National Organic Agriculture Development Programme for Tanzania 2009-2015

Mpango wa Kuendeleza Kilimo Hai Tanzania (MKUKIHATA)

By National Organic Agriculture Forum-NOAF

Cover note

On the following pages there is the third draft of a National Organic Agriculture Development Programme for Tanzania. It has been developed during two workshops in Dar es Salaam 14-15 April and 10-11 July 2008, as well as two rounds of written consultations. In addition it was discussed briefly at training for government officials in Dar es Salaam 9 July.

At the first workshop the participants made an SWOT analysis (a summary of which is part of this document) of the sector and it reviewed the:

1) The recommendations of the International Conference on Organic Agriculture and Food Security (FAO, Rome, 3 - 5 May, 2007).
2) The recommendations for policy emanating from the Policy workshop following East African Organic Conference held at Dar es Salaam on the 28th May - 1st June, 2007 and the CBTF-IFOAM Organic Policy Workshop Nairobi 11 Dec 2006.
3) the Integrated Assessment of the organic sector in Tanzania and the Best Practices for organic policy making (both from the UNEP UNCTAD CBTF project) and Building Organic Sectors (IFOAM 2007).

Based on those, main objective, targets and activities were developed and thereafter further refined by a consultant, Gunnar Rundgren from Grolink. This resulted in the 1st draft which was circulated to stakeholders in May for their comments[1]. The comments were reviewed and the draft amended and the version 2 was circulated 3 June 2008.

In the second workshop the details of the version 2 were discussed in depth for two days, and the result is this third version. A main change was that the time plan for the programme was changed to 2015 instead of 2013 and that the area target could be ten percent instead of five.

The MKUKIHATA fits into the policy framework of MKUKUTA and the Agriculture Sector Development Programme. It will form the basis of a position paper to be submitted to the Agriculture Review Forum in mid September. It is recommended for adoption by the cabinet and thereafter being implemented through the relevant ministries and through the District Agriculture Development Plans. It will also be used to guide private sector and civil society as well as in contacts with development partners.

The work is initiated by the National Organic Agriculture Forum, a cooperative platform between the private sector and the government of Tanzania, and has been supported by the Sida funded Export Promotion of Organic Products from Africa programme.

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[1] Comments were received from TOAM, the NOAF task force, Petra Bakwell- Stone (Afrikabisa Organics), Noel Yatera (MCE Ltd), Alex Danissen (Shicanet), Erwin Kinsey (Global Service Corps), Joelle Kato-Andrighetti (IFOAM), Andrew Ward (Research Into Use), Joyce Kessy, Joachim Weber (Tanzania Organics), Fred Machange (TOFO) and Sophia Twarog (UNCTAD), Alastair Taylor (AgroEco Uganda)

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Executive Summary

The Mpango wa Kuendeleza Kilimo Hai Tanzania (MKUKIHATA) - National Organic Agriculture Development Programme for Tanzania[2] 2009-2015 is a comprehensive programme for the development of the organic sector. It is aligned with MKUKUTA and the Agriculture Sector Development Programme and has a strong focus on food security and poverty alleviation through income generation and a market-led expansion of the organic agriculture sector.

The main reasons for Tanzania to invest in the further development of the organic sector are:

4) To contribute to poverty reduction and food security
5) To increase the competitiveness of Tanzanian farmers both in the domestic and export markets and thereby support incomes of rural communities
6) To improve the image of Tanzanian products in the market place
7) To protect health of consumers, farmers and farm workers
8) To protect the environment and safeguard biodiversity

The programme contains a vision and a mission for the organic sector and four strategic and ambitious targets.

1) Ten percent of the arable area of Tanzania is organically managed by 2015.
2) 50% of the actors in the farm sectors have a basic understanding of what organic agriculture means and how it is practiced by 2015.
3) Productivity in organic farming has increased by thirty percent by 2013.
4) The value of the organic market has reached 25 billion TSH by 2013.

The main strategies to reach there are

5) Market-driven expansion of the sector targeting domestic, regional and international markets
6) Development and promotion of the contributions of organic agriculture to the environment.
7) Increasing awareness and capacity on all levels from production to consumption, including institutions, support organisations and research
8) Relevant government policies are supporting the development of the sector
9) Strengthening coordination and communication among all actors in the sector
10) Mobilising the needed financial and technical resources

The MKUKIHATA formulates a number of objectives for the areas of Policy, Standards and Conformity Assessment, Markets and Production, as well as targets and broad activities to accomplish the objectives. It describes the implementation process and underlines the need to collect necessary data in order to monitor progress.

The MKUKIHATA states the importance of official recognition of organic. The MKUKIHATA recommends that some districts/areas are selected as pilot areas for organic farming. The purpose is to ensure that in some areas there are concerted efforts by all stakeholders and the local governments to do as much as possible. It further promotes continued regional cooperation.

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[2] All through the document, Tanzania is used in the sense of the United Republic of Tanzania.

Regarding standards it recommends further development of the East African Organic Product Standard; improved access to certification and increase capacity of operators to cope with certification requirements. A balanced development of export and domestic market is recommended. Market actors, in particular farmer organisations need supporting services and increased capacity. The focus for production is to increase productivity on organic farms and to develop extension and research to correspond to farmers' needs. The MKUKIHATA further points to the need to improve availability of needed inputs, seeds as well as fertilisers and biological pest control agents. Finally it states that the expansion of organic should also include livestock, aquaculture, wild product and honey.

The MKUKIHATA is developed through a consultative public-private process with participation from main stakeholders and relevant government authorities. Also for its implementation this partnership needs to be maintained. Central government needs to set the necessary framework and local governments need to include parts of the programme in the District Agriculture Development Plans. Private sector actors should implement many activities. Resources for implementation should be drawn from public and private sector, as well as from development partners and possible new funding sources, such as international schemes for payment of ecosystems services.

As the programme stretch over seven years and the sector is still in its infancy the programme is likely to need a mid-term review.

Acronyms

ASDP	Agriculture Sector Development Programme
ASLM	Agricultural Sector Lead Ministries
CBO	Community Based Organisation
CSO	Civil Society Organisation
DADP	District Agriculture Development Programme
EAC	East African Community
EAOM	East African Organic Mark
EAOPS	East African Organic Products Standard
EPOPA	Export Promotion of Organic Products from Africa
FBO	Faith Based Organisation
HDRA	The Henry Doubleday Research Association
ICS	Internal Control System
ITC	International Trade Centre
IFOAM	International Federation of Organic Agriculture Movements
KIHATA	Kilimo Hai Tanzania (Organic Agriculture in Tanzania)
KCU	Kagera Cooperative Union
KNCU	Kilimanjaro Native Cooperative Union
MKUKIHATA	National Organic Agriculture Development Programme
NGO	Non Governmental Organisation
NOAF	National Organic Agriculture Forum
MAFC	Ministry of Agriculture, Food Security and Cooperatives
MDG	Millennium Development goals
MKUKUTA	Mkakati wa Kukuza Uchumi na Kupunguza Umaskini Tanzania
OAD	Organic Agriculture Development (a training program by Grolink AB)
OSEA	Organic Standards in East Africa
OSDT	Organic Sector Development Training
PELUM	Participatory Ecological Land Use Management
PGS	Participatory Guarantee Systems
Sida	Swedish International Development Cooperation Agency
TBS	Tanzania Bureau of Standards
TFDA	Tanzania Food and Drugs Agency
TOAM	Tanzania Organic Agriculture Movement
TOFO	Tanzania Organic Foundation
TOT	Training of Trainers
TPRI	Tropical Pesticides Research Institute
Tsh	Tanzania Shilling
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Program
UNEP UNCTAD CBTF	UNEP UNCTAD Capacity Building Task Force on Trade, Environment and Development
USADF	US African Development Fund

Acknowledgements

This National Development Organic Agriculture Development Programme has been developed through the initiative of the National Organic Agriculture Forum, by the stakeholders in Tanzania, coordinated by TOAM. The work has been supported by Sida through the EPOPA programme.

1 Introduction

A wide range of stakeholders, including representatives of the government, has developed the National Organic Agriculture Development Programme for Tanzania (MKUKIHATA). It is a result of a long process to strengthen the sector in steps from:

- scattered NGO initiatives;
- emerging business;
- establishment of key institutions (TanCert & TOAM);

to the current stage where organic is increasingly recognized as being a relevant development option for agriculture in Tanzania. Development partners such as Hivos, EPOPA, the UNEP UNCTAD CBTF and IFOAM have supported this process

The MKUKIHATA will be submitted to the relevant ministries, for mainstreaming into their plans and budgets and implemented in District Agriculture Development Plans. It will also be used to guide private sector and civil society as well as in contacts with development partners.
The work is initiated by the National Organic Agriculture Forum (NOAF), a private-public sector platform uniting all those committed to promoting the development of the organic agriculture sector in Tanzania, see more in Annex 1.

After this Introduction, the MKUKIHATA has a section which gives background information. This is written to make the reader aware of the current status of the organic sector of Tanzania and the basic facts about organic agriculture. It also gives the rationale for why Tanzania should support organic farming and how it relates to main policies. After the background follows the Development Programme proper. Finally a short chapter on implementation is ending the MKUKIHATA.

2 Background

Rationale for the National Organic Agriculture Development Programme

The main reasons for Tanzania to invest in the further development of the organic sector are:

- To contribute to poverty reduction and food security
- To increase the competitiveness of Tanzanian farmers both in the domestic and export markets and thereby support incomes of rural communities
- To improve the image of Tanzanian products in the market place
- To protect health of consumers, farmers and farm workers
- To protect the environment and safeguard biodiversity

Organic Agriculture

Organic agriculture includes agricultural systems that promote the environmentally, socially and economically sound production of food, feed and fibres, and increasingly the production of fuel and feedstocks for industrial and speciality products such as pharmaceuticals. By respecting the natural capacity of plants, animals and local conditions it aims to optimize quality in all aspects of agriculture and the environment. By refraining from use of synthetic fertilizers, pesticides and pharmaceuticals, organic agriculture dramatically reduces the need for external inputs to agriculture. Crop rotations, intercropping, well-adapted varieties, biological pest control, and nutrient recycling ensure a reasonable production level and healthy crops.

- Over the last 25 years, the consumption and production of organic products has been growing and this is continuing. The world acreage of certified organic agriculture is estimated to be 31 million hectares (Willer 2008). There are probably another 10-20 million hectares of non-certified organic agriculture, mainly in developing countries. In addition, organic markets are also outlets for products from wild collection; some 77 to 103 million hectares are certified for organic wild collection (ITC 2007).

2.1.1 The global organic market

The organic market has grown from US$ 13 billion in 1998 to US$ 33 billion in 2005 (Willer 2008). Over the past two decades, growth rates of global markets for organic agricultural products have been much higher (usually 2-4 times higher) than those of conventional agricultural products. Moreover, organic products fetch premium prices. Countries like Denmark, Austria, Switzerland and Sweden have organic market share in the range of 4-6 %. Market shares in the bigger countries, Germany, UK, France and Italy are in the range of 2-4% (Willer 2008). The last decade has seen the emergence and rapid growth of certified organic food and beverage exports from Africa.

2.1.2 Relevance of Organic agriculture for Tanzania

- In some developing countries there are large numbers of farmers that practice either traditional agriculture which does not rely on purchased inputs, or farmers that just cannot afford to buy inputs, e.g. in Tanzania the average use of chemical fertilizers is less than 2 kg per hectare and year (FAO 2007): meaning that most land is **never** chemically fertilized.

Practical experiences as well as a number of reports demonstrate the appropriateness of organic agriculture for small-scale farmers in developing countries. This includes reports by the FAO (FAO 2007b); IFAD (Damiani 2002 and Giovannucci 2005) and UNCTAD (Twarog 2006) as well as an evaluation of the EPOPA programme (Forss 2005). Organic production has the potential to produce sufficient food of a high quality. It contributes to poverty alleviation and food security by a combination of many features, most notably by:

- Increasing yields in low-input areas
- Conserving biodiversity and nature resources on the farm and in the surrounding area.
- Increasing income and/or reducing costs
- Producing safe and varied food
- Being sustainable in the long term.

Organic agriculture is relevant and has significant potential to sustain livelihoods both as a certified production aiming at a separate marketing, as well as non-certified production for consumption by the farmers themselves and the local communities (Bakewell-Stone *et al.*, 2008). An in-between is organic production 'certified' through a so-called Participatory Guarantee System which is ideal for marketing smallholder produce for example to nearby towns.

Organic agriculture in East Africa[3]

In East Africa the development of the sector has been very much a private sector driven activity, by commercial exporters (particularly in Uganda) and NGOs (especially in Kenya).

2.1.3 Production

The numbers of certified producers and farmland under organic agriculture is increasing (data from 2007, Rundgren 2008, Bakewell-Stone, 2006):

Estimates of the certified land area in Tanzania indicate that over 80,000 hectares are under certified organic production, with at least 36 companies and 65,000 farmers involved in producing organically in the country. In addition there are thought to be more than 200,000 ha of uncertified organic agricultural land. This compares to other countries in East Africa:

Kenya: Farmers 35,000; Farms 181,500 ha; Companies 18
Uganda: Farmers 60,000; Farms 250,000 ha; Companies 34
Rwanda: some 5 companies
More operators are investing in organic agriculture and the products lines are expanded.

[3] This section is based on Rundgren 2008

2.1.4 Training and extension

NGOs and export companies has to a large extent provided extension work to organic producers. The public extension service has not really been involved in organic. In Tanzania, KIHATA have been providing training in organic agriculture to farmers since mid-seventies and Peramiho Organic Garden was established in Ruvuma region in 1898 and runs a variety of courses, particularly on the use of sunhemp (*marajea*). Since 1998 EPOPA has been active providing training to farmers and companies in several export projects, followed by TOAM being active in extension and training since 2005. Apart from these activities NGO's and church organisations have been working with farmers in organic agriculture.

In Tanzania and Kenya there are a large number of NGOs providing training in organic agriculture, some of them, e.g. the Kenya Institute for Organic Farming (KIOF) have existed for twenty years already. Tanzanian farmers have also been trained at KIOF. There are also a number of NGO engaged in training in Uganda and Tanzania as well. Lately, universities have showed some interest:

- Sokoine University of Agriculture in Tanzania offers undergraduate course in organic agriculture which has been accepted into the revised curriculum for use in 5 degree programmes
- International Training Course on Organic Agriculture at Makerere University (in cooperation with CIAT and BOKU, Uganda
- Uganda Martyrs University has organic agriculture degree course

The Organic Sector Development Training has been offered by EPOPA in both Uganda and Tanzania for five years, this course is now gradually taken over by Martyrs University and TOAM respectively.

2.1.5 Research

There has been a great deal of research into organic practices in the region, although it is fairly scattered and has not yet been systematically compiled. Several post-graduate studies have been done on organic agriculture with Sokoine Unversity of Agriculture (SUA), for example into Minjingu rock phosphate as an organic fertiliser and the University of Dar es Salaam. SUA has just embarked on a 20-year trial together with FIBL (Switzerland). In addition, Agricultural Development Projects have been testing biopesticides in collaboration with the Tropical Pesticides Research Institute (TPRI). Ukiriguru (Agricultural Research Institute in Mwanza) has done supportive research on cotton pest and diseases for the Biore organic cotton project (Meatu). Similarly Uyole Agricultural Research Institute in Mbeya has been engaged in testing the insecticidal properties of Tephrosia vogelii (*utupa*) for use in organic systems. In Zanzibar the Plant Protection Unit has been engaged in biological control of cassava diseases and organic fertilisers.

ICIPE in Kenya does applied research for pest control, most of it based on organic agricultural principles. CABI-ARC has also worked on the development of biological pest control.

2.1.6 Policy

For many years, East African Governments paid little attention with a few exceptions, e.g. the Uganda Export Promotion Board has identified organic products as strategic

products and the Uganda Coffee Development Authority has set a target that 10 percent of the Ugandan coffee should be organic. However, in recent years, Governments have become more aware of the benefits organic agriculture can offer and some policy developments have taken place:
Uganda has opted for a specific policy for organic agriculture. The draft is at advanced stage.
Kenya chose to mainstream organic agriculture in its Nutrition/Agriculture Policy. Later it will be included in other relevant policies or possibly a specific organic policy will be developed. Rwanda is also embarking on the development of organic (see below for Tanzania).

2.1.7 Market

Most organic products from EA are aiming at the export market. Notably, most exporting companies are contracting out-growers for production of export products. However, there are also a few cooperatives exporting (e.g. KCU and KNCU in Tanzania) as well as a few plantations (tea plantations in Tanzania and Kenya). Products for the export market include: Bark cloth; Cashew nuts; Cocoa; Coffee beans; Dried fruits; Essential oils; Fish (sustainable wild fish); Fresh fruits (bananas, pineapple, passion fruit); Herbal teas; Herbs; Honey; Instant coffee; Juices; Peanuts; Sesame; Shea nuts; Spices; Vanilla and Vegetables (green beans etc.)
The main market is the EU, but exports also take place to the US as well as to closer markets in the Persian Gulf and South Africa. A few products, such as canned pineapples, are processed.

The East African market for organic products is relatively small but fast-growing at least partly fuelled by consumers concern on food safety/health. Although uncertified, organic products sell for more in many local markets, such as in Kilimanjaro. Local, free-range chickens and eggs are also in high demand and can get four times the price of industrial chicken eggs. Some supermarkets and green groceries are stocking organic products. There are a few dedicated organic shops, but also direct marketing schemes (box schemes and farmer markets), sales to restaurants, hotels, wholesalers and retailers. Most of the initiatives to develop local/national markets are either NGO-supported grower groups, private companies and businesses, cooperatives or organised producer groups. Sales are mainly fresh produce; processed products vary from honey, teas, jams, milk products, dried fruits, mushrooms and oils. Self claim is the normal form for assurance about the organic quality, but Participatory Guarantee Systems and third-party certification also exist

2.1.8 Certification

There are two organic certification bodies in Kenya, AfriCert and EnCert. EnCert has a clear focus on certification for the domestic market, while AfriCert is ISO 65 accredited for EurepGap (now GlobalGAP). UgoCert is based in Uganda and TanCert in Tanzania. Both have just received accreditation to ISO 65 and the IFOAM Norms. TanCert has agreements with IMO, Ceres and Bio inspecta and UgoCert with IMO and Ceres, which facilitate market access. Otherwise, certification for export market in East Africa is offered by European-based certification bodies such as IMO, Ceres, EcoCert, BCS, Control Union, Soil Association and bio.inspecta.

Apart from third-party certification, the National Organic Agriculture Movements, often in cooperation with NGOs, are implementing guarantee schemes for smallholder along the lines of Participatory Guarantee Systems (PGS).

2.1.9 The East African Organic Products Standard

Local organic certification bodies were established in Tanzania and Uganda in 2003, with support from the Sida-financed EPOPA program (www.epopa.info). In Kenya two local bodies offer organic certification. The local certification bodies in Tanzania and Uganda developed local organic standards, and the Kenya Organic Agriculture Movement (KOAN) did the same in Kenya. In 2005, the Bureaus of standards in Tanzania and Kenya showed interest in this and started to develop own public standards for organic, in the case of Kenya they were completed and gazetted in 2006.

Already at a regional meeting in Arusha 2003, the stakeholders agreed that a regional standard would be valuable. However it was not until end of 2005 that funds were made available from the EU and Sida and the process could start. Supported by IFOAM, UNEP and UNCTAD the stakeholders developed a regional standard in the period December 2005 to January 2007. In April 2007 the council of the EAC approved the East African Organic Products Standard - EAS 456:2007.

The three national organic agriculture movements in Tanzania, Kenya and Uganda further developed the East African Organic Mark (EAOM) – also referred to as the Kilimohai mark. That mark is owned by the three movements and is made available to all producers (for a very low nominal fee) that are either certified by any local or foreign certification bodies or that are part of a recognised PGS system.

Organic Agriculture in Tanzania

2.1.10 Early development (up to 2002)

Formalised efforts to promote organic agriculture date at least to the late 19th century, when missionaries promoted organic crop and livestock production. A good example is the Peramiho Fathers who introduced and promoted sunhemp as alternative soil fertilization, mixed farming (*Kilimo mseto*) where animals are kept and manure used for the farm, tree are planted for soil fertilization and other sustainable practices from indigenous and modern science were encouraged. Books and publications have printed and disseminated since then.

When NGOs were allowed to operate in the country, most of the agricultural NGOs trained farmers in sustainable agriculture practices, and also started to document the wealth of indigenous knowledge on sustainable agriculture. These include PELUM Tanzania, INADES Formation Tanzania, Agricultural Development Programme (ADP) Mbozi, the Uluguru Mountains Agricultural Development Project (UMADEP), Evirocare and CHEMA, to name a few.

Kilimo Hai Tanzania – KIHATA was established in 1995 as a national association to promote and develop organic agriculture in Tanzania. Membership is spread in nearly all regions of Tanzania mainland and Zanzibar.

Private companies were interested in trading organic products as the market for organically produced products was developing. Companies such as ZanzGerm, Biore, and Biolands organized farmers for organic productions of spices in Tanga and Zanzibar, cotton in Meatu, cocoa in Kyela. Other companies had started their own organic farms; e.g. Kimango farm in Morogoro and Luponde Tea in Njombe. The increase of companies interest in export of organic products was supported from 1998 onwards by the Sida financed Export Promotion of Organic Products from Africa – EPOPA.

The Board of External Trade (BET) in collaboration with International Trade Centre (ITC) conducted a study on organic market opportunities. It identified constraints facing Tanzania exporters in exploiting the market opportunities. Among the constraints was cost of certification as certifiers and inspectors for organic production system and standards were from foreign countries.

2.1.11 Developments 2002 to 2008

In this period 23 operators have started exporting organic products mainly to EU countries and the USA, with market linkage support from EPOPA. This programme also facilitated and supported financially and technically the establishment of a national organic certification body by the name TanCert. It has established partnership with accredited foreign certifiers for serving Tanzanian organic exporting companies. Currently TanCert provide inspection to 36 (are there other operators) organic operators in the country.

As organic agriculture was expanding in terms of production, trade and support, stakeholders deliberated to establish an umbrella organization for coordination and facilitation of organic agriculture initiatives. This organization is registered as Tanzania Organic Agriculture Movement - TOAM, under the NGO Act, 2002. Since 2005 EPOPA and Hivos have financed the establishment and operations of TOAM. There are 55 institutional members from private companies, NGOs, cooperatives and associations of producers and 10 individual members.

Both EPOPA and TOAM have been working towards developing domestic markets and facilitating export markets. Currently organic products are exhibited in trade fairs like Sabasaba in Dar es Salaam and Biofach in Germany. In 2008, 14 export companies were able to exhibit organic products in the Biofach where they made business deals with importing companies in Europe and America.

The EPOPA and HIVOS training programmes have developed the capacity of stakeholders from both public extension and training and private sector in providing advisory services to farmers, consumers, policy makers and traders in terms of market requirements and opportunities, production practices, quality management, policy and general awareness on benefits.

Input stockists have started stocking organic inputs such as fertilizers (Minjingu rock phosphate, compost) and pesticides, e.g. neem and pyrethrum. The prices may limit smallholder farmer from access to inputs but organic agriculture encourages producers to use available materials and practices in maintaining and increasing soil fertility and use of medicinal plants for pest and disease control.

2.1.12 Current status

There are around 80,000 farmers in organic production, with approximately 65,000 hectares under organic production. Most farmers are in groups who are either farmer groups or cooperatives or farmers contracted by exporters. In total there are 36 certified operators (i.e. companies or organizations that have a certificate). An overview of organic operators is found in the table below.

Organic Operators and Products in Tanzania 2008		
Crop/Product	**Location**	**Operator**
Spices & Vanilla	Tanga, Zanzibar, Morogoro, Kagera	GFP, TAZOP, Mayawa, Maruku
Coffee	Mbeya, Mara, Kagera, Kilimanjaro	Lima, Mara coffee, KCU, KNCU, TANICA
Cocoa	Mbeya, Morogoro	BIOLAND, HAI LTD, BIOTA*, FIDAHUSSEIN CO*.
Cotton	Shinyanga, Singida	Biosustain, Biore, BOFA
Sesame	Singida, Rufiji, Morogoro	Biosustain, Fida Hussein, Lumumba Farm*
Cashew nut	Coastal, Mtwara,	PCI, OLAM, Dutch Connection*
Fresh and Dried Fruits	Iringa (Njombe), Kagera, Morogoro	Dabaga, Matunda mema, Mikese Farm, UMADEP*
Peanuts	Rukwa	Fair Share
Tea & herbal	Iringa (Njombe), Morogoro	Luponde, Kimango Farm
Leather	Arusha	Asilia co*.
Mushroom	Dodoma	Agroproducts Ltd*
Inputs		
Neem for Pest	Arusha	Osho
Compost(fertilizer)	Zanzibar	Zarec
Rock Phosphate	Arusha	Minjingu Co
Pyrethrum	Dar es Salaam	Mansoor Daya

*** In conversion**

2.1.13 Stakeholders

Key stakeholders:	Role
Farmers/producers	Production
Traders/exporters	marketing and sales/exports, private extension, market promotion
Government (relevant ministries and related institutions)	training, research, extension, policy, market facilitation, information management
Processors	Value addition, product development
CSOs (NGOs, FBOs, CBOs)	Training, advocacy, coordination,

	information sharing, extension, market linkage
Certifiers (TanCert and foreign bodies, TBS, TFDA)	Inspection & certification, Quality assurance, standards
Service providers (extensionists, consultants)	Farmer training and advisory services
Training & research institutes	Research on relevant topics (inputs, pests & diseases, soil fertility, etc.), training
Stockists	input supply
Development Partners	Support capacity building
Consumers	Create markets and quality specification
Manufacturers	Packaging materials, agricultural inputs
Transporters	Transportation, distribution
Media	Publicity and awareness creation

2.1.14 SWOT analysis of the sector

Below there is a summarised analysis of the Strengths, Weaknesses, Opportunities and Threats (SWOT analysis) for the organic sector (TOAM 2008)

Strengths	**Weaknesses**
TZ has a wide range of organic products (food & fibre) for the export market. Private sector actively engaged in organic agriculture and has capacity. National organic movement. Existence of accredited national certification body (TanCert) East African Organic Mark. East African Organic Products Standards. Organic agriculture know-how exist Indigenous knowledge exists.	Inadequate awareness about organics amongst consumers Limited organized organic supplies for the domestic market. Limited market information about prices, market trends (domestic & export). Most organic initiatives are dependent on external funding (e.g. EPOPA). Inadequate knowledge about organic farming techniques amongst farmers. Limited organic knowledge in public extension service. Very little formal training & research available on organic agriculture.
Opportunities Growing (export & domestic) market for organic products. There is not much use of pesticides, fertilizers; many farmers are "organic by default (easy to convert). Government is involved in promoting environmental and soil conservation practices, so introducing OA is in line with government policies.	**Threats** State Extension system promotes conventional farming. Distribution of / subsidized fertilizers & chemicals. Other programmes that can undermine organic (e.g. use of DDT , GMO Competition with other sectors for government funds. Competition from other countries.

Benefiting from funds for CO2 sequestration programmes or other ecosystem services.	Trends in export markets, such as food miles discouraging exports.

This analysis is helpful when designing the development programme.

How can Organic Agriculture be used to achieve public goals

2.1.15 MKUKUTA and MKUZA

The National Strategy for Growth and Reduction of Poverty (MKUKUTA, 2005-2010 in the Mainland & MKUZA in Island) is a medium term framework for implementing vision 2025. The strategy is output oriented providing more emphasis on the development of economic productive sectors and the private sector, in particular the agriculture and SME sectors, in order to accelerate economic growth (GDP growth target of 6-8% per annum). NGRP is organized around the three clusters:

Cluster 1: Growth and poverty-reduction
Cluster 2: Improved quality of life and social well-being and
Cluster 3: Governance and accountability

While NOADP targets specifically the first cluster – achieving poverty-reduction through equitable, sustainable growth – the other two clusters also have a bearing on the effectiveness of organic standards and trade.

The Agriculture Sector Development Programme:

In response to economic challenges including stagnant growth in the agriculture sector, the Government of Tanzania has developed and approved the Agriculture Sector Development Strategy in 2001. The objective of ASDS is to achieve a sustainable agricultural growth rate of 5% per annum, primarily through the transformation from subsistence to commercial agriculture.
The Agriculture Sector Development Programme (ASDP) is the Government's operational response to the ASDS and the main mechanism for its implementation is the District Agriculture Development Plans (DADPs).

ASDP Contribution to NSGRP Targets and how organic agriculture fit in

Ref to MKUKUTA	**NSGRP Targets**
4.1	Reduced proportion of rural population below the basic needs poverty line from 38.6 percent in 2000/01 to 24 percent in 2010
4.2	Reduced proportion of rural food poor (men &women) from27% in 200/01 to 14% by 2010.
2.4	Increased agriculture growth from 5% in 2002/3 to 10% by 2010

2.5	Increased growth rate for livestock sub – sector from 2.7% in 2000/01 to 9% by 2010
	NSGRP Cluster Strategies **Marketing and Private Sector Development**
1.1.3	Encourage public – private to invest in business Training export and domestic marketing. Also, training in quality assurance and establish modern quality testing centres and laboratories. ***Organic farming system has embraced quality management system and traceability requirements. Adoption of organic farming will comply with EU requirements, Japanese Agricultural Standards (JAS), USDA-NOP standards and East African Organic Product Standards – EAS 456:2007.***
4.5.1	Identify new markets, promote products that maximize value addition and tap new opportunities for supply chain. ***Market for Organic products are ever increasing at a rate of 15- 20 percent per year. Its demand by importers from EU, USA and Asia/Middle East is in increase. The world (BioFach) and continental organic exhibitions (about 5 exhibitions per year) are opportunities for establishing business contacts and product promotion.***
3.1.2	Research, identify and promote food storage technologies/facilities and enhance agro-processing as well as environmentally friendly farming technologies and practices especially for rural areas. ***Organic farming embraces and reinforces environmentally friendly farming through its practices, technologies and standards.***

Millennium Development Goals

Organic agriculture and the Millennium Development Goals
Organic Agriculture alone can not fulfil the MDGs, but it can contribute to most of them, in particular to the goals one and seven.

MDG 1. Eradicate extreme poverty and hunger
In the overwhelming majority of cases organic agriculture led to more surpluses in the production, and thereby reduced poverty. This is accomplished by higher prices for the products or by lower costs of production (as no chemical inputs are bought) or a combination of them.

MDG 3. Promote gender equality and empower women
The diverse production in organic can give women more responsibility and power. The open dialogue and new thinking that organic implies paves the way also for other social changes in the farming communities. The participation of women in leading positions in the organic sector is striking.

MDG 7. Ensure environmental sustainability
Organic agriculture delivers on many accounts, such as eco systems services (soil formation, climate regulation etc.), protection of bio-diversity, erosion control etc. It promotes a smaller, more diverse scale, contributing to landscape stability.

Organic in government policies

In the Tanzanian Livestock policy of 2006, organic livestock farming policy statements are mentioned on page 56 as quotes.

i. In collaboration with other stakeholders the Government will promote and create awareness on organic livestock farming
ii. The Government in collaboration with other stakeholders will encourage and promote investment in organic livestock farming
iii. The Government will strengthen technical support services in organic farming practices.

At present the National Agricultural policy is under review and the draft consists of policy statements that support Organic Agriculture (section 4.8)

i. The Government will facilitate registration and availability of natural /organic inputs to farmers such as pesticides.
ii. The Government will facilitate the accreditation of organic products and also support institutions in building their capacity to deliver required services in order to reduce certification costs.
iii. The Government will support initiatives for regulating certification.

There are already development partners that support the organic sector. First involved was Hivos that has supported NGOs that promote organic farming, in particular Envirocare and later also TOAM. Sida has, through the EPOPA programme, provided the largest investment in the sector starting already 1998 and phasing out 2008, investing more than 6 million Euro over this period. That programme has had export marketing as its focus and has engaged 16 companies and more than 40 000 small holders in export marketing. The programme has also supported the establishment of TOAM and TanCert and has provided extensive direct support and technical assistance to TanCert. Further, the last five years EPOPA has conducted a lot of trainings for the sector.

Other development partners that have supported and are supporting the organic sector. Examples include: GTZ, ITC, Cordaid, UNCTAD, ADF, IFOAM, Action-aid, that have supported NGOs that promote organic farming, private/business companies, TanCert and producer associations.

IFOAM, UNEP and UNCTAD, through the OSEA (funded by Sida) and CBTF (funded by the EU and Sida) projects have supported regional cooperation, a number of studies and an integrated assessment of the sector in Tanzania (coordinated by Envirocare). In particular the two projects supported the development of the EAOPS and the EAOM as well as the emerging organic policy developments in the EAC member states. Both the OSEA and CBTF projects are planned to continue.

ITC made a number of market surveys in the early 2000s and has since supported a number of exporters e.g. for trade fair participation. Other actors, such as the USADF, GTZ, IFOAM, Misereor, Coopibo/Veco TZ and Cordaid have initiated support to the organic sector.

International NGOs, such as Caritas and Action Aid have recently explicitly included organic agriculture in their programmes. However many of them have promoted de facto organic practices for a long time already. The Henry Doubleday Research Association (which trades under the name Garden Organic) based in the UK is also supporting the development of organic farming in Tanzania, e.g. through the development of a Swahili language educational materials for farmer field schools.

Organic farming has still not reached basket-funded programmes or other multilateral programmes.

3 The National Organic Agriculture Development Programme for Tanzania 2009-2015

The MKUKIHATA has a vision, a mission, strategic targets and main strategies. Based on those more detailed objectives, targets and activities are developed.

Vision

A vibrant organic sector contributing to improved livelihoods and environmental and economic sustainability.

Mission

To promote and support a sustainable organic agricultural sector that provides quality goods and services to domestic, regional and international markets to enhance food security, care for the environment, health and social fairness through extension, marketing, research, training, awareness-raising, advocacy, networking and coordination.

Strategic targets

The following four overall strategic targets are adopted as being central for the accomplishment of the mission and its goal - a sustainable organic agricultural sector that provides quality goods and services to domestic, regional and international markets:

1) Ten percent of the arable area of Tanzania is organically managed[4] by 2015.
2) 50% of the actors in the farm sectors have a basic understanding of what organic agriculture means and how it is practiced.
3) Productivity in organic farming has increased by thirty percent by 2015.
4) The value of the organic market has reached 25 billion Tsh[5] by 2015.

Main strategies

To reach the targets the following main strategies are essential,

1) Market-driven expansion of the sector targeting domestic, regional and international markets
2) Development and promotion of the contributions6 of organic agriculture to the environment.
3) Increasing awareness and capacity on all levels from production to consumption, including institutions, support organisations and research
4) Relevant government policies are supporting the development of the sector

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[4] With organically managed is meant that the production consciously follows organic standards, but not necessarily certified.

[5] This is divided by 20 billion Tsh for the export market and 5 billion Tsh for the domestic market

[6] With this is meant the public good and services that organic can provide to society, e.g. by supplying environmental services (also called ecosystem services).

5) Strengthening coordination and communication among all actors in the sector
6) Mobilising the needed financial and technical resources

For all strategies special attention is needed to include smallholders, women farmers, youth and vulnerable groups and to recognise the importance of indigenous knowledge.

Objectives, targets and activities

Based on the strategies, objectives are proposed. The objectives are presented according to topics – Policy; Standards and Conformity Assessment; Markets and Production. Most of the strategies above are cross-cutting, e.g. capacity building is equally important for the market development as for the production.

The development programme is written so that for each area of development there is a short narrative followed by

- objectives (written in bold);
- targets and
- activities

The MKUKIHATA is not trying to address general problems of the agriculture or business environment of Tanzania, as that need to be solved by general actions and not special organic programmes. However, in some cases there may be a case to see if these are particularly damaging for the organic sector and propose actions.

It is recognised that investments in the organic sector is of high importance. The assumption is that the favourable policies proposed here and the substantially increased profile of the sector resulting from the MKUKIHATA will in itself attract investments in the sector and facilitate credits etc. Therefore there are few particular actions proposed re investments and credits (it is mentioned under market investments).

Overall policy

Tanzania recognises the relevance of Organic Agriculture. Organic is recognised for the contributions it can make in income generation, environment and health. However, most existing policies have been put in place without consideration of how they will affect the organic sector. This has led to certain policies that are de facto discriminatory towards organic farmers or trade, even if that was not the intention. Three examples are:

- subsidies of conventional inputs
- mandatory requirements for fumigation
- warehouse purchasing obligatory for some crops (e.g. Cashew)

The effects of general policies on the Organic Agriculture sector may not be a reason to refute these policies, but in those cases the sector should either be compensated or exempt from the policies.

The private sector (commercial enterprises and NGOs) have spearheaded the development of organic and this is likely to continue. This was earlier almost in opposition to government policies. Now it is time to let the sector develop as a public-private partnership, where the government takes on a facilitating role. The MKUKIHATA states the importance of official recognition of organic.

The MKUKIHATA recognizes that there are non-market values of organic that need further research, development, identification and support.

The MKUKIHATA recommends that some districts /areas are selected as pilot areas for organic farming. The purpose is to ensure that in some areas there are concerted efforts by all stakeholders and the local governments to do as much as possible. This does not mean that organic will or should be confined to these and not be practiced all over Tanzania. However, there is a need to build critical mass to allow for efficient supply of inputs and services as well as for efficient market linkages.

3.1.1 The policies of Tanzania actively promote organic farming.

Targets

a) Organic Agriculture is included in all relevant policies (environment, livestock, nutrition, food security, health, natural resources, fisheries, agriculture marketing, industries etc.) when they are revised.
b) The Organic Agriculture sector is not discriminated by government policies by year 2010.
c) There are special programmes and incentives developed for the sector starting from year 2010.
d) Three percent of agriculture budget and donor funded project funds are directly allocated to Organic Agriculture[7] by year 2010, and five percent by year 2013.
e) Organic Agriculture is mentioned positively in line-speeches by leading politicians (e.g. in budget, workshops and seminars). Ongoing.

Activities

1) Analyse how the sector is affected by current policies and make proposals to mitigate the effects of any policy that harms the sectors.
2) Seek input from the sector in the review of all relevant government policies.
3) Develop detailed plans for the relevant areas, based on the MKUKIHATA.
4) Include Organic Agriculture in programmes and projects and given priority during budget allocations and donor programmes.
5) Sensitise and educate leading policy-makers and provide them with policy briefs.

3.1.2 The organic sector is developed in a coherent way as a public-private partnership

Targets

a) There is an organic desk established in the all Agricultural Sector Lead Ministries (ASLMs) by year 2010 which is coordinating all public efforts.
b) There are assigned organic desks in all relevant ministries by year 2010.

[7] Many programmes are neutral when it comes to technology, which means that organic actors can benefit also from them.

c) The private sector is efficiently organised so that all stakeholders are represented by Tanzania Organic Agriculture Movements sector body by 2009.
d) There is a permanent National Organic Agriculture Forum (Committee/Council), with representation of both government and the private sector by year 2009.

<u>Activities</u>

1) Assign organic desks in relevant ministries
2) Support TOAM to ensure that it can engage all relevant stakeholders.
3) Establish formally the National Organic Agriculture Forum and allocate resources to it.
4) Develop capacity of all actors in the public-private partnership.

3.1.3 Certain districts are identified as strategically important and pilot projects are allocated to those.

<u>Targets</u>

a) At least 50 DADPs have included and extended support to organic agriculture by 2013.
b) At least 10 DADPs have included and extended support to organic production of non plant origin (e.g. livestock, aquaculture etc) by 2013.

<u>Activities</u>

1) Identify criteria for selecting districts to be used as pilot areas for organic development.
2) Sensitize all actors in the selected districts.
3) Train all key stakeholders including government officials.
4) Develop organic projects for approval within DADPs and for concerted actions by all stakeholders in the selected districts.
5) Develop special investment programmes in the selected districts e.g. for marketing infrastructure.

3.1.4 The ecosystem services that organic can deliver are recognised and efforts are made to compensate for them.

<u>Targets</u>

a) Organic farming contributes ecosystem services e.g., for climate change mitigation; biodiversity and soil and water protection. Ongoing.
b) Schemes are put in place to reward farmers for those services[8] by year 2011.

<u>Activities</u>

1) Develop mechanisms for rewarding farmers for ecosystems services.
2) Support pilot projects for ecosystem services by organic farmers.
3) Research the delivery of ecosystem services by organic farmers.
4) Lobby for inclusion of organic farming as an option under the climate change treaties and similar international treaties.

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[8] Note that also non-organic farmers may in some cases supply these services as well.

3.1.5 Regional cooperation is strengthening capacity, and developing markets and policies

Target

a) An East Africa Forum[9] for organic agriculture is established with network meetings, and identifies common issues for collaboration by year 2010.

Activities

1) Organise regular regional organic meetings, conferences and targeted, topic-specific seminars[10].
2) Establish other forms of cooperation and joint action, to be identified by regional conferences and seminars.
3) Lobby East Africa Community leaders for inclusion in the EAC and observer status

Standards and conformity assessment

The overall objectives for the standards and conformity assessment system is to provide the market actors (farmers, traders and consumers) with a common understanding of what organic is (standards); trust in that products sold as organic are indeed organic (conformity assessment) and a means to easily identify a product as organic which is the basis for marketing and consumer awareness activities (mark).

Market-oriented organic production was introduced based on EU standards and EU practices of conformity assessment – third-party certification. They have developed over a long time with considerable investments and servicing a well organised and affluent mature market. The EU standard is less applicable in Tanzania and the third-party certification system is costly and hard to implement. Nevertheless for the exports this will be a requirement for the foreseeable future. Regarding the standards there are opportunities to get EU recognition of the East African Organic Product Standard as equivalent.

For the domestic market the EAOPS is well adapted, however even in its current form it is hard to understand for farmers and consumers alike and needs popularisation. The third-party conformity assessment system is expensive and hard to understand for many of the farmers and alternative systems are under development. It is recommended that for the domestic market products “certified” under various systems should be accepted and promoted, keeping in mind that third-party certification will remain the option for exports, so that other systems should build closely on that to allow for a smooth transition of producers from one system to the other, and to allow for the production for the domestic market to also serve as a potential for exports.

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[9] This is almost already in existence in an informal way.

[10] There should be annual general organic get-togethers and then regular seminars and workshops in specific topics, such as market development, research and certification.

As important as to have the needed standards and conformity assessment systems, it is to capacitate all parties in the chain to understand them and to master their implementation.

For the duration of the MKUKIHATA there is not a need to establish any special organic market legislation[11] and regulation for organic production. However, towards the end of the implementation period there should be consultations in the sector to assess any such needs for the future.

3.1.6 Costs is reduced and accessibility improved of conformity assessment for Organic Agriculture

Targets

a) Conformity assessment services are accessible for all producers. Ongoing.
b) Simplified & locally appropriate conformity assessments (e.g. PGS) are established in all zones, by year 2010.
c) Certification costs by national bodies are considerably more affordable than costs offered by foreign based certification bodies. Ongoing.

Activities

1) Support to local certification bodies.
2) Analyse the cost structure for certification and identify measures to be taken to reduce costs.
3) Support half of the certification costs for organised groups and commercial projects for a period of three years.
4) Support PGS capacity development (training courses, manuals etc.; technical assistance)
5) Strengthen coordination of zonal inspection and certification services
6) Establish a mechanism for reducing costs for certification

3.1.7 Awareness on the East African Organic Product Standards and the East African Organic Mark is raised

Note: see also under markets

Targets

a) All organic producers and professionals are conversant with the EAOPS by 2010
b) One out of five city-consumers know the meaning of the Mark by 2013
c) The staff of all major food outlets know the meaning of the Mark by 2013
d) Three fourth of major food outlets has promotional displays with the Mark by 2011
e) The Mark is attractively displayed on all organic products (verified as such) sold in Tanzania by 2010

[11] With this is meant a regulation such as the EU regulation on organic products. It should be understood that organic producers and traders naturally have to follow all applicable rules in Tanzania.

Activities

1) Produce and disseminate awareness campaign materials (through various media, trade fairs, embassies etc).
2) Conduct training on existing standards for all stakeholders, including market actors.
3) Support outlets to promote the Mark.
4) Assist in the improvement of product packaging and presentation.

3.1.8 The East African Organic Product Standards and the organic conformity assessment systems in Tanzania is internationally recognised

Targets

a) TanCert[12] is IFOAM and ISO 65 accredited throughout the period.
b) TanCert is approved by the EU as an equivalent certification body by 2010.
c) Organic product certified to the EAOPS standard is accepted in important export markets by 2013.

Activities

1) Support the continued accreditation of TanCert.
2) Support the process of recognition of TanCert
3) Submit and lobby for the acceptance of the EAOPS as equivalent to the EU regulation.
4) Include the acceptance of the EAOPS and the conformity assessment system in trade agreement negotiations.
5) Participate in and support international efforts to improve market access[13] and to develop international baseline standards (IFOAM & Codex).

3.1.9 Parties in the market chain have the capacity to implement standard and the associated conformity assessment procedures

Target

a) The existence of at least 10 service providers with the expertise to advice and train the market actors in standards and conformity assessment by 2010.
b) Stakeholders implement standards and the associated conformity assessment procedures.

Activities

1) Train local service providers of expertise in standards and conformity assessment which can offer quality services to the market actors.
2) Train market actors in the required skills to implement standards and conformity assessment systems.

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[12] TanCert is currently the only locally registered organic certification body, and there is currently no need for more service providers (as the market for the service is too small for more). However if the situation changes and other certification organisations will establish themselves, the MKUKIHATA support can also be extended to other organisations.

[13] Such as the International Task Force for harmonisation and equivalences in organic agriculture, a joint, FAO, IFOAM and UNCTAD initiative.

3.1.10 Organic standards are expanded to all areas of production

Target

a) There are relevant standards (preferably as part of the EAOPS) for organic livestock[14] production, aquaculture and other areas of production as demanded by stakeholders, by year 2011.

Activities

1) Consultations and development of standards for organic aquaculture, further development of organic livestock standards, inclusion of other areas as demanded by producers

Market development

It is important to develop the domestic and the export market. For both, there is a need to have well organised supply chains. One key issue is the organisation of farmers for a consistent and reliable supply. Such organisation can also lead to farmers getting a better deal. There is also a need to strengthen the trust in the chain; this is mainly accomplished through having the parties working together and profit fairly from the business. There is also a need to ensure that the parties stand to their agreements. As a starting point a common code of conduct for all players in the organic sector could be developed that is applicable to for producers, buyers and exporters should be developed.

Efforts to promote the local market of organic products must be three-fold. It is necessary to raise awareness among the local people so as to increase understanding in the importance of using organic products. Then the products must be made easily accessible to them. Finally there is a need for a sufficient and well-organised supply of quality products. Domestic market development strategies should include measures for both the supply and demand side, including the role of imports. The domestic market development can largely be divided in four segments:

1) Premium markets in urban centres (Dar, Arusha)
2) Premium markets in tourist areas (National Parks, Zanzibar etc.)
3) Institutional procurement
4) Mass market

In the timeframe of the MKUKIHATA, the emphasis for certified production will be on the two first segments, while the emphasis for the PGS or otherwise organised production will be in the mass market and public procurement where pricing is expected to be moderate. Obviously the market strategies will differ. The fulfilment of the objectives for policy and standard and certification will contribute to the market development. However there is also a need for targeted activities for market development in terms of supply chain organisation; general management; business awareness and market information. It is desirable to strengthen the farmers role in the market chain and it is equally important to get SMEs / private entrepreneurs involved in the market chain, as they are the ones with the best ability to utilise all market opportunities. Existing supply chains for exports can also be used for domestic market

[14] There are already livestock standards in the EAOPS, but they likely need revision.

development. Marketing of products in prime tourist locations also serves as export promotion.

There is also a need to improve quality of organic products as well as their presentation in the market place. This applies equally for domestic markets as for exports. It is also desirable to increase value addition.

3.1.11 The domestic market for organic products is developed

<u>Targets</u>

Note: see also targets for Mark

a) That twenty five percent of Tanzanians are aware of what organic means by 2013.
b) That all major outlets stock organic foods by 2013.
c) That sales of organic foods in the domestic markets represents a value of 5 billion Tsh by 2013.

<u>Activities</u>

1) Develop and implement a national campaign for organic foods in 2010.
2) Develop and implement consumer awareness campaigns, in cooperation with relevant ministries, media, schools and consumer organisations.
3) Lobby public institutions e.g. schools to consume organic products by institutions and
4) Organise Zonal and national organic fairs.
5) Identify and support existing retailers to sell organic produce
6) Develop and implement pilot campaigns in 50 districts to promote organic and 'safe' foods targeting primary and secondary schools.
7) Develop and implement cooperation between organic producers and suppliers and the tourist sector.

3.1.12 The proper support services and infrastructure for the domestic market is developed

<u>Targets</u>

a) At least 5 farmer groups per district in 50 districts are organised in domestic marketing chains by 2013.
b) 3 SMEs per district are engaged in organic value-addition and marketing by 2013.
c) There is a central market information service and the information is efficiently distributed to the stakeholders by 2010.
d) There is a sufficient supply of business support services for the organic sector throughout the period.
e) There is a code of conduct for the actors in the value chain by 2010.

<u>Activities</u>

1) Develop capacity in business support providers.
2) Develop capacity of farmer organisations and those that support them for all aspects relevant for the marketing, such as post-harvest procedures, business planning, quality control etc.

3) Support farmer groups to organise for the market.
4) Support SMEs that want to enter organic markets
5) Establish a central market information system and development of means to feed in and feed out the information.
6) Develop a code of conduct for the organic trade and make all actors abide to it.

3.1.13 The exports of organic products is further developed

Targets

a) The value of organic products exported from Tanzania is 20 billion Tsh in 2013.
b) The number of organic exporters has reached fifty by 2013.

Activities

1) Annual participation of TZ exporters in the Biofach trade fair.
2) Support participation of TZ exporters in other relevant fairs (Dubai, South Africa, other fairs in the EAC).
3) Present export products in prime tourist locations (e.g. in tourist hotels).
4) Support other promotional efforts.
5) Cooperation between the exporters in their export marketing efforts, and public support to such cooperative efforts.

Production

There are many traditional farmers that are almost complying with organic standards. However, this does not mean that they have utilised the potential of organic farming. There are tremendous opportunities for improvement of the production mainly through the biological intensification of the production system, with more crops, efficient nutrient cycling, improved fallow, irrigation, composting, soil fertility management, collection of organic matter etc. The best practices are rather site specific, but farmers can get inspired by seeing the good results of others. To document and analyse the best farms and to share their experiences (both in documented form and directly through study visits) is an important method. Training and extension needs to go further than merely compliance with standard. In organic it is even more important to work with the farmers (e.g. with farmer field schools) and build on their experiences rather than delivering top-down extension messages. Existing traditional knowledge needs to be documented and the experiences disseminated.

Increased used of inputs is likely to be important for high-value crops, while for the production of food crops and commodities, it is not realistic to expect any high use of inputs. There is a general feeling that synthetic inputs need to be replaced by similar "organic" ones. However in many case a better design of the production system (e.g. improved crop rotation) is a better and cheaper option. It will be useful to monitor the development of key soil fertility indicators in selected farms, with and without use of external inputs to evaluate the real needs. Many pests will be naturally regulated in an organic system, but there will still be a need for inputs useful against some economically important pests. Ultimately, there would be benefits of registration and testing of those inputs; however the volume of organic production is still too low to carry the burden of such an overhead. More pressing is actually the low availability of relevant inputs. The increased use of waste or residues from agriculture and food processing should be promoted.

In Tanzania, these are well established legislations for the registration of pesticides, fertilizers and seeds. The Tropical Pesticides Research Institute (TPRI - Arusha) is mandated to test and register all pesticides produced, imported into and used in Tanzania. The National Soils Research Programme (based at Mlingano Tanga) tests and approves all fertilizers used in the country. The Seeds Act (2005) regulates the production, importation, quality and trade of seeds. Certainly all these legislations, regulations and procedures were not formulated with the organic agriculture sector in mind. There is a strong need for a review of these systems to identify their potential positive or negative impacts on the growth of the organic sector.

As long as the Tanzanian government and development partners are subsidising conventional inputs, it is reasonable the organic farmers can get a similar support (see under Policy). Equally organic farmers and SMEs should benefit from credit schemes and investment supports. Direct support for organic production as such is not recommended, however, organic farmers could be compensated for environmental services that they deliver (see under Policy); for certification costs and for marketing initiatives.

Research is needed. Similar as for extension it should build on the real needs of the farmers[15]. Research should be carried out in a participatory manner with farmers, and efforts must be made to disseminate research results to farmers and other stakeholders. Indigenous knowledge needs to be collected, documented, validated and built upon. It is also important that research looks into longer-term issues that may not be observed by the farmers so easily, e.g. long-term soil fertility changes; changes in farm bio-diversity and changes in organic matter. Finally research is needed to show policy makers the impact of organic, such as economic changes and poverty reduction.

Organic farming is much associated with crops. However, the organic system also includes livestock, bee keeping, aquaculture and wild collection. The EAOPS includes standards for livestock, bee keeping and wild collection but not yet aquaculture. Special efforts are needed to spread the organic concept into those areas where it is not yet so spread or understood.

3.1.14 Farmers get the technical assistance they need for being successful organic farmers and increase productivity

Note: see also under research

[15] The real needs are not always the needs expressed initially, especially for farmers that have not practiced organic actively. Their spontaneously expressed needs will mostly be about finding organic inputs that do the same as any conventional input they used before, while the more experienced organic farmers normally see that this input-substitution approach is not the right one.

Targets

a) Yields in organic systems increases with thirty percent by 2013.
b) Half of all extension workers[16] have undergone basic organic training course by 2013 and there are tailor-made organic courses for new employees.
c) Ten percent tenth of extension workers have undergone advanced training in organic and are identified as organic resource persons by 2011.
d) All organic projects and farmer groups have access to qualified extension by 2011.
e) There are sufficient materials available both for training of extension workers and for training of farmers throughout the period.
f) There is one national organic research and training institute[17] by 2010.

Activities

1) Identify and reward best practice for efficient delivery of organic advisory services (approach & methodology) and for producers.
2) Sensitize the extension system.
3) Produce/compile, review and extension training materials.
4) Develop and conduct organic training programs for public and private extension workers and field staff- tailor made courses.
5) Establish one national institute with the task to conduct research, collect and disseminate relevant information and contacts to field staff and producers
6) Establish Organic Farmer field schools.
7) Conduct farmer exchange visits and field days.
8) Disseminate organic best practices and resource materials.
9) National organic curriculum development

3.1.15 Organic inputs and seeds are available and used efficiently

Targets

a) There is sufficient knowledge among extension staff to recommend economically and biologically efficient inputs to organic farmers
b) Organic inputs that are offered in the market place correspond to the needs of the farmers
c) There are organic inputs available in all zones[18]

Activities

1) Identify and sensitize input suppliers.
2) Conduct and document field trials of inputs that are on offer in Tanzania as well as potentially interesting inputs[19]; disseminate the results.

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[16] Extension workers include those in public, private and civil society organisations
[17] Note that such a centre also proposed for market information. It is probably best if these are in the same institute rather than separate centres.
[18] This can be specialised dealers or just that the organic inputs are stocked by general agriculture stores.
[19] This implies that there should be funds and procedures that allow for import of potentially interesting inputs for them to be tested in the field

3) Review and propose amendments to the relevant regulations for inputs and seeds.
4) Support analysis of and research on inputs.
5) Conduct a survey of the potential for more efficient use of waste and residues from agriculture and other natural resource industries (e.g. fisheries) and agro-based industries (food, textile, bio-energy etc.) to supply organic farmers with valuable fertilisers. Support the recommendations emerging from such a study.
6) Test seeds for use under organic production.
7) Waive compulsory seed treatments for organic farmers and make available untreated seeds. Develop and promote alternative seed treatments.
8) Capacity building in production of organic planting material and other inputs and technologies

3.1.16 Organic research is established and oriented to the needs of the farmers

<u>Targets</u>

a) Farmers' Organic Agriculture and traditional practices and research needs are identified, documented and evaluated by 2011.
b) Farmers participate actively in research in at least ten pilot projects under the overall coordination of the national centre by 2013.
c) Organic research is efficiently coordinated by national organic research institute by 2011.

<u>Activities</u>

1) Document existing organic and traditional practices.
2) Assess organic farmer research needs
3) Establish ten pilot research projects
4) Establish a National Organic Agriculture Research Coordinating Committee to evaluate and approve research recommendations on pesticides, soil amendments, seeds, feeds, medicines, practices, etc.
5) Special research emphasis on the contribution of organic agriculture to sustainable livelihoods and food security
6) Organic fertiliser and pesticide recommendations are developed for key organic products
7) The safety and sustainability impact of chemical inputs is assessed.

3.1.17 There is sufficient know-how in the organic sector

<u>Target</u>

a) Organic agriculture is integrated in all relevant training and education by 2013.
b) There are special trainings and education opportunities for organic experts by 2009.

<u>Activities</u>

1) Develop curriculum for organic training in schools, colleges and universities.
2) Introduce organic agriculture subjects/courses to schools and higher education.

3) Produce and maintain an inventory of experts / resource persons specializing in organic agriculture.

3.1.18 Organic livestock production, bee keeping, wild production and aquaculture is further developed

Target

a) There are relevant production manuals for organic livestock production, bee keeping, wild production and aquaculture by 2011.
b) There are identified experts on organic livestock production, bee keeping, wild harvesting and aquaculture by 2011.

Activities

1) Document the current extent of organic livestock production, bee keeping, wild production and aquaculture (certified or not) and the practices applied by the producers.
2) Identify and conserve indigenous plants and breeds.
3) Study, analyse and recommend improvement and actions for those sub-sectors.
4) Conduct workshops with experts and practitioners to further develop the concepts.
5) Produce manuals of production.
6) Raise awareness of producers, NGOs and extension workers.

4 Implementation

Advocacy

There is a need to step up advocacy[20] for organic agriculture. The advocacy should address main policy goals, notably food security, income generation and economic growth. Furthermore, advocacy needs to address the prevailing problems with regard to conventional agriculture. The advocacy should target the media, government at all levels, development partners, farmer and market organizations.

Action plans for intervention areas

The MKUKIHATA has broadly formulated activities, and there is mostly no identification of the key responsible actor or the needed resources. For each area of development more detailed plans need to be elaborated and resources be allocated. Some of the issues are clearly for the government and development partners to act upon; others are mainly for the non governmental actors, such as NGOs, farmer groups and enterprises. The action plans should identify the actors more specifically; prioritize actions identify those that can be done with available resources.

Resources

The resources needed for this programme to become reality are substantial and will require commitments from:

- Government through budget allocations;
- development partners through both basket funding and direct project/programme support;
- private sector actors, including farmers and
- international or national schemes for eco systems services, such as carbon credits

Establishing baseline data & monitoring

There is a lack of reliable data of the organic sector in Tanzania. This distorts the dialogue as all stakeholders don't have are not on the same level of information. It also makes it very difficult to monitor progress in the sector. Therefore it is necessary that data is collected and made available. For the purpose of monitoring progress according to the MKUKIHATA the following should be measured[21]:

a) Number of farmers, and their respective production, involved in Organic Agriculture, separating certified, PGS or other conformity systems and those that are not part of such a system. Data should also be socio-economically disaggregated. "Ownership" of certification should be monitored.

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[20] Note that this about advocacy for the implementation of the programme, which means this is targeting policy makers and other key actors. Other targets for advocacy are identified under other chapters, e.g. markets.

[21] Wherever relevant these data shall be compared with data from the non-organic sector, e.g. re prices, volumes, environmental impact.

b) Number of NGOs and enterprises, including SMEs involved in the organic sector, disaggregated on their field of work (market, input supplies, service providers)
c) Availability of certification services and its costs.
d) Domestic market volume.
e) The kinds of and numbers of outlets selling organic foods.
f) Price information.
g) Export volume of Organic Agriculture, disaggregated for products
h) The extent of value-addition (processing) and branding of organic products for domestic and export markets
i) Productivity (yields) of organic farmers
j) Profitability of organic production in different stages of production
k) Environmental impact of Organic Agriculture
l) Impact on health of farmers and farm workers of organic production
m) Impact on food safety (e.g. pollutants in food)
n) Impact on communities and social capital
o) Access to extensions service for Organic Agriculture
p) Access to inputs and technologies
q) Government & development partners' investment in the sector
r) Research support to Organic Agriculture
s) Awareness and sensitization for Organic Agriculture production among extension workers
t) Consumer awareness of organic products and the East African Organic Mark
u) Availability of education on Organic Agriculture on all levels

Notably some of the indicators are difficult to assess on a large scale, in particular the productivity and profitability on the farm level and the environmental impacts.

There is a need to clarify which institution(s) that is responsible for the establishment of baseline data and the ongoing monitoring of the development. Some are for e.g. TOAM, others for relevant ministries or agencies and some for research institutions. Whoever is going to do it, there is a need for funds and sometimes also technical assistance to develop the parameters and methods. The national resource centre should get the data from all actors and disseminate it to all stakeholders.

Review

The National Organic Agriculture Forum shall annually asses the indicators and the data and amend the strategies accordingly.

A more comprehensive review, including stakeholder consultations should take place year 2011 and revisions of the programme should be done if necessary.

Evaluation

In 2014 a team of experts shall be assigned to evaluate the results of the MKUKIHATA. Based on that evaluation and stakeholder consultations, a new development programme may be proposed.

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Twarog Sophia (2006) in Trade and Environment Review 2006 UNCTAD/DITC/TED/2005/12, Geneva

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More reading of relevance

Developing Sustainable Organic Sectors, IFOAM Bonn 2007
Report from Policy Workshop in Nairobi December 2006
CBTF Integrated Assessment for Tanzania, UNEP 2008
CBTF Best Practice for organic policy, UNCTAD 2008

Annex 1: The National Organic Agriculture Forum

The National Organic Agriculture Forum-NOAF was initiated soon after the organic conference held in Dar es Salaam in May-June 2007. Its establishment started long before when representatives from the public sector were invited to participate in organic agriculture events and during the CBTF Integrated Assessment Study in 2005 to 2007. It is a forum for public-private and civil society dialogue on organic agriculture development. It is not member based but rather a representation of public authorities/institutions on one part and non-state Actors (stakeholders) on the other where key institutions dialogue and take up responsibilities for developing the organic agriculture sub sector.

Three meetings were organized at the Ministry of Agriculture and following resolutions were reached.

9) A task force and TOR for drafting a national organic agriculture programme/strategy
10) Draft policy objectives and statements for organic agriculture inclusion in the national agriculture policy which is under review.
11) Invite other parties/authorities that have stake in organic agriculture – Ministry of Livestock, Board of external Trade, Ministry of Trade and National Environmental Management Council-NEMC.

Participating organizations from the start have been as listed below;

Ministry of Agric (Kirenga, Ada Mwasha)	Chair
TOAM (JG, NK)	Secretary
TanCert (LM, KB)	Attendee
Envirocare (LL, EM)	
BET (MG)	
MOLF (EM)	
Biosustain (RH)	
TOFO (FM)	
Afrikabisa Organics (PBS)	

Achievements indicators;

12) Inclusion of organic section in the approved Livestock policy
13) Inclusion of organic section in the draft of national agriculture policy
14) National organic agriculture programme is in drafting stage
15) Three meetings of the Forum held from June 2007.

Annex 2 Stakeholders in organic agriculture

Associations dedicated to organic
TOAM
TOFO
KIHATA
OFA/UHAI
ZAFFIDE

NGOs working with organic
SHICANET/SCOA (Southern Highland Caritas Network Tanzania/SHICANET Center for Organic Agriculture, in establishment)
World Vision Tanzania
Heifer Tanzania
Floresta
Global Service Corps
Hearts-Helping-Hands
PELUM Association (Africa region)
Sustainable Agricultural Fellowship
UMADEP
FAIDA-MALI
CARITAS MAHENGE
ZAFFIDE
RUCODIA

Government institutes and agencies
TPRI
Selian Agricultural Research Institute
Livestock Training Institute at Tengeru
Sokoine University
Ukiriguru (Agr. research Institute Mwanza)
TBS
BET
MAFC

Service providers
TanCert
Eco Agri Consult
Matchmakers
Agro Eco Tanzania
Grolink / Kilimohai Afrika
IMO
Bio inspecta
CERES

Business associations/Companies
AFROX
Bio Sustain

Biolands
Biore
PCI
FIDAHUSSEIN
Kimango Farm
Lumumba Farm
Mikese Farm
Pelum Tz
UMADEP
TAZOP
GFP
HAI TZ LTD
MAYAWA
MATUNDA MEMA
OLAM
Luponde Tea Estate
BIOTA

Magazines, publishers
Sustainable Farming Outreach
Ukulima Endelevu
LEISA
The Organic Bulletin

Partners
HIVOS
ADF
SIDA
CBTF
ITC
Cordaid