

## Overview of The Kenya Organic Agriculture Sub Sector



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## The Organic Agriculture Sector

- OA advocates for management practices that use agronomic, biological and mechanical methods to promote and enhance agro-ecosystem health, including bio diversity, biological cycles and soil biological activity.
- World wide it is a multi billion Dollar industry, 2008 retail sales estimated at 40B USD and growing at a rate of 25% compared to conventional retail sales growth rate of less than 4%.
- About 31M Ha currently under certified organic management over 890,000 Ha in Africa; 174,199 Ha in Kenya.
- Demand for organic produce has not kept pace with Production with many products reporting under supply.

## The Kenya Organic Sector.

### Stakeholders' Analysis

- **Government:** Agriculture Sector Ministries; Kenya Bureau of Standards (KBS); Public research institutions - KARI; and Universities
- **Producers:** Small Scale Producers; Commercial Producers
- **Processors**
- **Traders**
- **Certifiers and Inspection agencies**
- **Civil Society Organizations:** KOAN, NGO's CBOs Training and research Institutions; Promoters ,
- **Development Partners**

## Categories of OA in Kenya

### 1. Formal Organic Agriculture.

- Certified
- Supply National and International Markets
- Commercial Farmers

### 2. Informal Organic Agriculture

- Non certified
- Organic production for Subsistence and national markets.
- Difficult to estimate the statistics

## Roles and Players

- **Research:** By National Agricultural Research Systems & International Research Institutions; KARI, ICIPE, Universities
- **Extension and Training:** NGO's; training institutes & universities (Moi Uni) offering certificate, diploma. Some universities are offering organic modules.
- **Organic Inputs:** Currently no commercial organic seeds.
- Soil fertility - mainly addressed on farm. However some commercial organic inputs are available in the market.

## Roles and Players cont'd

- **Processing and value addition:** Tea, coffee, macadamia nuts, essential oils, herbal teas, fruits and vegetables dairy products, herbal teas, honey cereals, jams, mushrooms, oils, dried fruits.
- **Organic Quality Assurance: National Markets** Encert is the active Third party CB. Others are through self claim based on trust; PGS,
- **International Markets:** Soil Association, Ceres, Bio Swiss, Ecocert and IMO, USDA – NOP and JAS

## Roles and Players Cont'd

- **National Marketing scope:** most initiatives are local, though there are regional ones (dried fruits from Uganda and coffee from Tanzania)
- **Market chains:** *direct to the consumers*; Box schemes; farmers markets;
- **Indirect Chains:** To Restaurants, organic specialized shops, retailers, green groceries traders/supermarkets

## Farmers Owned Market outlets and bulking centers



## Organic restaurants



## International Markets

- **Products:** Vary from herbs and herbal teas, coffee, macadamia, tea tree, avocado oil coconut to essential oils
- **Main markets** are Europe, US and Japan. Some exporters also sell to the local markets(Supermarkets)
- Some fresh produce exporters have reduced their production due to reduced orders

## Policy

- The ministry and stakeholders have developed the first draft of the organic policy which is the agenda of today!

## For More information visit/contact us on:

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- Thank you ALL