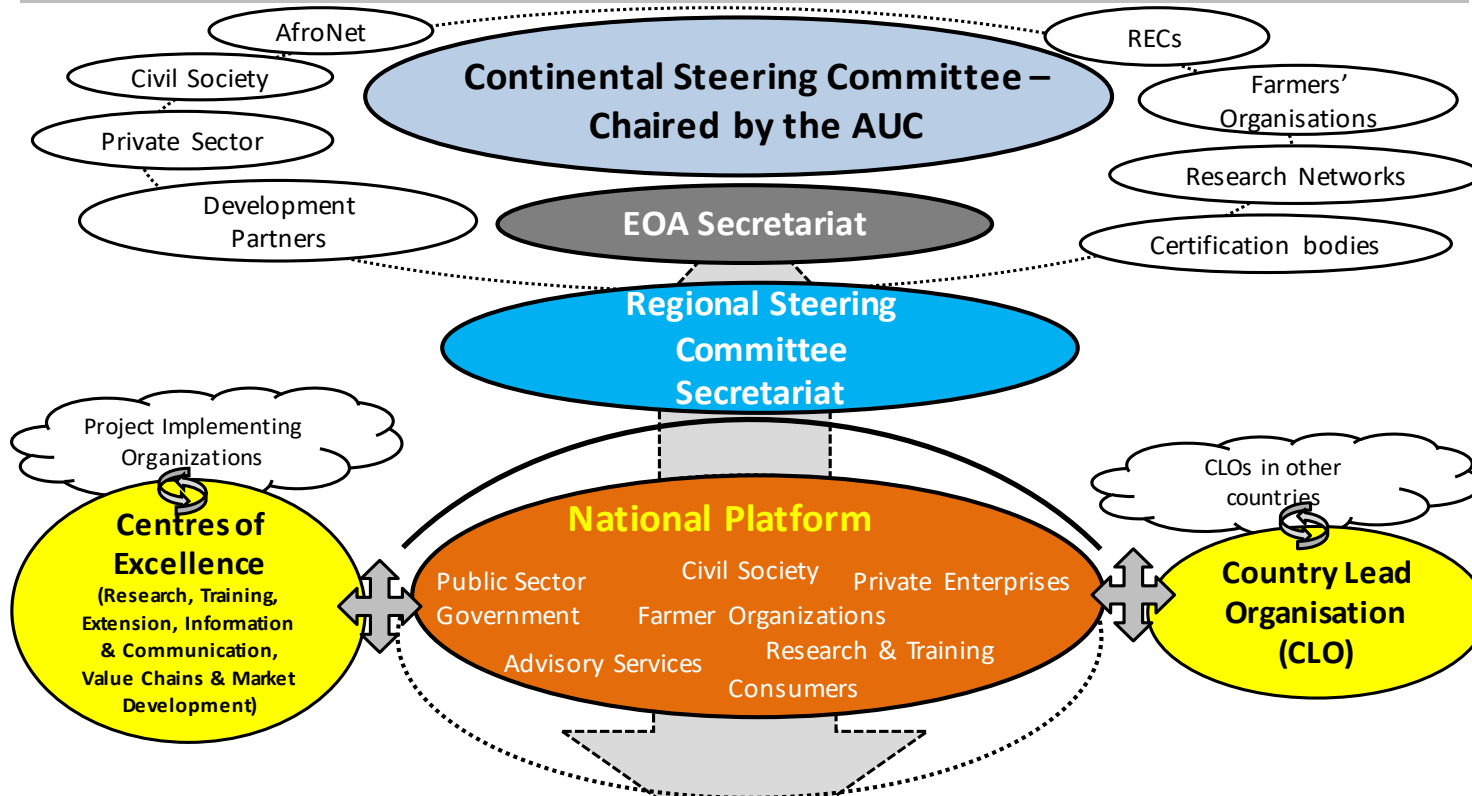
Currently implemented in 9 African countries.



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Institutional Set of the EOA Initiative



- EOA Implementation: **Mainstreaming EOA** in
- ... Policies, Strategies, Investment Plans
 - ... Standards, Certification
 - ... Research (agenda, methods)
 - ... Training (curricula & programs)
 - ... Extension (practices, information/communication)
 - ... Markets, Value Chains



Six Strategic Pillars

Research, Training & Extension

Responsible for investigating research and training gaps within the ecological organic agriculture value chains.

Value Chain & Market Development

Stimulate development of sustainable markets and increase trade in traditional and high value agricultural produce both at domestic and export levels.

Policy & Programme Development

Support the development and implementation of enabling policies and programs for EOA.

Information & Communication

Charged with awareness creation and strengthening EOA extension support systems.

Networking & Partnerships

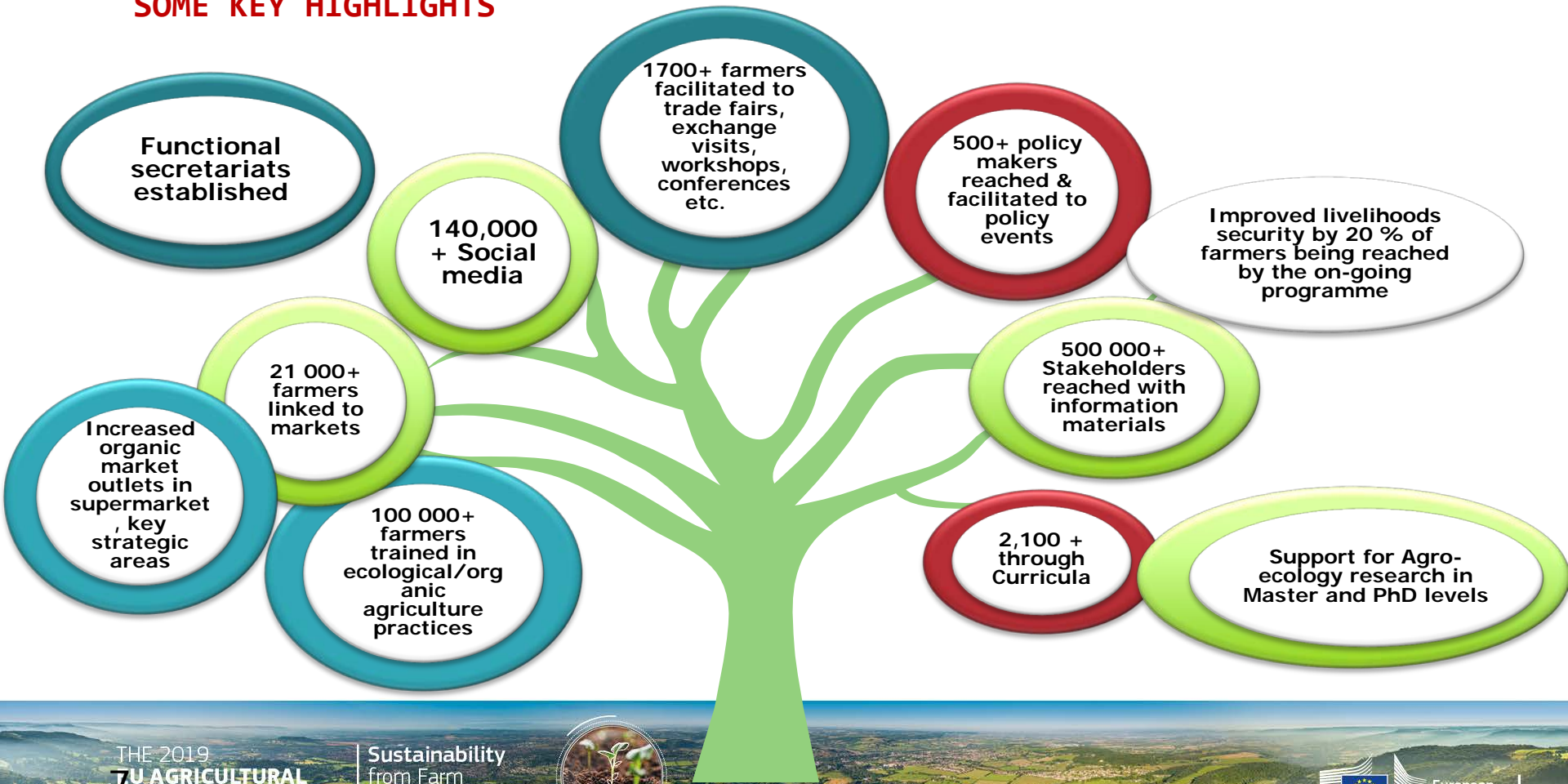
Engagement by relevant stakeholders including governments, farmers, civil society, private sector, and the international community.

Institutional Capacity Development

Equips professionals with skills and competences for community-based innovation and change processes for developing and supporting EOA.



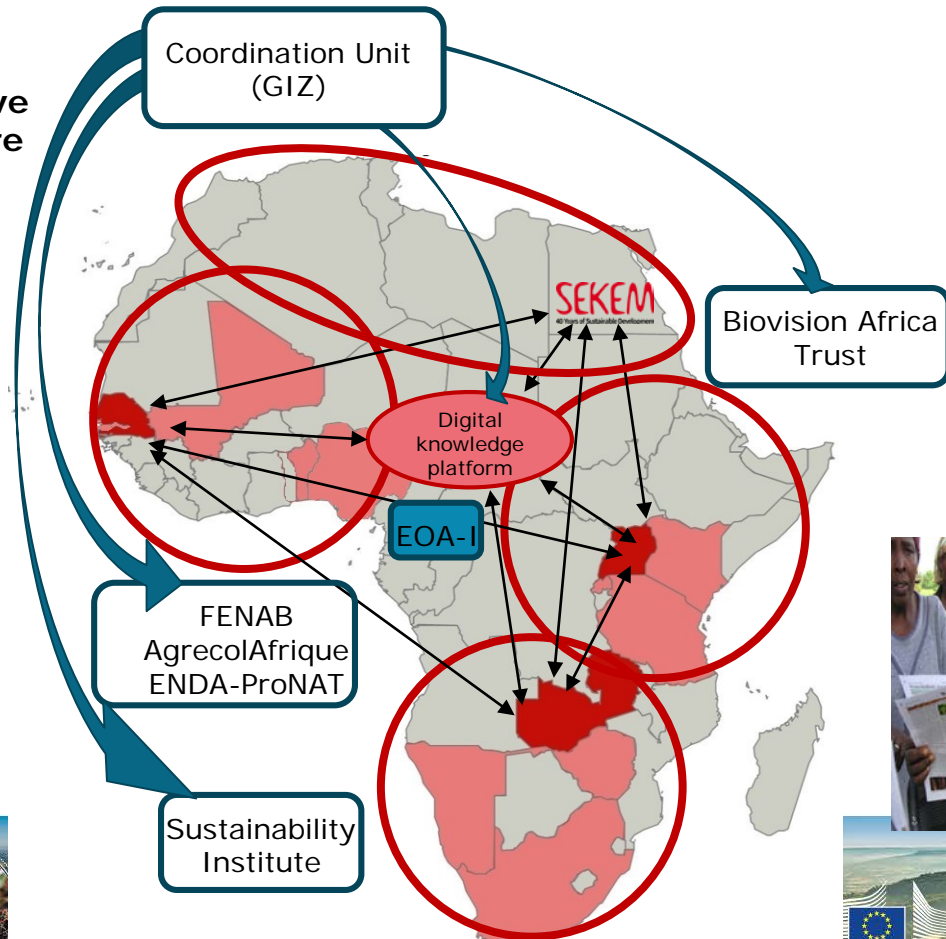
SOME KEY HIGHLIGHTS



Knowledge Center for Organic Agriculture in Africa (KCOA)

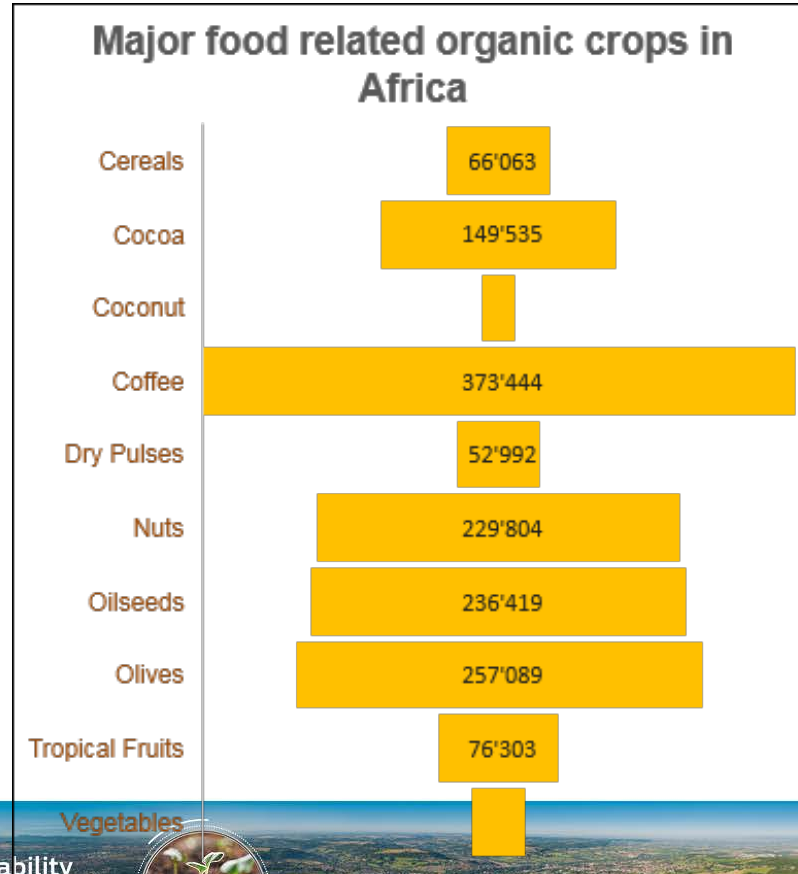
Main Objective: Knowledge hubs are successfully implemented as an innovative strategy for promoting organic agriculture with actors in the regions of West, East and Southern Africa

- Organizes network meetings „Boosting the Role and Potential of Organic Agriculture in Africa“.
- Cooperation and synergies with the AU EOA-I)
- Digital knowledge platform, continental level with region specific sections.
- Networking, leadership training on OA.
- Project Duration: 2019 – 2023.
- Supported by BMZ through GIZ



Role of Trade in Developing Organic Agriculture in Africa

- Mostly **export oriented** – Tropical fruits, vegetables, cereals, fish, nuts, and roasted coffee
- **Policy environment** - Few countries with national organic legislation (2-10) and national/regional standards (± 12)
- Some success stories (ex. East African Organic Standard, Tunisia, Uganda...)



Domestic Markets

Total organic market in Ethiopia, Kenya and Zimbabwe estimated at \$17.2 M in 2017 (15.9€) with $\pm 83\%$ of the sales in Ethiopia

Land use in ha. Source: FiBL & IFOAM



Domestic Markets – Cont'd

A growing Retail Sector:

- Supermarkets and modern stores.
- e-commerce platforms growing and expected to contribute \$50-75 billion in 10 yrs. e.g Kalimoni Green (Kenya); Epicerie verte (Morocco), Cooperative Sell-sellal (Senegal); Msongue family farm (Zanzibar)
- Famers' markets
- Home-grown start-ups streamlining value chains



Positive trends for the development of organic sales

Dynamism of PGS initiatives, efficient solution for the local/national market.

Rise of Africa's middle class >100 million people in Sub-Saharan Africa (excluding South Africa) with total spending power of +\$400 M per day... promising growth forecast.



Export Markets for Africa

Export figures: EU Market

9 African countries export more than 10'000 tons organic agri- food products to the EU.

Tunisia leads - in 2018 (estimated 4.1% share of total import value)

Key crops & Major African providers

Tropical fruits, nuts & spices: Ivory coast (12'686t) & Ghana (11'527t) supply 3.1% of total import volume

Coffee & Tea: Ethiopia (5'255t) & Uganda (4'926t) supply 8% of total import volume

Cocoa beans: Congo (9.864t), Sierra Leone (7'681), Uganda (5062t), Tanzania (3166t), Sao Tome & Madagascar supply 37.5% of total import volume

+ Morocco (5147t fruits) & Tunisia (30'000t olive oil)

Source: USDA/FAS

Export figures: USA

- **Extra Virgin Olive oil:**

Biggest recorded import, **Significant market share (34% average)**; Tunisia (96%), Morocco (4%)

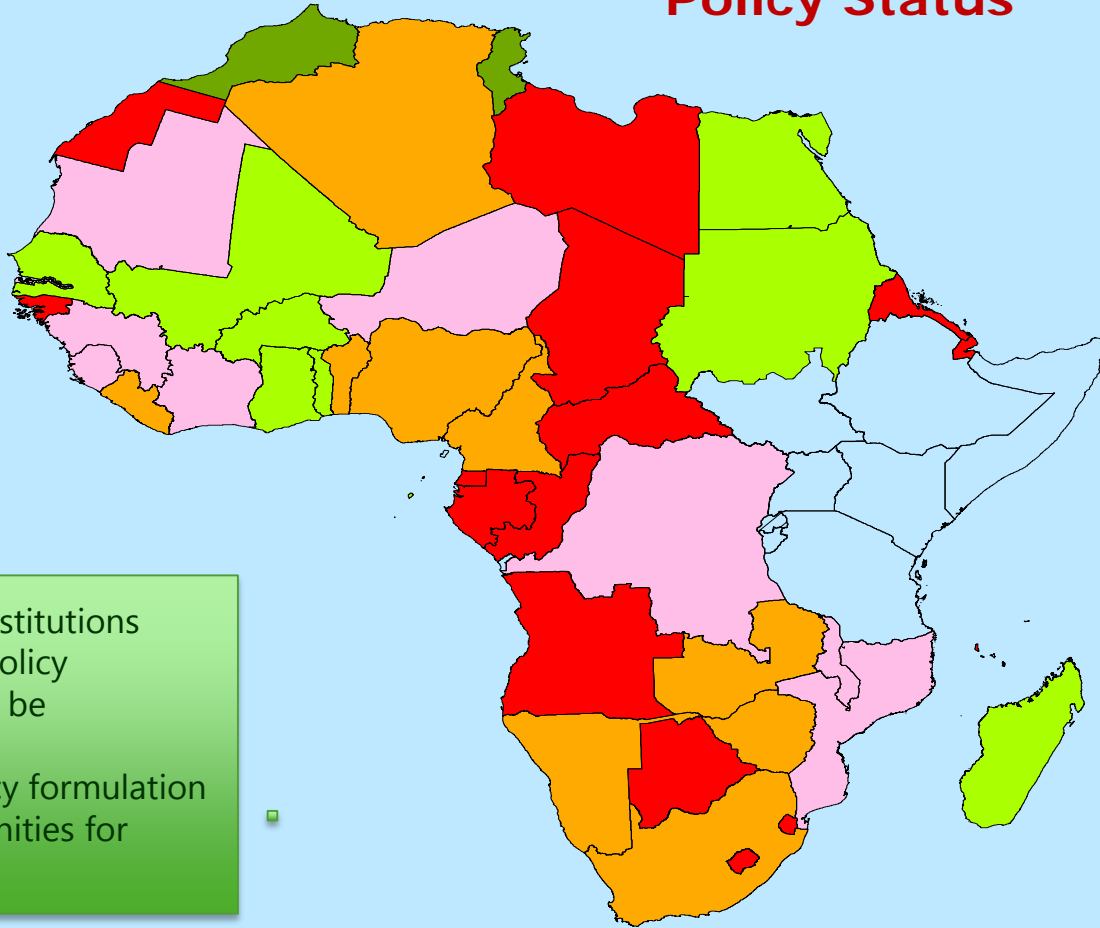
- **Arabica (non roasted): 10% average market share**; Ethiopia (80%), Uganda (7%), Rwanda (5%), Congo (3%), Kenya (3%), Tanzania (1%)

- **Other Coffee (not Arabica/non roasted):** Ethiopia (87%)

Source: UNCTAD



Policy Status



- Role of different institutions
- Mapping of EOA policy structures that can be strengthened
- Challenges in policy formulation
- Gaps and opportunities for change

Options to Stimulate Development of the Organic Sector

1. Organic farming has huge potential for excellent and lucrative export opportunity – investments needed.
2. Generating evidence-based research findings – to support dissemination, uptake, policy and planning.
3. Target multilevel & multistakeholder awareness creation and raising outside of the organic community; collect and disseminate strategic information: market trends and opportunities for African businesses, trade statistics (scale and multiplier effect).
4. Strengthen market system development and develop linkages: retail, trade promotion agencies, tourism, finance institutions, importers.
5. Strengthening and sustaining Advocacy to get political will and support.





We, the World Food Preservation Center (WFPC), Biovision Africa Trust (BvAT), IFOAM Organics International (IFOAM OI) and our local and international partners wish to thank you for participating in the 1st International Conference on Agroecology Transforming Agriculture & Food Systems in Africa on June 18 - 21, 2019 at Safari Park Hotel in Nairobi, Kenya.

We look forward to collaboration with you on the implementation of the 'Call to action'.



Momentum:

Biovision Africa Trust, jointly with World Food Preservation Center LLC and IFOAM Organics International organized the **1st International Conference on Agroecology Transforming Agriculture and Food Systems in Africa** with the theme: ***Reducing Synthetic Fertilizers and Pesticides by Scaling up Agroecology and Promoting Ecological Organic Trade.***

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THANK YOU !

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#AgriOutlook

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