REPORT ON THE STUDY FOR CONDUCTING AN ANALYSIS ON THE LEVEL OF ORGANISATION OF THE ORGANIC SECTOR IN AFRICA AND HOW TO STRENGTHEN THE ORGANISED ORGANIC AGRICULTURAL SECTOR THROUGH THE INTER-CONTINENTAL NETWORK OF ORGANIC FARMERS' ORGANIZATIONS (INOFO).

Submitted to Andreas-Hermes-Akademie and BOD of INOFO

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Acronyms

AE	Agro-ecology
AFD	French Development Agency
AfDB	African Development Bank
AfrONet	African Organic Network
AFROREC	African Organic Research Conference
AFSA	Alliance for Food Sovereignty in Africa
AHA	Andreas Hermes Akademie.
AOC	Africa Organic Conference
ARBE	(Department of) Agriculture, Rural Development, Blue Economy, and Sustainable Environment (of the African Union)
AU	African Union
AUC	African Union Commission
BOD	Board of Directors
CAADP	Comprehensive Africa Agriculture Development Programme
COMESA	Common Market for Eastern and Southern Africa
CSC	Continental Steering Committee
CSO	Civil Society Organisations
DREA	Department of Rural Economy and Agriculture
EAAC	Eastern Africa Agroecological Conference
EAC	East African Community
EAFF	Eastern Africa Farmers Federation
EAOPS	East African Organic Products Standard
ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of West African States
EOA	Ecological Organic Agriculture
EOA-I	Ecological Organic Agriculture Initiative

EPOPA	Export Promotion of Organic Products from Africa
ESA	Eastern and Southern Africa
EU	European Union
FAO	Food and Agriculture organization of the United Nations
FARA	Forum for Agricultural Research in Africa
FENAB	*Federation Nationale pour l' Agriculture Biologique*
FiBL	Research Institute of Organic Agriculture
FO(s)	Farmers' Organization(s)
FTA	Free Trade Area
IFAD	International Fund for Agricultural Development
IFIs	International Financial Institutions
IFOAM - OI	International Federation of Organic Agriculture Movements -*Organics International*
IGAD	Intergovernmental Authority on Development
INOFO	Intercontinental Network of Organic Farmers' Organisations
ITC	International Trade Center
KOAN	Kenya Organic Agriculture Network
NEPAD	New Partnerships for African Development
NGO(s)	Non-Governmental Organization(s)
NOAMs	National Organic Agriculture Movements
NOAN	Association of Organic Agriculture Practitioners of Nigeria
NOARA	Network of Organic Agriculture Researchers in Africa
OA	Organic Agriculture
OD	Organizational Development
OFO(s)	Organic Farmers' Organization(s)
PAFO	Pan African Farmers' Organization
PCAO	
PELUM	Participatory Ecological Land Use Management
PGS	Participatory Guarantee Systems

PROPAC	Plateforme Régionale Des Organizations Paysannes D'Afrique Centrale
RECs	Regional Economic Communities
RFAFO	Regional Farmers' Forum (of IFAD)
ROPPA	Réseau des Organisations Paysannes et des Producteurs Agricoles de l'Afrique de l'ouest,
SACAU	The Southern African Confederation of Agricultural Unions
SADC	Southern Africa Development Community
SDC	Swiss Agency for Development and Cooperation
SIDA	Swedish International Development Agency
SSN	Seed Savers Network
SSNC	Swedish Society for Nature and Conservation
STC	Specialized Technical Committee
UMAGRI	Union Maghrébine et Nord Africaine des Agriculteurs
UTF	Unilateral Trust Fund
WACOMP	West Africa Competitiveness Support Program
WCA	West and Central Africa
WWF	World Forum of Fish Harvesters & Fish Workers

Executive Summary

The Intercontinental network of organic farmer organizations (INOFO – www.inofo.bio) commissioned a study for conducting an analysis on the level of organization of the organic sector in Africa to identify key stakeholders, and for preparing suggestions on how to strengthen the organized organic agricultural sector.

Since 2017, INOFO has been developing globally, establishing functional organization structures with support from AHA – Andreas Hermes Akademie. INOFO has currently shifted her focus on strengthening its structures at the grassroots where the membership resides, starting with INOFO Africa.

According to the recent FiBL statistics on the Development of OA in Africa, indicate that generally, Organic Agriculture in Africa is on a strong growth path.

The study objectives were to find out:

- The challenges of organic farmers' organizations regarding the strengthening of an organic agricultural sector.
- The potentials of organic farmers' organizations in contributing to the strengthening of the organic agricultural sector.

The main data for the study was collected using two separate Kobo Toolbox software online tools (with English or French language preference) were developed and deployed to the targeted the OFOs and non-OFOs stakeholders involved in the organic Sector in Africa respectively via the INOFO Africa email handle (africa@inofo.bio) with follow up on phone calls or WhatsApp messaging. The data was collected between 07th March and 03 April 2023.

Data was analyzed using the Kobo Toolbox results after cleaning and other analysis tools in excel. The results were presented in graphical illustrations, tables and narrative discussions.

The survey received an enormously positive response all across Africa with a total of 111 respondents; 64 OFO respondents and 47 non-OFOs (Other key Stakeholders) from 15 countries across Africa including Zambia, South Africa, Malawi, Mauritius and Namibia from Southern African; Kenya, Uganda, Rwanda, Ethiopia and Tanzania from Eastern Africa; Ghana, Senegal, Togo, Mali from West Africa and one from Democratic Republic of Congo in Central Africa.

The OFOs included 30% Cooperatives, 22% Ordinary Farmer groups and 25% from Other Categories. The membership size greatly varies for all the three categories ranging from as few as only 6 members to as many as 16,102 generally constituted by more Females (54%) than males (45%) with youth in the age category of 13-35 years catering for less than ¼ of the members, with some groups exclusive to youth or women.

The majority (34%) of the non-OFO stakeholders Other Civil Society or Non-Government Organization promoting Organic and/or ecological agriculture at country level; 19% were National Organic Agriculture Movements (NOAMs), 8.5% were National Coalition/Network/Alliance/Forum for Non- state actors promoting Organic and/or ecological agriculture, 6.4% Research Organization at Regional/African Level involved in

Organic/Ecological Agriculture Research, 4.3% were Regional Coalition/Network/Alliance/Forum for Non- state actors promoting Organic and/or ecological agriculture in Africa among others.

The Challenges faced by OFOs in the OA sector in Africa were categorized in three sets of priorities. The first priority challenges that were identified in the study were: Limited Access to Markets for Organic Produce, Inadequate knowledge and skills in OA agronomy; Soil fertility management; Pest & Disease Management in OA; Limited Access to Financing OA development and Lack of Legislation and policy framework to safeguard OA operation space.

The Second priority challenges were: Climate Change and its impacts on smallholders; Limited Access to Organic seed and to sell Organic Seed; Inadequate Organizational Development (OD) at OFO Level, sectoral level and High costs for Organic Certification.

And the T**hird priority challenges were:** Low Awareness levels among farmers and Consumers on benefits of OA Limited Access to Organic farm inputs; Limited capacity in Farm production Planning; Limited services in OA extension, Limited Advocacy & information dissemination**;** Producing enough healthy food amidst shrinking agricultural space **and** Poor Networking among actors in the OA sector.

Five key major needs of OFOs required to address the challenges they face in the OA sector in Africa were identified as follows in a descending order of priority: 1. Increased funding commitment into OA development. 2. Inclusive policies such as access to quality sustainable seeds, financial investment in OA advocacy activities and Improved Extension services for OA. 3. Organizational Development for OA business development. 4.Investment in bilateral negotiations or community round table dialogues for fair prices. 5. Collective efforts to address climate change challenges.

The stakeholders are in agreement with INOFO to take on the role of a Pan African Network with OFOs playing a center role in the strengthening of the organized Organic Agriculture in Africa if INOFO shall be able to: Mobilize resources to strengthen OFOs within the Pan-African Network for OA Promotion in Africa; Engages stakeholders to harmonize organic standards, facilitate market access for OFOs to promote regional trade and collectively influence policy reforms as expressed by the stakeholders.

There are a wide range of opportunities for collaboration with stakeholders at different levels, which may require a case-to-case approach to understand and agree on specific terms of Collaboration.

CHAPTER ONE

1.0 Introduction

INOFO – The Intercontinental network of organic farmer organizations is a self-organized structure within IFOAM whose key objective is to amplify farmers' rights. INOFO connects Organic Farmer Organizations – OFOs/farmer groups to national, regional and global platforms through active participation and inclusion processes, ensuring that the needs and rights of local farmers are guaranteed and protected.

In partnership with Andreas Hermes Akademie (AHA), INOFO has, in the recent past, focused its development on establishing organization structures at global level through a series of Organizational Development processes and capacity building training for the elected conveners in the INOFO Council and the Board Members. This resulted into the development of a Vision, Mission and the Organization structure with key impact areas as outlined below:

INOFO's Vision: A world of regenerative and sustainable food system for all.

INOFO's Mission: To unite organic farmers and support their voices, at all levels of the food systems development towards producing healthy, nutritious food and preserve mother earth.

Impact Areas: Advocacy, Knowledge sharing and Training, Leadership and Capacity building, Organizational Development and Governance.

INOFO has currently shifted her focus on strengthening its structures at the grassroots where the membership resides, starting with INOFO Africa.

This comprehensive study follows an earlier synopsis on how the Organic Agriculture sector in Africa is organized, in the bid for INOFO to understand which roles it can play as an intercontinental to make a contribution in the strengthening of the sector.

1.1 Background Information

1.2 Background to the organized Organic Agriculture in Africa.

Organic agriculture is a major agriculture option for which Africa as a continent must consider developing (Isaac K. A & Ernest K. K, 2015). Organic agriculture has been practiced in Africa for ages but according to Parrot et al, (undated) the practice has been in the informal sector without certification. Organic agriculture has the potential to increase productivity whilst minimizing the negative impacts on the already degraded environment. It has improved livelihoods for small-holders in developing countries while minimizing the use of external resources that could become increasingly unaffordable as the world's rapidly growing population increases its demand for scarce resources needed for conventional agriculture, particularly water and energy (Bennett and

Franzel 2013). Different actors in the Organic agricultural sector are therefore advocating and pushing for organic agriculture as the suitable form of agriculture for the continent.

Organic agriculture in Africa is gaining momentum. There is a growing recognition among policy makers that organic agriculture has a significant role to play in attaining Africa's food security (Agama, 2015). In the late 1990s and early 2000s, development of Organic Agriculture in Africa focused on produce for export to Europe. A case in point was the Export Promotion of Organic Products from Africa - EPOPA project. This program was created by the Swedish International Development Agency (SIDA), ran projects in Uganda, Tanzania and Zambia. Participating countries were given the opportunity to increase and diversify their exports, while at the same time the agricultural sector was exposed to innovative and environmentally sound farming techniques. While targeting smallholder farmers to benefit from premium prices for their organic crop, different stakeholders including exporters such as cooperative unions, local and expatriate entrepreneurs and subsidiaries of international trading houses were engaged to facilitate organic trade. Consequently, this attracted supportive services such as setting up of domestic certification bodies, providing training to the wider public, and linking up with national networks to establish a solid basis for the organic sectors in the countries.

Since then, there has been improvement in many aspects of organic production in Africa. By 2013, Organic agricultural land area in Africa remained steady in between 2010 and 2011 (Bouagnimbeck, 2013). However, there was an increase of almost 78,000 ha (7%) in 2013 compared to 2012 (Lernout et al (2015). There were 1.2 million hectares of agricultural land in 2013, constituting 0.2 percent of the continent's total agricultural area and 3 percent of the global organic agricultural area. As compared with 52 000 hectares of land in the year 2000, the organic agricultural land had increased by more than 1 million hectares in 2011 (Bouagnimbeck, 2013).

There are more than 574 000 organic producers in Africa (Lernout et al 2015). The countries with the most organic producers were Uganda (189 000), United Republic of Tanzania (148 000), and Ethiopia (134 000) (FiBL - IFOAM 2015). Recently, Tanzania has been leading in Africa and ranked 4th in the world for the number of organically certified farmers with about 278,467 hectares of land are under organic production and 148,610 Tanzanian farmers applying organic production practices (FiBL and IFOAM 2020).

By 2015, there were extensive discussions and consultations among various stakeholders and partners from various parts of the African continent and beyond to develop an overarching strategic plan for the Ecological Organic Agriculture Initiative (EOA-I) in Africa. The plan recognizes ongoing agro ecological initiatives in Africa to address food insecurity and safeguard the environment. It also aims at firmly complementing the continental efforts spearheaded by the Department of Rural Economy and Agriculture (DREA) and the Comprehensive African Agriculture Department Programme (CAADP) of the African Union Commission (AUC). In her statement to launch the strategic plan EOA-I 2015-2025, the Chairperson of the EOA Steering Committee affirmed that African leaders have committed themselves to promoting agriculture including ecological organic agriculture, and this will bolster the African Union Commission's targets for the next decade.

Basing on the strong foundations of the NOAMS – National Organic Agricultural Movements, which were established as firm local establishments in the different countries across the continent, with close collaboration with the IFOAM – International Federation of Organic Agriculture Movements, a number of African Countries have registered progress of the organic sectors in strategic areas including policy development, increase in number of organisations promoting advocacy activities, which have in turn led to an increase in organic producers. NOAMs are organized under AfrONet – The African Organic Network with a vision of a united and vibrant African Organic Agriculture that transforms and empowers communities for sustainable livelihoods.

However, there has been a missing link directly focusing on grassroot smallholder organic farmers who produce food for their households and also engage in local trade for the sustenance and improvement of their livelihoods. Despite their continued efforts to uphold the principles of organics – Health, Ecology, Fairness and Care, there isn't enough focus on directly supporting their OFOs to enable them build their capacity to benefit from the on-going programmes that support organics. This has led to the continuous exclusion of the majority of smallholder organic farmers in Africa from the organic statistics and hence no benefits have trickled down on their farms and households to improve their livelihoods because of the continued exclusion in many of commissioned programs and projects.

As part of reforms within the international Arena of the Organic Sector, IFOAM implemented an IFAD funded a capacity building programme (2014-2016) to strengthen INOFO and to define and manifest farmers' strategic priorities, contributing to the empowerment of organic smallholding family farmers in Africa, Asia and Latin America. This included the mapping exercise which documented the existing OFOs connected together through INOFO. This led to the 'rebirth' of INOFO whose initial efforts had started way back in 2008. The program activities brought together OFO representatives from Africa, Asia, Latin America and Europe. Since 2017, INOFO has been developing globally, establishing functional organization structures with support from AHA – Andreas Hermes Akademie. Through this established partnership, INOFO strives to reach out to the OFOs at the grassroots to engage them to play an active role in the OA sector at all levels.

Although most of the OFOs within Africa have weak organisational structures and are considered as informal, these grassroot structures are the basis of the organisation of organic agriculture on the continent. They bring together smallholder family farmers, to share experiences and facilitate knowledge transfer from one generation to another as a form and source of livelihood to their families, including women, men, youth and children through directly providing safe and nutritious food, and providing income derived mostly from on-farm sale of produce to facilitate other basic household needs including health and education for children. The informal status usually renders them ineligible to participate in ongoing programs targeting small scale producers, yet they are the custodians of 80% of the land and food that feeds 1.1 billion in Africa and beyond. This particularly affects small scale producers since it further limits their capacity to participate in local, regional and international trade, recognized as organic. The lack of direct support to build the capacity of OFOs in Africa to achieve formal status with functional structures is a key underlying factor that limits full exploitation of the existing opportunities in organic trade, especially that of harnessing the untapped local and regional trade opportunities using alternative Organic Guarantee Systems such as PGS, National Organic Policies and Regional standards such as the EAOPS to facilitate trade and promote inclusion of grassroot small scale producers within their OFOs.

1.3 Current trends in the development of Organic Agriculture in Africa.

1.3.1 Organic Agriculture Statistical trends in Africa.

According to the recent FiBL statistics report (2020/2021) on the Development of OA in Africa, the total organic farmland under production is about 2.7million hectares with an increase in the number of organic producers reaching 442,274 contributing to the total global growth rate of 5.8%. The total exports from Africa into the global market are at a tune of 458,702 Metric Tons. Generally, Organic Agriculture in Africa is on a strong growth path (FiBL & IFOAM-OI 2023).

Biovision Africa Trust estimates about 7.8million farmers (37% women, 63% men, 28% youth) to have been reached by the Ecological Organic Agriculture Initiative (EOA-I) and are involved in Ecological Organic Agriculture practices. In the recent report on *The World of Organic Agriculture 2023*, it is highlighted that as an achievement in Africa, CAADP policy framework has now mainstreamed EOA through integration of the EOA status report in its formal documents. It was however noted that the sector is still challenged with limited resources to scale-up OA and AE in all the 55 African countries, with only 9 countries actively implementing EOA -I activities in West and Eastern Africa. The report further points out that EOA is mainly funded by external donor projects and implemented by NGOs with little involvement by government actors, limited research, development and innovations in the sector, low adoption levels and weak capacity of partners to establish and manage successful value chains attractive for investment and business development (FiBL & IFOAM-OI 2023).

1.3.2 Progress in Governance and Institutional Development for OA in Africa.

In 2019, the African Union's Specialized Technical Committee (STC) on Agriculture, Rural Development, Water and Environment officially endorsed Biovision Africa Trust as the EOA-I Secretariat and agency to oversee the implementation and reporting the progress of the implementation of the Africa Union Decision on Organic Agriculture (EX.CL/Dec.621 XVII). The signing of the Governance and institutional development Memorandum of Understanding between Biovision Africa Trust and the African Union officially took place in July 2022 in Addis Ababa, graced by H.E Ambassador Josefa Sacko, the African Union Commissioner for the Department of Agriculture, Rural Development, Blue Economy and Sustainable Environment (ARBE), and Dr David Amudavi, the Executive Director of Biovision Africa Trust. This marked a big milestone in the progress of EOA in Africa.

The implementation of EOA in Africa has since ensued despite the COVID-19 challenges. The 17th and 18th African Union CSC meetings were held in South Africa and Kenya, respectively. Key decisions and resolutions in 2022 were taken among them, included the following: − the development of a continental EOA multi-stakeholder platform to be led by the EOA-I secretariat and AfrONet, − a resource mobilisation strategy to support EOA initiatives beyond Eastern and West Africa to cover all five regions of the continent, − the streamlining of the organisation of the Africa Organic Conference (AOC, among others (Biovision Africa Trust 2023).

In pursuance of the EOA implementation plan in Africa, the 1st Eastern Africa Agroecological Conference (EAAC) was held in Nairobi, Kenya, in March 2023 under the theme of "**Transforming Food Systems for Responsible Production, Consumption and Social wellbeing"**. The Conference brought together several actors from within the East African region and beyond to discuss the progress of EOA in the region as were presented in the different abstracts under six thematic areas. INOFO participated in the preparatory Regional Support Team meetings for the conference and was represented by the President of INOFO Ms. Shamika Mone who presented a Key Note Speech on the: **Role of Farmers' Movements in Promoting Agroecology in Africa** under **Sub theme 3:** ***Women and Youth in Agroecology.***

Among the abstracts that were presented by stakeholders in the OA sector to demonstrate progress made, potentials and challenges, included the following: Agroecological practices to provide effective means for climate change adaptation by improving the resilience of farming systems; Food system reform, coupled with comprehensive debt relief and restructuring for economic transformation in Africa; Co-creation of agroecology business development assessment tools for improving access towards Agroecology markets; the use of microbes for improving soil fertility in controlling crop pests and diseases; the potential in digital training to improve farmer access to knowledge and learning; Mainstreaming agroecological policy and legal frameworks in Agriculture for Transforming Food Systems - *The Case of Muranga and Kiambu Counties in Kenya show casing bottom-top inspired policy drives*; Informal seed exchange and own Seed production by farmers as key pillars of Agriculture, a case in Tanzania and many more topics were shared (https://eoai-africa.org). In the conference discussions, it was also well-exhibited how the different stakeholders can collaborate at different levels, with common overlaps between local-regional-international relations in project implementation at community level, research, both state and non-state actors and multi-partner projects across countries in different sub-regions in Africa.

Another key event that was recently held in Africa was the 4th AFSA Biennial Food Systems Conference, held in Yaoundé, Cameroon in November 2022. The event was under theme of: "Mobilizing African Food Policy and Action for Healthy Food Systems." Held in the African Union Tear of Nutrition, the conference aimed at mobilizing African citizens and governments to demand for changes in food policies and to implement urgent actions for healthy, nutritious and inclusive food systems.

Among the key recommendations that were made included: A call to African Governments to become strategic partners in strengthening the institutional capacities of farming communities to pursue agroecology, which enhances food production, improves incomes, and provides nutrition security for local communities at low costs; African governments should prioritize agroecology to build resilience in food systems in the face of crises such as the covid-19 pandemic; called upon the African Union Commission to prioritize the development of a Food Systems Policy anchored on African cultural foods and dishes, recognizing their value to people's health and nutritional security; Donors to direct funding towards upscaling programmes, aligned towards the transition to agroecology; All upon all actors to embrace healthy and culturally appropriate food (AFSA, March 2023 – https://afsafrica.org)

1.3.3 Research for OA Development in Africa.

During the recent 1st African Organic Research Conference (AFROREC) that was held in Ibadan, Nigeria, in December 2022, which was organized by the Network of Organic Agriculture Researchers in Africa (NOARA), the researchers discussed matters concerning the development of the OA Research Agenda. INOFO was represented by the Deputy President of INOFO Mr. Wanjama Daniel, who is also the Coordinator for Seed Savers Network – Kenya, a National grassroot network of farmer that strengthens communities' seed systems for improved seed access and enhanced food sovereignty. At the end of the conference, the researchers made several recommendations, calling upon National governments and FARA (The Forum for Agricultural Research in Africa) to include organic agriculture and agroecology research in their activities through their agricultural research councils; Research should address the development of implements and equipment for organic agriculture and agroecology production (e.g. solar irrigation facilities) to ease labour constraints and other challenges facing smallholder farmers in Africa; Research into quality guarantee systems and agribusiness models supporting organic trade by the private sector and governmental and non-governmental organisations in Africa should be stepped up; Development partners globally should consider supporting NOARA and other like-minded research bodies to raise the level of research work into organic agriculture and agroecology research in Africa. Producers should be supported with technologies and innovations to conserve indigenous seeds and to ensure sustainable conversion from conventional to organic agriculture or agroecology, motivated by the demonstrated resilience and productivity-enhancing features of the later systems (*Draft AFROREC Communique, 2022*).

CHAPTER TWO

2.0 Methodology

The purpose of the study was to provide basic information in the process of analyzing the level of organisation of the organic sector in Africa so as to identify the key stakeholders in the sector, and for preparing suggestions on how to strengthen the organised organic agricultural sector.

Prior to the study, a desk-research was conducted to map relevant organic Farmers' organizations (OFOs) that are associated with the Intercontinental Network of Organic Farmers' Organisations (INOFO), highly active in the organic sector in Africa and have potential to be associated to an African Network of organic FO.

Similarly, a mapping of relevant stakeholders that influence the organic sector in Africa such as: Organisation in the field of research, international cooperation, policy advisory, etc.; Regular Farmers' Organisations (FO) on national, regional or continental level.

The process of identifying and mapping key stakeholders involved desk research of assessing the respective stakeholders based on the information available on their websites, activity and programme reports, annual reports and other different reports of programmes implemented at regional or continental level through collaborations, partnerships under a common fund or collective initiatives.

2.1 The Study objectives

The study objectives were to find out:

(i) The challenges of organic farmers' organizations regarding the strengthening of an organic agricultural sector.
(ii) The potentials of organic farmers' organizations in contributing to the strengthening of the organic agricultural sector.

2.2 The Study Hypothesis

Study was based on the Hypothesis that "**Stakeholders in the organic sector in Africa do embrace/shall embrace/have embraced INOFO's role as the OFO-led Inter-Continental Network of Organic farmer organisations (INOFO) targeting OFOs at the grassroots through active participation and inclusion processes, ensuring that the needs and rights of local farmers are guaranteed and protected *(H=1)*".**

2.3 Research Questions

The study aimed at carrying out logical investigations to answer the following research questions:

1. Who are the stakeholders in the organic agriculture sector in Africa?

2. Who are the stakeholders outside the OA sector but within the Agricultural domain and have influence on the OA sector in Africa?
3. What purposes do the stakeholders in the OA sector exist to serve?
4. What are currently the major challenges in the OA sector in Africa?
5. What are the needs of OFOs to address the challenges they face in the OA sector in Africa?
6. What are the priority areas of collaboration to address the challenges?
7. What are the opinions of stakeholders on the establishment of a Pan-African Network for Organic Farmers' Organizations and its expected benefits?

2.4 Research Tools

Two separate tools were developed using the Kobo Toolbox software APP *(see copies attached)*, one was addressed to OFOs in contact with INOFO Africa and one was addressed to the Other Non-OFO Stakeholders in the Organic Agricultural Sector to collect data and feedback from them based on the above research questions to inform the process of analyzing the level of organisation of the organic sector in Africa, identify the key stakeholders in the sector, and for preparing suggestions on how to strengthen the organised organic agricultural sector.

2.5 Data Collection process

The tools were deployed online, as open access software links: https://ee.kobotoolbox.org/x/GEYnU4Y0 for the OFO respondents and https://ee.kobotoolbox.org/x/oJA1qQHT for the Other Key stakeholders (non-OFO respondents) – *see details of the tools in annexes 12 and 13 respectively)*. The tools could be filled-in offline after opening its content and then submitted online after successful completion. The tools had two language options, English was the main language and French was the secondary language option. The respondents were free to select their preferred language to use while reading and responding to the questions. The decision to have the tools in the two specific languages was based on the fact that the targeted respondents were from Western and Central Africa, which are francophone (French-speaking) countries as their official language while the rest (the majority) were from Eastern and Southern Africa, which mostly has English-speaking countries as their official language. Other regions that speak Arabica or Portuguese did not respond to the call to participate in the survey (via the official email and subsequent follow ups via cellphones on WhatsApp. So, no further translations options were made. The questions included both open-ended, closed-ended and questions with multiple options for responses. All the three options were used ensure that the study focus is maintained without restricting respondents to only pre-set responses but also provide to them the liberty of expressing their own opinions with their own words as a process of authenticating the study. Some questions were text-based, coordination points, while others were numerical. Both Tools were shared from the INOFO Africa email handle (africa@inofo.bio) to the respective targeted audiences as had been earlier mapped out with subsequent follow up calls of Multimedia Messaging Services (MMS) using WhatsApp. The tools were open for a period of about three weeks from 07th – 28th March 2023 and 18th March – 03rd April 2023 respectively, after which data collection was closed.

2.6 Data cleaning and Analysis

The two data sets were screened and cleaned to remove any data anomalies. Data was analyzed using the Kobo Toolbox results after cleaning and other analysis tools in excel. The results were presented in graphical illustrations, tables and narrative discussions as presented in the next chapter.

2.7 Scope of the study

The study focused on the OFOs and non-OFO Respondents who were mapped in first stages of the study but eventually included others new contacts within the INOFO network of convenors and contact persons in the respective countries. The study was based on voluntary consent of respondents and no coercion or pleasantries/gifts were used in the process.

The study did not target categories of key stakeholders including Government Agencies, African Union, UN bodies, International Organizations and donor agencies in preference for other more diplomatic approaches to be used for deeper and more beneficial engagements for INOFO and the OFOs within the network which can later be used and to create more meaningful partnerships with the other Key stakeholders that participated in the study.

The study also targeted other key stakeholders, especially Apex Farmer Organisations (FOs) in the agricultural sector in Africa but outside the organic sector, given their relevance in the Institutional landscape in the agricultural sector in the continent.

2.8 Limitations of the study

Although the study was comprehensively and professionally conducted, it faced the following limitations:

- The study was time-bound with very limited time between data collection, analysis and report writing. This limited the extent of wider reviews of existing literature relevant to the study for the provision of more detailed information.

- The study was purely a desk-study and thus no physical interactions were made with the respondents or travels to the respective countries across Africa. This may have affected some the would-be respondents who may missed the survey due to a missed email (in spam folder, unnoticed or otherwise).

- The study greatly relied on the existing contacts of INOFO across Africa based on previous participation in or interaction during INOFO events such as General assemblies, leadership roles such as convenors, country contact persons, etc. This may have left out important stakeholders.

CHAPTER THREE

3.0 Results and discussions.

The results of the findings from the survey data analysis are presented in this chapter. The content also includes the related discussions in the process of analyzing the level of organisation of the organic sector in Africa, identification of key stakeholders and suggestions on how to strengthen the organised organic agricultural sector in Africa.

3.1 Introduction

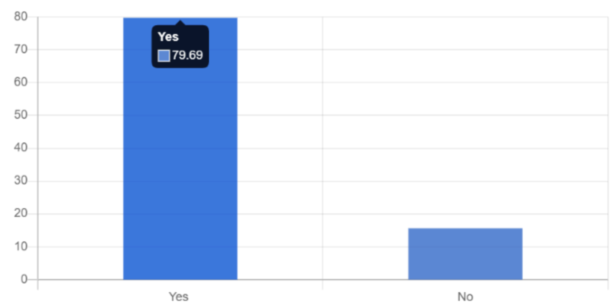
Generally, the survey received an enormously positive response all across Africa. A total of 111 respondents submitted their survey response forms; 64 of these responded to the survey tool that targeted OFOs while 47 were respondents under the non-OFO category (Other key Stakeholders).

3.2 Characteristics of OFO respondents.

The different characteristics of OFOs that participated in the study are presented in this sub-section below:

3.2.1 Categories of OFOs

Figure 1: Percentage of OFO respondents.

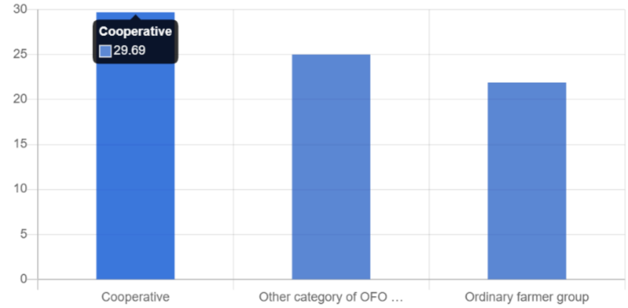


61 out of 64 respondents answered this question. (3 were without data).

As illustrated in figure 1 above, 61 out of the 64 respondents answered the question: *Are you an Organic Farmers' Organization (OFO)/group at the grassroot level in Africa?* in the OFO tool and *51 (80%)* of them actually declared their categorization as OFOs as they responded affirmatively (with a *Yes*), while *10 (16%)* respondents dissented (with a *No*), *3 (4%) respondents had no data*. Of these three, two respondents left general comments desirous of converting into organic farmers in the near future as presented in the callout below:

- ❖ *Am converting to organic farming, but have friends who are organic farmers.*
- ❖ *I am aspiring to become one such Organic Avocado Pears grower and join one Organic Farmers' Organization/Cooperative in the near future.*

Figure 2:Percentage of OFO Categories.



49 out of 64 respondents answered this question. (15 were without data)

As illustrated in figure 2 above, out of the 49 OFOs, close to 30% were Organic Farmer Cooperatives, 22% were from Ordinary Farmer groups and 25% of respondents indicated that they belong Other Categories, which included Associations or Networks, a Non-Government Organization operating at National level and an individual enterprise.

3.2.2 Size of OFOs/OFO membership.

According to the study findings, it is interesting to note that the size of OFOs in terms of number of members vary greatly for all the three categories described in figure 2 above ranging from as few as only 6 members to as many as 16,102. With an almost even mix and regardless of which sub-region they come from in Africa, all the categories of OFOs (Cooperatives, Ordinary groups and Others) had representations among those with less than 61 members ($6 \leq 61$) – 15 OFOs; with over 105 but less than 400 members ($105 \leq 400$) – 06 OFOs; 04 OFOs had more than 500 but less than 900 members ($500 \leq 900$); 05 OFOs had 1500 or more but less than 3700 members ($1500 \leq 3700$) while one ordinary group had 6000 members and one cooperative reported to have 16,102 members *(This data set was from 35 respondents; the OFO own by an individual's enterprise was not considered in this data set).*

3.2.3 OFO membership Composition.

The study also revealed that generally, these groups are constituted by more Females (54%) than males (45%) with youth in the age category of 13-35 years catering for less than ¼ of the members; adults in the age range of 36 -64 years constituting more than ½ of their respective OFO membership while the elderly over 65years were also less than ¼ of the members at OFO group level. It was observed that for groups with particular focus on youth, they had far much more youth than other age groups, with no elderlies, while there were also groups exclusive to women alone. There were groups of considerable numbers with men outweighing women in the membership composition.

3.2.4 Legal status and years of establishment.

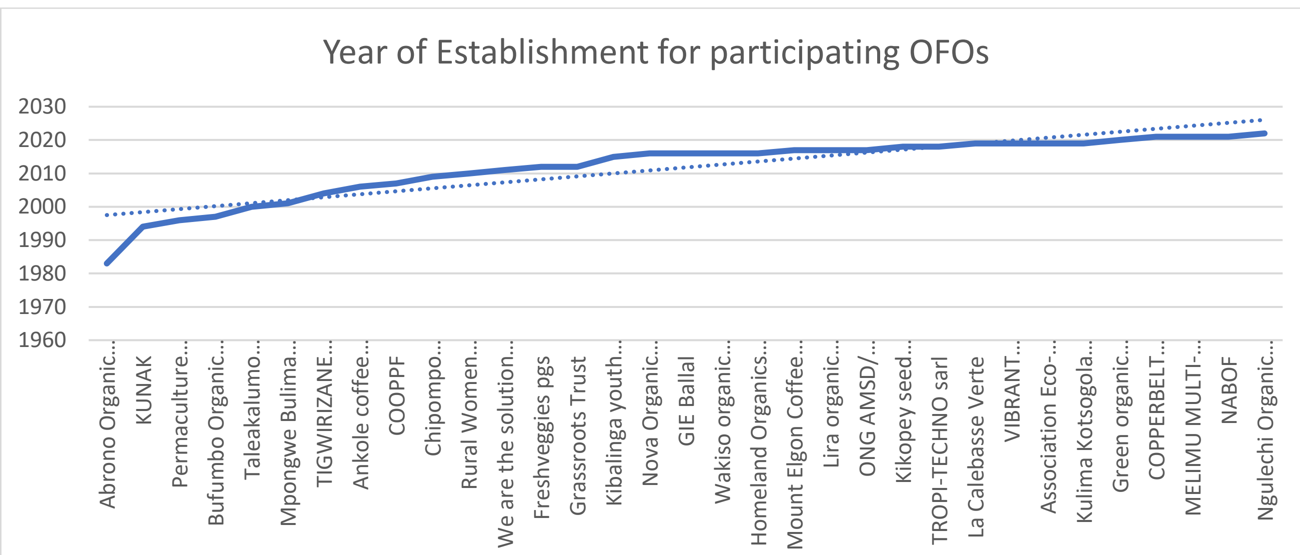
a) Legal status of OFOs

Further to this, the study explored the legal status of the OFOs, respondents were asked whether or not their organizations were registered with their respective governments. 94% of the respondents (*representing 33 out of the 35 OFOs who answered this question*) mentioned that they were duly registered, 6% (*representing 2 OFOs; one from Mali and one from Ghana*) mentioned that they were not registered. This is positive feedback which positions INOFO and other key partners to collaborate well with local authorities knowing that the OFOs in which the targeted organic farmers associate are recognized by these authorities. However, the study did not further assess the existing internal governance structures to assess the respective capacities of the responding OFOs.

b) Years of establishment

As shown in figure 3 below, the participating OFOs were established between 1983 – 2022 with a linear progression. The earliest OFOs, according to the study results, have existed for close to 40 years while the latest entrants are less than a year. It is therefore forecasted that newer OFOs, with specific needs relating to organic agriculture may be formed in the future in accordance with the trend regardless of the sub-regions in Africa.

Figure 3:Years of Establishment for participating OFOs.



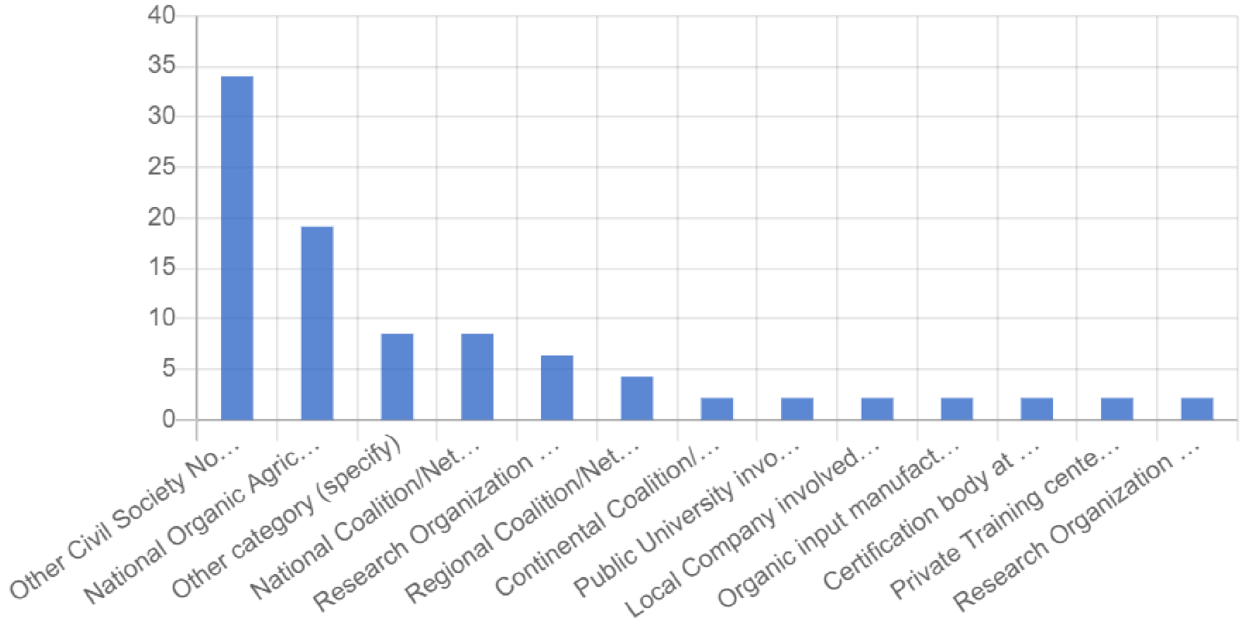
3.3 Characteristics of Non-OFO respondents:

In a similar way, the study explored the different characteristics of the non-OFO respondents as follows:

3.3.1 Categories of non-OFO respondents.

Under the non-OFO stakeholder category, 47 respondents participated in the survey, 45 of whom consented to proceed with the survey and only 2 declined *(47 out of 47 respondents answered this question (0 were without data).*

Figure 4:Percentage representation of non-OFO stakeholder categories of respondents.



As shown in figure 4 above, out of the 45 respondents, the majority *(16 organizations representing 34%)* were *Other Civil Society or Non-Government Organization promoting Organic and/or ecological agriculture at country level*; followed by *National Organic Agriculture Movements (NOAMs) (09 NOAMs representing 19%); 04 National Coalition/Network/Alliance/Forum for Non- state actors promoting Organic and/or ecological agriculture (8.5%); 03 Research Organization at Regional/African Level involved in Organic/Ecological Agriculture Research (6.4%); 02 Regional Coalition/Network/Alliance/Forum for Non- state actors promoting Organic and/or ecological agriculture in Africa (4.3%).*

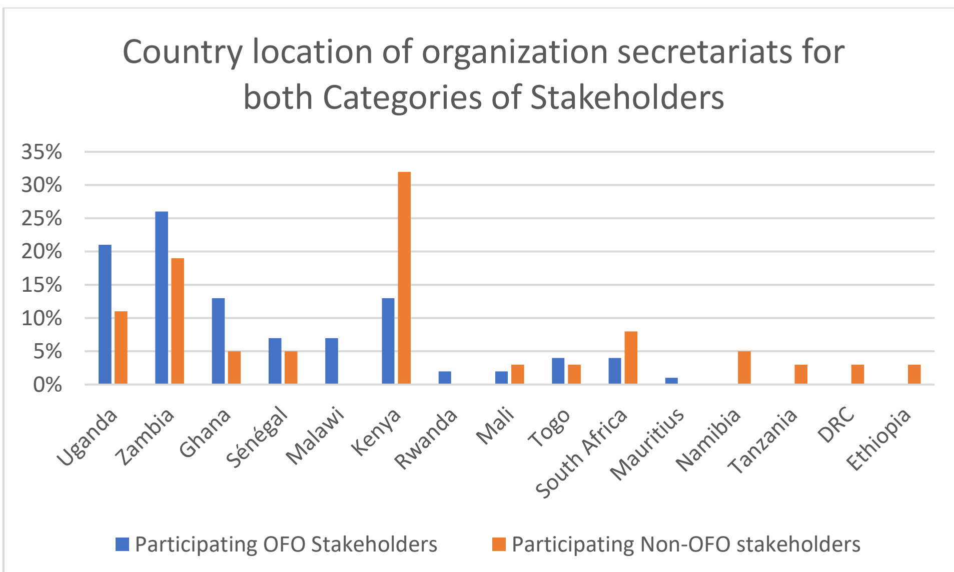
Other non-OFO categories that participated in the survey adding up to 7 organizations, representing a total of 15%, with one representative per category were as follows: *one Continental Coalition/Network/Alliance/Forum for Non- state actors promoting Organic and/or ecological agriculture in Africa, one respondent from a Public University involved in Organic agriculture training and research; one Local Company involved in production and trade of Organic produce at national level, one company dealing in Organic inputs (manufacturer and/Supplier); a Certification body operating at international level; a Private Training center/institution involved in Organic agriculture training and research and one National Research Organization involved in Organic/Ecological Agriculture Research.*

04 respondents representing 8.5% preferred to categorize their organizations under *Others,* which they specified as follows: *An Individual farmer; a Chiefdom Investment & Development Foundation; Non-Governmental organization that is working with local farmers to encourage adoption of organic farming, and promote local farmers in adopting sustainable farming and a Regional Farmers; Organisation.* (Details of these organizations were annexed to this report).

3.4 Country location for the OA stakeholder respondents.

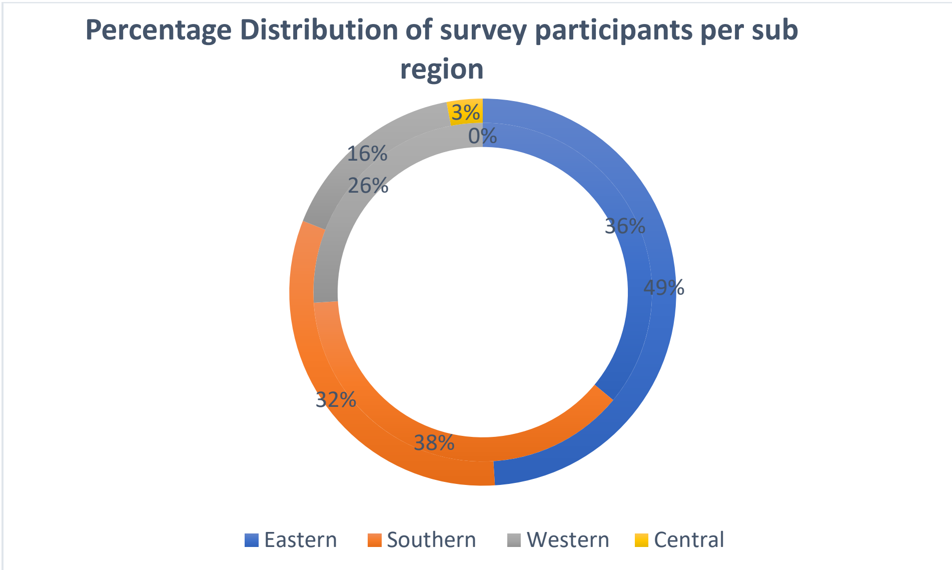
The participants of the survey were from a total of 15 countries across Africa. These included 47 OFO participants from 11countries and 37 non-OFO stakeholders from 13 countries (see details in report annex). As illustrated in figure 5 that follows, Zambia had the highest number of participants (07 OFOs, 12 non-OFOs), followed by Kenya (06) OFOs, 12 non-OFOs), then Uganda (10 OFOs, 04 non-OFOs), followed by Ghana (06 OFOs, 02 non-OFOs).

Figure 5: Country Location for both OFO and non-OFO respondents by percentage.



The study further assessed the distribution of the survey participants per sub region in Africa as shown in figure 6 below:

Figure 6: Percentage distribution of survey participants per sub region in Africa.



The inner ring represents the OFO stakeholders while the outer ring represents the non-OFO stakeholders. For Both Categories of respondents, the Eastern African sub-region attracted most respondents *(from 05 countries: Uganda, Kenya, Rwanda, Tanzania and Ethiopia)*, with close to half of the total number of respondents, followed by the Southern Sub region *(also from 05 countries: Zambia, Malawi, South Africa, Mauritius and Namibia)* which catered for over one third of the respondents. In total, the ESA[1] region attracted more than ¾ of the respondents while the WCA[2] region had less than ¼ of the respondents the majority of which were from West Africa (*with 04 participating countries of Ghana, Senegal, Mali and Togo)* and only one from Central Africa in *Democratic Republic of Congo (DRC).* Although they were targeted no respondents from Northern Africa participated in the survey. The non-OFO respondents also included 04 international organizations with operational bases in Africa. These included *a UK-based organic input dealer in Zambia; another UK-based Organization in Kenya, an Italian Organization based in Kenya and Germany Organic Certification Body with Operations in Uganda.*

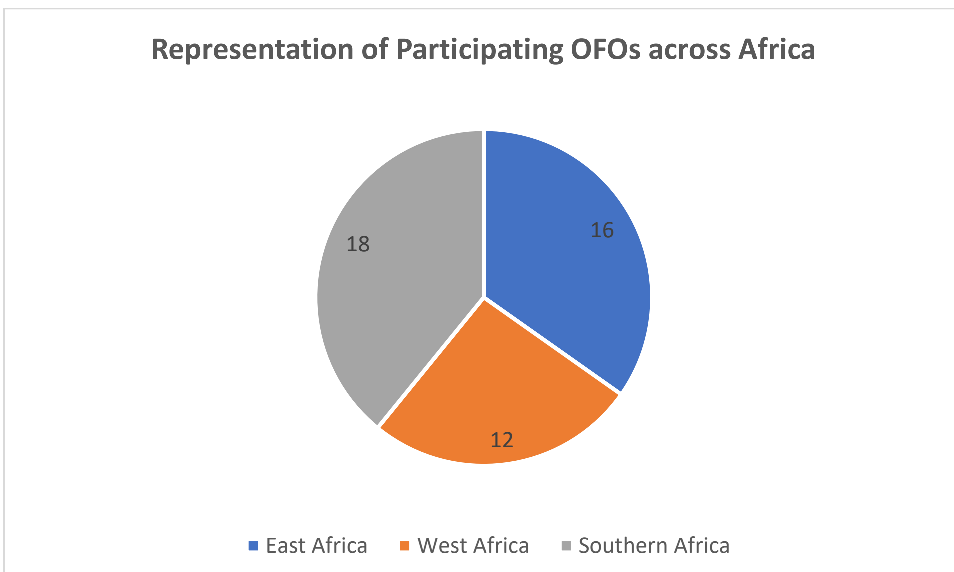
[1] ESA region refers to the Eastern and Southern African region as categorized by IFAD. It covers 21countries.
[2] WCA region refers to the Western and Central African region as categorized by IFAD. It covers 24 countries.

Table 1:Number of participating OFOs per country.

OFO Country of Operation	*Frequency*	*Percentage*
Uganda	10	21%
Zambia	12	26%
Ghana	6	13%
Sénégal	3	7%
Malawi	3	7%
Kenya	6	13%
Rwanda	1	2%
Mali	1	2%
Togo	2	4%
South Africa	2	4%
Mauritius	1	1%
Total	**47**	100%

As shown in Table 1 *(above)* and Figure 7 (*below*), the 47 participating OFOs were fairly distributed from West, East and Southern Africa.

Figure 7:Representation of Participating OFOs across Africa.



The distribution of the survey participants is directly proportional to the active participation of OFOs and direct convenorship within the INOFO leadership structure, considering both the current and previous councils. Countries with convenor representatives were easier to mobilize for the survey while those with no representation were harder to reach out.

3.5 Characteristics of Other Key stakeholders with broader focus in socio-economic development in Africa.

As part of the study, the survey mainly focused on stakeholders directly involved in the OA sector while supplementary information from a desk review was also collected and analyzed to have a wider understanding of all stakeholders including those with broader and multi-sectoral focus outside the OA sector but within the Agricultural domain and have influence on the OA sector in Africa.

These include the following categories: Other farmer federations and coalitions outside the organic sector; Institutions of learning; Research Institutions; State actors at national and regional levels; International funding agencies, IFOAM, AUC, UN agencies among others as were summarily profiled in an earlier synopsis of the OA landscape in Africa (INOFO, 2022).

Other Key stakeholders are those that were mentioned by the OFO respondents and others by the non-OFO respondents as organizations/fora/networks/coalitions/Research institutions/Learning Institutions/Government bodies or departments, etc., that they collaborate with.

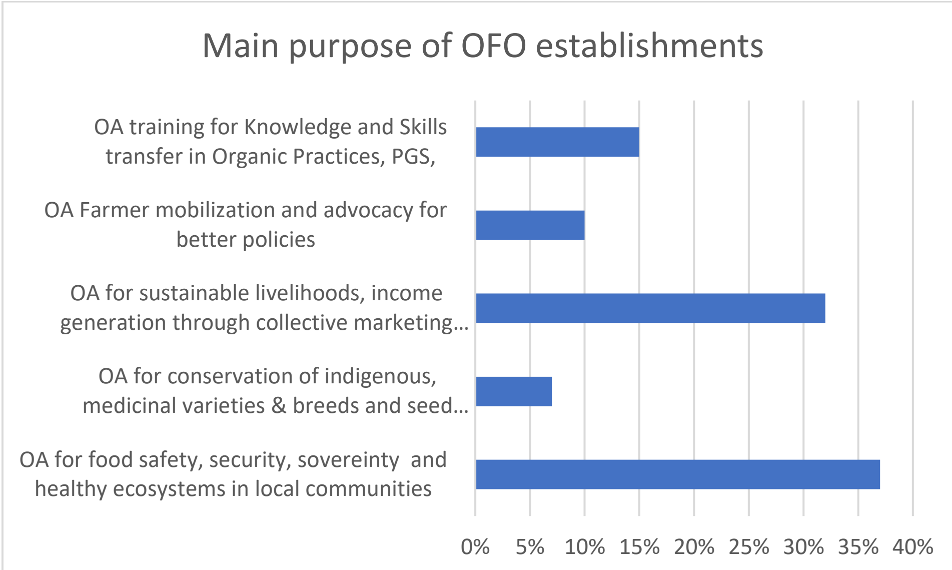
The broad categories as described in the previous two paragraphs have both specific and overarching roles in the Agricultural sector as a whole, rural economic development, gender empowerment and more specifically some are sources of funding for development interventions. INOFO through the convenors, elected representatives in different platforms already has established strategic working relationships with some of these key stakeholders and given their broad roles should be engaged in a case-to-case situation.

3.6 The main purposes of and priority areas of focus for stakeholders in the OA sector in Africa.

3.6.1 Main purposes of OFOs.

To understand what purposes, the stakeholders in the OA sector do exist to serve, the participating OFOs were asked to share the main purpose of their respective organizations in an open-ended question: The information provided (*by 48 of the 64 respondents*) was further grouped in five (05) major categories (*16 were out of data)*. The results of the secondary analysis were as follows in figure 8 below:

Figure 8: Main purpose of OFO establishments.



Most responses repetitively pointed out that the OFOs' establishment mainly focused on ***Promotion and Practicing Organic Agriculture (OA),*** *such as permaculture for food security among their members, ensuring safe food production in a healthy environment or eco-system for better health at household and community levels* – catering for *37%* of the (multiple) responses.

The next most common purpose that was reflected in the responses was that of ***ensuring sustainable livelihoods, income generation through collective production, certification and marketing with fair prices and conditions for the producers,*** at *32%*. This was echoed by respondents from cooperatives with specific commodity produce such as Avocado grown by producers in Zambia, Specialty Coffee for export from the slopes of Mount Elgon in Uganda, but also from ordinary OFOs with smaller membership groups dealing in vegetable crops and other local foods and processed products found in the different regions of Africa that participated in the survey.

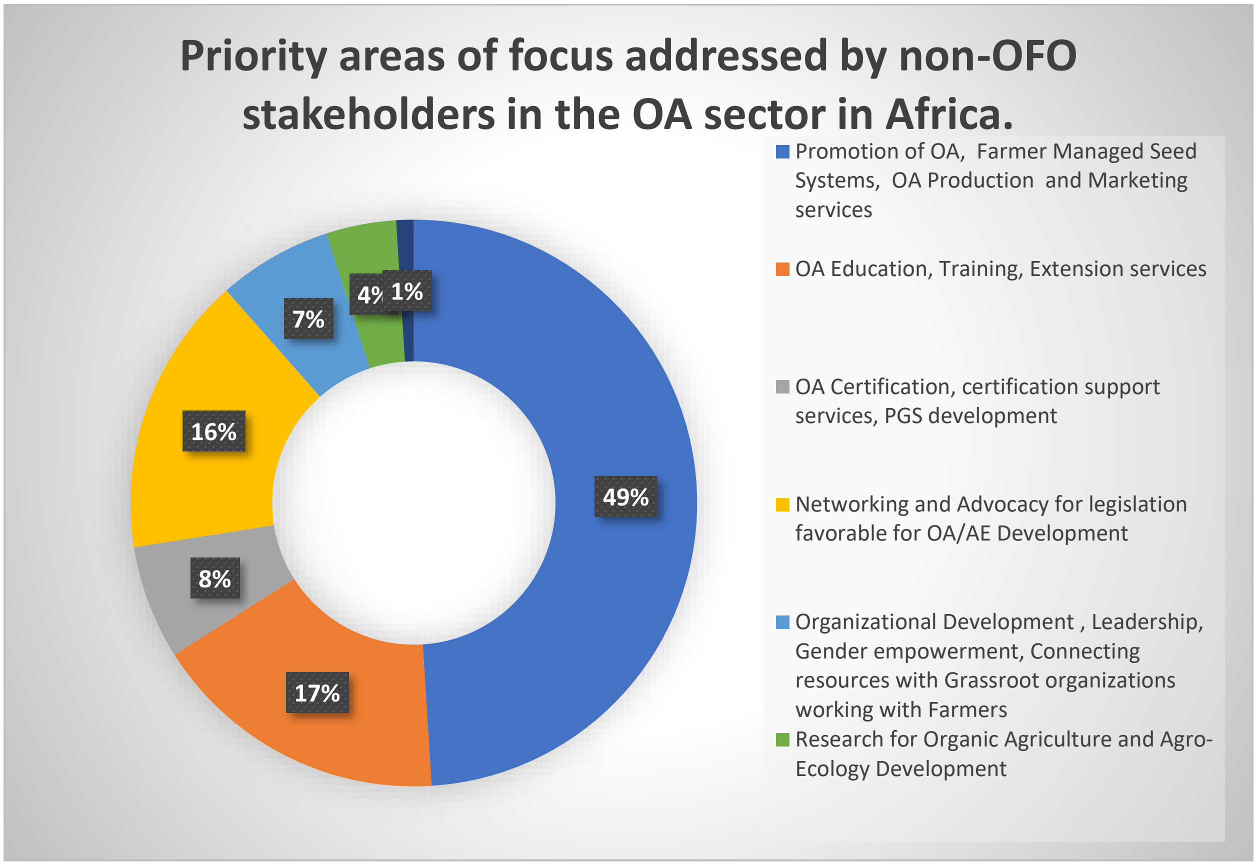
Other main purposes of OFO establishments of considerable significance in this study were: ***OA training for knowledge and skills transfer in Organic Practices, Participatory Guarantee Systems*** at *15%*; ***Farmer mobilization and advocacy for better policies*** at *10%* and ***Promotion of OA for conservation of Indigenous, medicinal varieties through practices such as seed saving*** at *7%*.

3.6.2 Priority areas of focus for non-OFO stakeholders.

Correspondingly, the non-OFO actors who participated in the survey were asked, in an open-ended text question*;* ***Which priority areas of focus does your organization address in the organic /ecological agriculture sector in your area of operation in Africa?*** *41 out of 47 respondents answered this question (6 were without data).*

Similar and/or related responses were further combined into seven (07) categories as illustrated in figure 9 below:

Figure 9: Priority areas of focus addressed by Other Key Stakeholders in the OA sector in Africa.



In total 77 counts of priority areas emerged out of the received survey data. It should be noted that there were intersections and overlaps in these responses. The frequencies and percentages were generated to quantify the data in order to easily assess the weights of the priority areas of the participating organizations.

The results indicated a majority 49% (38 counts) focus on ***Promotion of OA for Food & Nutritional security, OA production and marketing services.*** The responses that were merged into this first category included; *Development of organic value chain, production and market access, Hass avocado organic growing, Collective marketing of Organic produce and promotion of organic farming, Production and market facilitation for organic livestock and crops, Agroecological intensification, Promotion of Biodiversity, Permaculture, Agroforestry Agro Ecology promotion, Food and Nutrition Security, Climate change adaptation and resilience, Seed Saving, Environmental Conservation, Organic Marketing and Profitable Trade, Ecological restoration, Production of Organic Avocado/Garlic/ Turmeric, promoting OA production, Farm Productivity, Food, Nutrition and Health, Food and Seed Sovereignty, Market Access and Value Chain Development, Integrated Soil Fertility Management, Food Safety, Coffee production, Sustainable Food Systems, Adaptation to climatic hazards, Organic production development* *across the entire value chain, Agroecosystems analysis and optimization and Marketing of safe food.*

The respondents included stakeholders such as NOAMS like NOGAMU, TOAM, OPPAZ and Other Civil Society Organizations working as National or regional coalitions or Networks such as ACSA, PELUM among others.

The next important area of interest for stakeholders involved in OA development in Africa according the survey findings is ***Provision of OA Education, Training and Extension services*** at *17% (13 counts)*. These included NOAMs, Other CSOs (Coalitions/Networks/Alliances), NGOs but also Training Institutions such as Training centers and University Faculties. The merged responses included; *Training in Sustainable production & Resilience in the face of climate change, Smallholder production methods, Expansion of PGS, Providing Extension Services to farmers, educating farmers about affordable ways of practicing organic farming, Training smallholder farming Communities in agroecology practices, Training New and Incumbent Farmers in Organic Farming.*

Networking and Advocacy for legislations that favor OA/AE[3] development, Seed policy: Farmer-managed seed systems, such as international treaties, laws, policies, ordinances and by-laws at the different levels of governance emerged third (*at 16%, with 12 counts*) as presented by the same organizations featuring in the first and second priority areas other than the Institutions of Learning/Academia. The submissions included; *Engaging with stakeholders in the sector, Advocacy campaigns, Women and youth involvement in the agroecology movement, women empowerment campaigns, Lobbying for land rights, Health and Social Protection Campaigns, OA Sector Development Advocacy, Promotion of agroecology policy framework, Seed Saving and access to indigenous seed Varieties.*

Other priority areas of significant importance according to the study results were; ***Offering OA certification services*** (Certification Bodies), ***Certification support services*** (NOAMs) ***and PGS Development*** (NOAMs, other CSOs at *8%* [*Certification support services building, Certification and labeling with local organic PGS labels, Promotion of Organic Standards and Certification, Participatory Guarantee System(PGS) Development, Offering Organic Certification]*, followed by ***Organizational Development (OD***) *with gender (women and youth empowerment) considerations , Leadership, Gender empowerment, Connecting resources with Grassroot organizations working with Farmers* at *7%*, ***Research for Organic Agriculture and Agro-Ecology Development*** at *4%* (NOAMs, Other CSOs, Training centers, Universities and Research Organizations) and ***OA input suppliers****[for safe Crop Health, Growth and increased Yield]* at *1%*.

In essence, the listed priority areas as presented in the results above represent the value propositions of the organizations that participated in the study. A value proposition is simply a description of the value or solution to a problem, an organisation promises to deliver. When

[3] Responses from the survey participants revealed that Organic Agriculture (OA) and Agro-Ecology (AE) were concurrently being promoted by most of the stakeholders since they share several principles and in many situations are promoted or practiced by the same entities as a sub-sector in Agriculture in Africa.

compared with the main purposes of OFO establishments as earlier presented in figure 8 above, these merge well with the Priority areas of focus enumerated by the Other (non-OFO) key stakeholders across Africa, where the first four highest ranking merged with the OFOs' main purposes corresponding directly (with overlaps) to the Four highest priority area for the non-OFOs, although these were stated differently by the different respondent categories.

This observation is a significant benefit to the study in an attempt to define the key value propositions of the key stakeholders (including OFOs and non-OFO actors) in their contributions to Strengthening the organized Organic Agriculture and Agro-Ecological Sub Sector(s) of Agriculture in Africa as illustrated in figure 10 below:

Figure 10: Observed Value Propositions for Key Stakeholders involved in OA/AE Development in Africa.

Appreciating the purposes of and the priority areas of focus for the different organizations in both OFO and non-OFO categories respectively gives direction and shall be crucial in the designing of future programs aimed at contributing to the achievement of these desired outcomes which shall ultimately lead to the attainment of the expressed and perceived needs of the key stakeholders in the OA sector in Africa.

3.6.3 The main purposes of other key stakeholders assessed under the desk review

As earlier stated in the introduction of 3.6 (paragraph 2) above [*also refer to annex 5*], these stakeholders including International Financing institutions such as French Development Agency (AFD), African Development Bank (AfDB), the African Union (AU), the European Union (EU), Swiss Agency for Development and Cooperation (SDC), Swedish International Development Agency (SIDA), Swedish Society for Nature and Conservation (SSNC), among others respond to strategic development priorities[4] within the African region through different approaches. On one major front, they hold negotiations with intergovernmental bodies and the member state actors within the Regional Economic Communities (RECs), particularly the African Union Commission (AUC), New Partnership for African Development (NEPAD), The Economic Community of West African States (ECOWAS), Economic Community of Central African States (ECCAS), the East African Community (EAC), the Intergovernmental Authority on Development (IGAD), the Common Market for Eastern and Southern Africa (COMESA) and SADC – Southern African Development Community. They also engage through international bodies of the UN including IFAD, FAO and economic for a such as the ITC among others. For instance, Countries may make contributions through Unilateral Trust Fund (UTF) agreements established between the government of a given country and the UN body such FAO or IFAD. The UTF is a funding modality financed entirely by a government for programmes or projects to be implemented in the country, typically originating from loans and/or grants by international financial institutions (IFIs) or by development partners through budget support (FAO, 2023).

More recently, partnership windows have opened up for direct engagement with Farmer Organizations, particularly as a result of the decentralized FAFO process to regional levels within IFAD. A case in point is "The Support to Farmers 'Organizations in Africa Programme (SFOAP).[5]

Another recent development at FAO on the regional scene at the African continental level is that two regional partnership agreements were signed, with the Pan-African Farmers Organization (PAFO) for policy advocacy and capacity development of smallholder producers/family farmers and their organizations, and with Agricycle Global Inc. for capacity development of youth in

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[4] The current four regional thematic priorities for FAO in Africa are: 1. Sustainable agrifood production systems; 2. Efficient & Equitable food and nutritional systems; 3. Climate action & Sustainable natural resource management; and 4. Building resilience, ending poverty.

[5] The SFOAP – a multi-donor continental programme whose overall objective is to improve livelihoods and food security situation of African smallholder farmers and rural producers through their FOs which included: EAFF, PAFO, PROPAC, ROPPA, SACAU & UMAGRI (2013 – 2018).

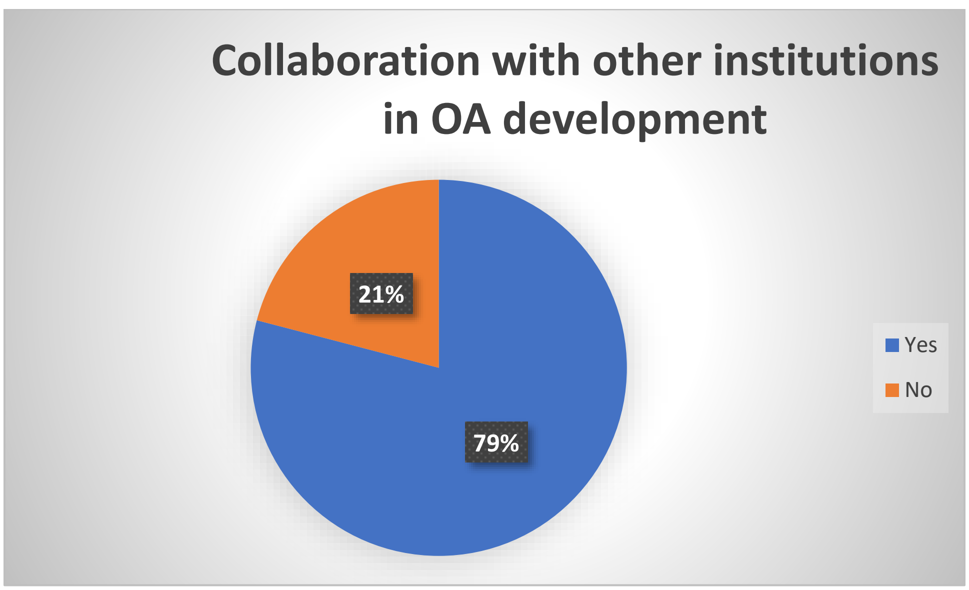
value-addition and market access. Groundwork was also laid for the signing in early 2023 of a Memorandum of Understanding with the Africa Risk Capacity (ARC) Group to promote women's inclusion in climate action (FAO, 2023).

The five FOs within their regional networks, namely: EAFF, PROPAC, ROPPA, SACAU and UMAGRI which operate all across Africa are members of the Pan African Farmers' Organization (PAFO)[6]. The overarching objective of PAFO is: to effectively engage members in advocacy with policy-makers, and technical and financial partners and promote their participation in the formulation and implementation of the development policies and programs that affect agriculture and rural development in Africa (PAFO, 2020). All these members, including WFF are represented on the Regional Steering Committees of FAFO and INOFO at the regional levels, directly engages within them as an active member of the steering committees in ESA and WCA regions.

3.7 Collaborations and institutional landscape in the OA sector in Africa.

To understand how key stakeholders within the organic sector are organized and relate with each other, in a closed-ended question, the non-OFO respondents were asked if they were members of any movement/forum/coalition/alliance/network, or collaborate with a public or private institution in the development of Organic Agriculture or Agroecology at national, sub-regional, regional or international levels (*43 out of 47 respondents answered this question (4 were without data*).

Figure 11: Percentage of stakeholders that Collaborate with other institutions in OA development in Africa.



[6] The five networks are: Eastern Africa Farmers Federation (EAFF), Plateforme Régionale des Organisations Paysannes d'Afrique Centrale (PROPAC), Réseau des organisations paysannes et de producteurs de l'Afrique de l'Ouest (ROPPA), Southern African Confederation of Agricultural Unions (SACAU), Union Maghrébine et Nord-Africaine des Agriculteurs (UMNAGRI).

The results clearly show that the majority of the stakeholders (*79%*) have existing collaborations through membership to established movements/fora/coalitions/alliances/networks, or closely collaborate with public or private institutions in the work of OA development.

The respondents further listed the institutions with which they collaborate. Annex 5 shows a summary of the interactions of the grouped stakeholders' categories in the different sub regions of Africa.

The National Organic Agriculture Movements (NOAMs) which are the umbrella organizations mandated with the coordination of all other sector actors in the promotion of OA were mentioned multiple times by the different OFOs in the different sub-regions of Africa. These particularly included: NOGAMU from Uganda, ROAM from Rwanda, OPPAZ from Zambia, FENAB from Senegal and KOAN from Kenya. IFOAM OI - International Federation of Organic Agriculture Movements was also listed by multiple response.

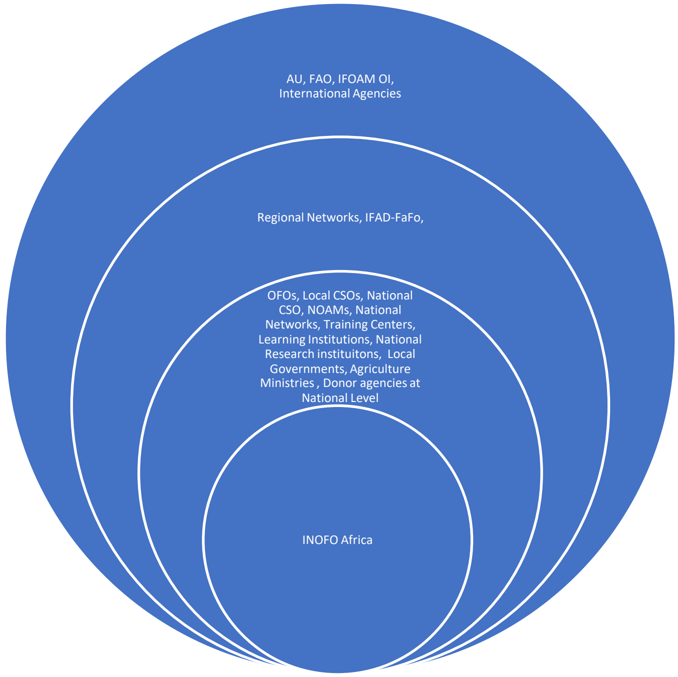
Regional organization such WAS, PCAO from Ghana and in CIKOD (02) Ghana, WWOOF (1), IFOAM 03 SA, OPPAZ 07 Zambia; Plan International Zambia, Ministry of Agriculture Zambia, West Africa Competitiveness Program[7]

Organizations operating at national level such as Racine, 3AP in Senegal, Seed Savers Network in Kenya, Abofap in Ghana and many more.

Other stakeholders covering broader development sectors such as GIZ/BMZ, state actors including Agriculture ministries, local governments and departments were also listed by OFOs among key partners with whom they collaborate – *See details in annex 5*.

[7] The West Africa Competitiveness Support Program (WACOMP) in Senegal is implemented by the International Trade Centre (ITC), in partnership with the Ministry of Trade and Small and Medium Enterprises of Senegal. WACOMP Senegal aims to support and strengthen the competitiveness of MSMEs in regional and international markets**.**

Figure 12: An illustration of the stakeholders' relationships in the OA sector in Africa.

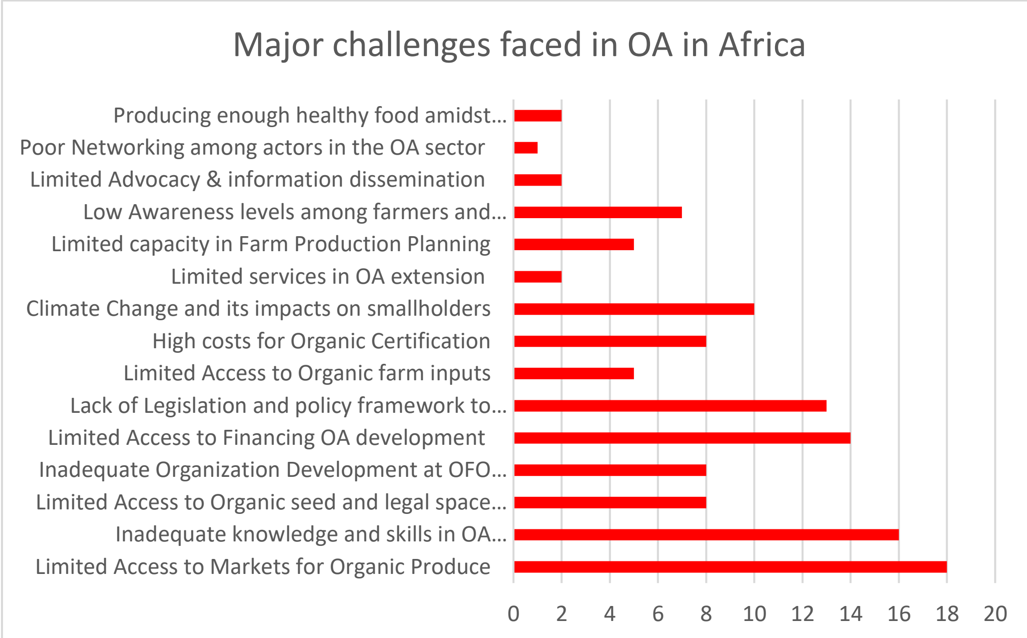


3.8 Major challenges faced in the OA sector in Africa.

To further understand the dynamics within the organic sector in the region, as one of the key research questions, OFO respondents were asked in an open-ended question, to describe, in their own opinions what major challenges are experienced in the OA sector at country level or on the African continent as whole.

These were open-ended text responses. *50 out of the 64 OFO respondents answered this question and 14 were without data.* A total of *119 multiple responses* pointing out the challenges faced in the Organic Agricultural Sector in Africa, as perceived by OFOs were mentioned. These were clustered and analyzed as presented in figure 13 below:

Figure 13: Major challenges faced in the development of the OA sector in Africa.



1. **Limited access to markets for organic produce:**

Limited access to markets for organic produce was ranked as the top most challenge at *15% (18 responses out of the 119 total frequency of the challenges presented)* according to the findings of the study. The challenge was associated with unfair markets that demotivate organic farmers/producers. These markets are characterized by low prices for OA products by buyers targeting the highly celebrated export markets, but on the local markets as well. Organic farmers seek for fair pricing mechanisms and marketing channels.

2. **Inadequate knowledge and skills in OA agronomy; in Soil fertility management, Pest & Disease Management:**

The second challenge continuously mentioned by OFO participants in the study was inadequate knowledge and skills in Organic Agriculture agronomy. Whereas lack of knowledge and skills in general agriculture practices is still a big problem in Africa.

For instance, in a recent article by African Plant Nutrition Institute (APNI) in Kenya, it was stated that stakeholders have often pointed out that breakthrough agricultural technologies rarely get to the farm in sub-Saharan Africa. One of the main reasons is that the ratio of extension workers to farmers is very high. The report further cited that the current ratio is 1 extension staff for every 1500 farmers while the recommended ratio is 1:400. It was further expressed that in fact this ratio is widening due to the lack of hiring of new extension workers by governments, and that a good number of those already hired have either retired or are likely to retire soon (APNI, 2022).

The situation is equally or even more challenging in the Organic Agricultural sector since no mainstreaming into the national public extension services has been considered as it was pointed out in the study with 13% (16/119) of responses to this question. The most challenging factors that were noted included lack of enough know-how to maintain soil fertility, pest and diseasing management following Organic Agriculture principles, which culminates into low quality produce. It was also repeatedly stated that OA practices in Africa are still surrounded with several misconceptions and considered to be laborious (involving much physical hard work).

3. **Limited Access to Financing OA development:**

In the third position was limited access to financing OA development at *11.8%* and a total frequency of *14 counts.* It cuts across all the other mentioned challenges since all interventions to a great extent do require funding. The respondents in the OFO category specifically cited lack of funding towards training programmes in skills development, limited access to and management of appropriate technologies such as cold chain equipment due to low access to financing of such capital investments, lack of infrastructure which include handling and processing facilities for organic products to meet the market requirement standards and quality procedures. It was also mentioned that there isn't enough commitment in form of funding from both public (governments) and other non-state actors to establish inclusive OA development programmes to tackle key practical limitations.

According to a report from OECD/FAO 2016, motivated by the need for a vibrant and sustainable agricultural sector, a number of policy initiatives have been integral to the sector's development over the past decade. CAADP was prioritized within the 2003 Maputo Declaration on Agriculture and Food Security through commitments to allocate at least 10% of national budgetary expenditure towards its implementation and aimed to achieve a 6% annual growth of the agricultural sector. Less than 20% of the countries have achieved their commitment on agricultural spending. More recently, these commitments were reaffirmed in the Malabo declaration on accelerated agricultural growth, which pledged to end hunger in Africa by 2025. These commitments are still far out of reach for most countries in Sub-Saharan Africa for their general Agriculture, whilst most of them are yet to even incorporate OA/AE in their National Plans.

4. Lack of Legislation and policy framework to safeguard OA operation space:

10.9% (13 counts) of the responses pointed at lack of or limited government support in form of commitment through conducive legislation and public funding. The discriminatory and incriminating legislations on Organic Seed in the different countries in Africa was strongly emphasized. Others stated that the lack of formal recognition of OA production systems, poor coordination between government structures and the private sector coupled with unfavorable external policies, such as the EU policies, which do not match with local production context and are greatly hampering the sector in Africa.

5 – 8. Other mentioned challenges in the OA sector in Africa:

The other challenges that were highlighted in the study include*:* **Climate Change and its impacts on smallholders** *(8.4%)* - the responses specifically noted that there is lack of water for irrigation and limited access to, and financing for the acquisition of the necessary equipment, increasingly recurrent and prolonged droughts, low adaptation and socio- mechanisms in place to respond to climate changes so as to minimize its negative effects which include socio- economic hazards such as changes in rainfall patterns, increased temperatures, and other climate-related events that do negatively impact on organic farming; **Limited Access to Organic seed and to sell Organic Seed** (citing the GMO seeds as a major threat, dwindling access to local seed by peasant farmers), **Inadequate Organization Development (OD) at OFO Level, sectoral level** - OD in Business orientated management, Management of relations between Farmers or Farmer groups and Business Operators contracts, Lack of Market Information Systems, Non-existence NOAM at country level were pointed out missing links at different levels (OFOs, National, regional and continental) towards the organized organic agricultural sector in Africa in specific situations in the different countries that participated in the survey; and **High costs for Organic Certification,** which highly influences limited access to services by organic farmers or producer groups. The above listed challenges all tied in the 6^{th} position in terms of significance each with 8 counts.

Low Awareness levels among farmers and Consumers on benefits of OA (5.9%, 7counts) also emerged as a significant challenge of the sector on the continent where respondents noted that it directly responsible for the Low adaptation of OA practices. Other underlying factors that were mentioned included low consumer involvement/engagement, low purchase power of OA products on local markets and high costs of organic products on the market.

Limited Access to Organic farm inputs and **Limited capacity in Farm production Planning** both had 5 counts each (rated at 4.2%). Under the former, respondents cited fake inputs, low access and availability to bio-inputs in their countries while for the later it was Seasonality of the farm produce, lack of good production and marketing calendar and the logistics involved, post-harvest losses and limited capacity to mobilize marketable volumes were the key areas noted.

Limited services in OA extension, Limited Advocacy & information dissemination (surviving under the suppressive financial muscle of the agro-chemical industry, low of advocacy for clean food) and the challenge of **Producing enough healthy food amidst shrinking agricultural space** (with limited knowledge about agro-ecological practices that are effective and can be easily adapted to in the current context)**.** All three had 2 counts each (rated at 1.7%) while **Poor Networking among actors in the OA sector** with 1 score was rated at 0.8% of the total submissions that were made in response to this question.

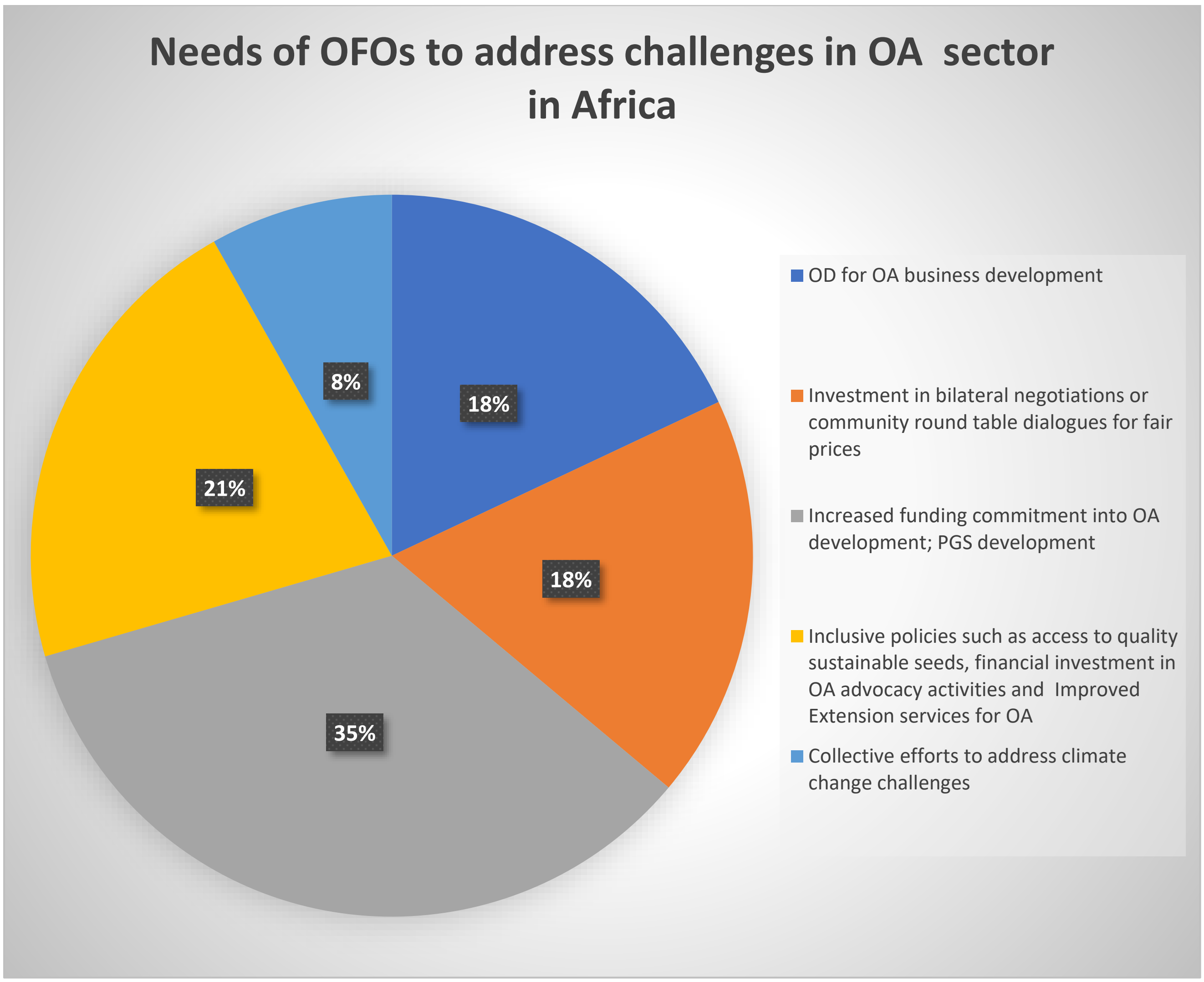
The results as presented and discussed above clearly indicate the magnitude and diversity of challenges currently experienced by the Organic Agriculture sector at the different levels, from different countries as perceived by the OFO respondents in the study.

It should be noted that some countries do not have NOAMs, as it was stated as one of the respondents in the study who cited it as a big challenge.

3.9 The needs of OFOs to address the challenges they face in the OA sector in Africa.

After establishing what challenges do exist in the OA sector as perceived by OFOs, the survey further investigated what needs OFOs have in order to address these challenges. Similar to the previous question on challenges, the OFO respondents were allowed to express their needs in an open-ended text question in sequence. *47 out of 64 respondents answered this question (17 were without data).* The (multiple) responses made were as well subjected to secondary analysis and categorized into five major themes as illustrated in figure 14 below:

Figure 14: Percentages of Needs of OFOs to address challenges in the OA sector in Africa.



The following responses were presented:

1. **Increased funding commitment into OA development.**

High up on the priority list of needs was the undisputable need for more funding provided to the OA sector for its progressive development. *This emerged as the top-most expressed need of OFOs with 21 counts out of the 61submissions)*. The OFO respondents pointed out that the funding should be geared towards programmes that shall support offering of technical services in OA production, processing and marketing especially the development of PGS for the promotion of local trade, facilitation widespread knowledge and skills transfer in OA all across Africa, On-farm soil and water conservation techniques suitable in OA systems focusing on farmer education and giving practical support with information repositories and tools thereof easily accessible to farmers. They further proposed ideas such as profiling and widely sharing success stories, establishment of demonstration farms to showcase sustainable ways of food production.

2. Inclusive policies such as access to quality sustainable seeds, financial investment in OA advocacy activities and Improved Extension services for OA.

The expressed needs related to this theme made a total of 13 counts (21%). In their views, OFOs emphasized the need for governments to recognize OA through the development of solid organic policies which shall facilitate the provision of logistics for better extension services in OA, promote access to quality sustainable seeds among other pertinent needs. In addition, OFOs expressed their plea for financial investment in advocacy activities including awareness raising on OA benefits which shall be the basis for influencing better policies on OA.

3. Organizational Development for OA business development; Investment in bilateral negotiations or community round table dialogues for fair prices.

a) Organizational Development for OA business development;

Support directly focusing on Organizational Development emerged as one of third most expressed OFO need (18%, 11 counts). OFOs feel, as expressed in their shared opinions that business incubation facilities focusing on organizing production among OFOs for consistency in quality and volumes bulked for supplying the existing huge market demands shall open gateways in the direction of addressing the challenges faced in OA in Africa today. In their responses, the OFOs further urged that aspects such as re-orienting production with consistence in soil health and fertility management for better yields, with the ability to establish and follow cropping calendars with production flow, capacity building related to core business such as training in farmer organization leadership, production, processing and value addition, marketing, creation of market linkages in consistence with the support for aggregation of produce to meet market demand as earlier on mentioned, capacity to plan for, handle and manage the logistics involved such as harvesting and storage equipment, transportation, and support to organic certification including exposures to negotiations in international contracts and establishment of market information system for value chain actors.

b) Investment in bilateral negotiations or community round table dialogues for fair prices.

Similarly, the above submission, the need to invest in bilateral negotiations or engagement in community round table dialogues to influence fair prices also had 11 counts, which represented 18% of the total mentioned needs. The OFOs suggested that through networking, conducting exchange visits for knowledge sharing in OA practices, and through other mechanisms, OFOs can gain the confidence and expertise to effectively participate in inclusive strategies at the different levels including dialogues that can for instance influence the review of the EU regulation on smallholder farmers in OA, which directly affects group operations involved in production for export to the EU market.

4. Collective efforts to address climate change challenges.

The need to support OFOs to address challenges related to climate change was also echoed by several OFOs contributing a total of 5 counts, which represented 8% of the total expressed needs. In their view, they mentioned that activities such as afforestation drives, promotion of agroforestry and public investment in irrigation systems among others shall be instrumental in supporting farmers involved in OA in Africa to harness its benefits.

The above expressed needs of OFOs are in line with the resolutions made during the recent Regional FAFO - IFAD meetings that were held in Africa towards the end of 2022.

For the Eastern and Southern Africa Region, discussions that were held during the 2nd ESA RFAFO meeting that was held in Dar es Salaam, Tanzania, November 2022 came to a general consensus that smallholder farmers should be cushioned against shocks such as Climate Change, since they are the most affected. It was also noted in the conclusive remarks that the small holder farmers are central to food security and the general wellbeing of the people in the region; hence, the partnerships of the Farmer Organizations and IFAD were commended for the milestones they have created towards agricultural productivity through capacitating the participating small holder farmers through their Farmer Organizations to become financially stable, empowered to transact and to have a voice in the value chains (2nd ESA RFAFO/EAFF, 2022).

Similarly, the 2nd edition of the Farmer Forum for West and Central Africa that was held in Mid November 2022 in Cote d'Ivoire, the meeting also focused on identifying solutions for improving collaboration and partnership between FOs and IFAD in West and Central Africa through implementing new projects and programs, discussing priority investment issues for Farmer Organisations and how to enhance learning through knowledge sharing and exchange within the sub region.

However, Organic Farmers have not yet benefited from the IFAD fund but are hopeful since they currently represented on both steering committees for the regional FAFOs in both the ESA and WCA regions.

3.10 Opinion on establishment of a Pan-African Network for Organic Farmers' Organizations.

The study sought the opinion of both categories of key stakeholders on whether a Pan African Network for Organic Farmers' Organizations can make a significant positive contribution in the strengthening of organized organic agriculture sector in Africa with OFOs playing a major role.

For both categories, the majority of the respondents were in agreement with the statement as presented in table 03 below:

Table 2: Stakeholders' opinion on whether a Pan African Network for Organic Farmers' Organization can make a significant positive contribution in the strengthening of the OA sector in Africa.

Stakeholders' opinion on whether a Pan African Network for Organic Farmers' Organization can make a significant positive contribution in the strengthening of the OA sector in Africa		
OFO Respondents	**Frequency**	**Percentage**
I strongly agree with the statement	42	65.62
I agree with the statement	9	14.06
Non-OFO Respondents		
I strongly agree with the statement	32	68.09
I agree with the statement	8	17.02
I'm undecided on the statement	2	4.26

Among the OFO participants [*51 out of 64 respondents answered this question, 13 were without data]*, all the 51 OFO respondents were in agreement with the statement; 66% were in strong agreement and 14% plainly agreed to the statement. None of the respondent disagreed or was undecided about having a Pan African Network with OFOs playing a center role.

Similarly, for the Non-OFO respondents *[42 out of 47 respondents answered this question, 5 were without data.]*, 68% (32 respondents) were in strong agreement; 17% (08 respondents) were in agreement while 4% (2 respondents) were undecided.

The study findings are harmonious to the a the already existing trend for INOFO both at regional and at the global scene. Since its revival in 2015 after the second General Assembly of INOFO during the Organic World Congress in Istanbul, Turkey, INOFO has since been recognized internationally in several major for a of strategic importance:

- ✓ **INOFO convenors have since 2015 participated in the UN COP meetings as Farmer Observers representing Organic producers across the globe.**

- ✓ **INOFO has participated in the IFAD FaFo meetings since 2016 and is currently a member of the Steering Committees in all the regions across the globe not only in West and Central Africa, East and Southern Africa but also Asia and at global level, secured space and augmented the voice for Organic Farmers to participate in on-going deliberations and participate in the decision-making process on the committee, closely interacting with the technical teams at IFAD the UN International Fund for Agricultural Development.**

- ✓ INOFO since 2019 has been recognized as the farmers' wing of IFOAM OI, currently with a serving elected member on the B.O.D.
- ✓ INOFO has also led the organization of the Farmers' Track in the previous African Organic Conference organized by AfrONet, that was held in November 2018 in Salle, Senegal.
- ✓ INOFO at National levels within countries including Uganda, Zambia has also had successful negotiations with the respective NOAMs to lead the Organic Farmers' wing within the umbrella organizations between 2021-2022.

This analysis also shows that the study hypothesis that "**Stakeholders in the organic sector in Africa do embrace/shall embrace/have embraced INOFO's role as the OFO-led Inter-Continental Network of Organic farmer organisations (INOFO) targeting OFOs at the grassroots through active participation and inclusion processes, ensuring that the needs and rights of local farmers are guaranteed and protected *(H=1)"*** is affirmative.

3.11 Benefits of having a Pan African Network for Organic Farmers' Organizations.

It was further investigated in the study what the perceived benefits of having a Pan African Network for Organic Farmers' Organisations are, from the perspective of the stakeholders. The same open-ended-text-response question was presented to both OFO and non-OFO stakeholders that participated in the survey. Several responses were generated from many respondents in both categories.

For each category, the self-generated responses were clustered into three major related benefits as shown in figure 15 below and the details of which are presented in table 4 that follows:

Figure 15:Benefits of having a Pan African Network for Organic Farmers' Organizations.

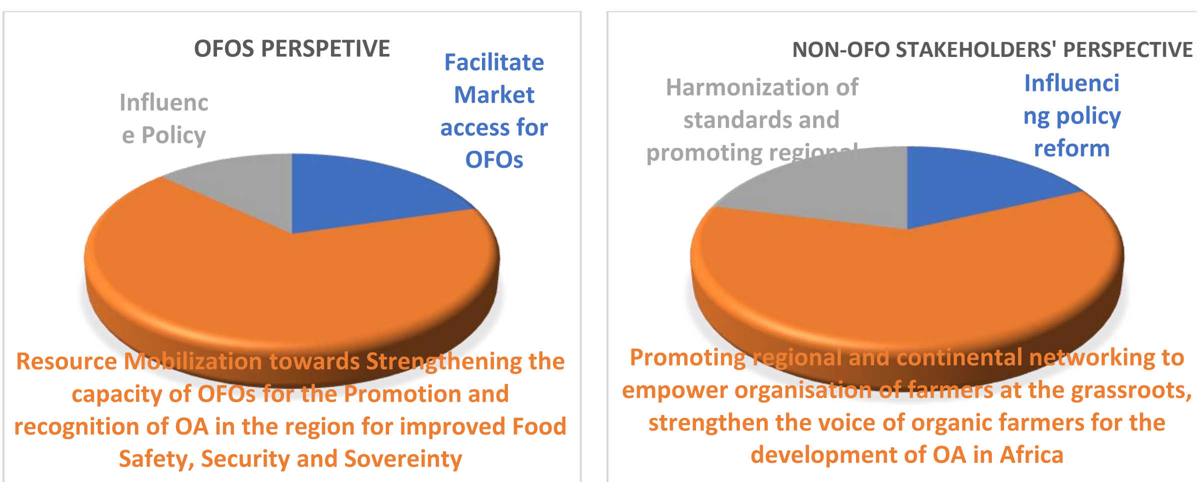


Table 3: Frequency of counts and percentage representations of the Expected benefits of having a Pan African Network of Organic Farmers' Organizations for both OFO and non-OFO respondents.

Expected benefits of a Pan African Network of Organic Farmers Organizations.	***Frequency***	***Percentage***
OFOs' Perspective		
Facilitate Market access for OFOs	19	20.40%
Resource Mobilization towards Strengthening the capacity of OFOs for the Promotion and recognition of OA in the region for improved Food Safety, Security and Sovereignty	62	66.60%
Influence Policy	12	13.00%
Total	**93**	**100.00%**
Non-OFO Stakeholders' Perspective		
Influencing policy reform	10	18%
Promoting regional and continental networking to empower organisation of farmers at the grassroots, strengthen the voice of organic farmers for the development of OA in Africa	34	61%
Harmonization of standards and promoting regional trade	12	21%
Total	**56**	**100%**

Although the responses were stated with slightly varied wording in each case, the results, as presented above, clearly indicate that from the perspective of the would-be stakeholders of the proposed Pan-African Network of Organic Farmers Organizations, three major benefits are expected. In summary, both categories of stakeholders would like to have:

1) A Pan-African Network of OFOs that has the ability to mobilize resources towards the strengthening the capacity of OFOs for the promotion and recognition of OA through regional and continental networking for improved food safety, security and sovereignty. *(This was proposed by over 60% of the respondents from each category of stakeholders)*.

2) A Pan-African Network of OFOs that engages other stakeholders towards the harmonization of organic standards, facilitate market access for OFOs to promote regional trade. *(This was proposed by over 20% of the respondents from each category of stakeholders).*

3) A Pan-African Network of OFOs that emphasizes a collective, inclusive drives towards achieving conducive policy reforms at National, Regional and Continental levels to facilitate OA development in Africa. *(This was proposed by 13 – 18% of the respondents from the two categories of stakeholders).*

The details of the expressed expected benefits for each category of respondents are presented below:

a) **Expected benefits of a Pan-African Network of Organic Farmers' Organization from the OFOs perspective:**

Up to a total of 93 assorted submissions (including multiple responses) sorted out from the responses made by the OFO respondents. *50 out of 64 respondents answered this question (14 were without data)*. These were clustered into three major themes:

1. **Resource Mobilization towards Strengthening the capacity of OFOs for the Promotion and recognition of OA in the region for improved Food Safety, Security and Sovereignty;**

- This emerged as the number one benefit expected by OFOs at 66.60% (62 counts) according to the survey. The respondents who represented OFOs expressed that a pan-African Network of OFOs should have the capacity to mobilize resources for institutional support to OFOs and other key stakeholders in programs aimed at institutional development.
- It is expected that this shall then enable the strengthened institutions to enhance coherent networking, information access through effective dissemination channels, facilitate learning, knowledge, skills and experience sharing to enable farmers within their organizations to actively pursue their interests through a common voice, mutualize resilience strategies for lasting solutions, at all levels from country to country with peers all across the continent.
- The Pan-African Network is also expected to actively engage its membership and partners for a common voice greater organic movement and collectively participate in activities that promote and lead to more recognition of Organic Agriculture as well as Agro-Ecological Agriculture within African states, as a benefit that leads to improved Food Safety, Security and Sovereignty. The OFO respondents further argue that this shall lead to widespread acceptance and scaling up of the OA and AE practices among farming communities and shall enable farmers to learn from each other's experiences and improve their farming practices.

2. **Facilitate Market Access for OFOs;**

- The study ranked Facilitating Market Access for OFO members as the second most expected benefit from a Pan-African Network of OFOs for the perspective of OFO respondents that participated in the survey. The OFO respondents re-echoed this benefit repetitively in 19 counts, which statistically represented over 20% of the ideas that were floated as expected benefits.
- In their own expressions, they stated that creating market linkages for producers (both with small and large farms, by directly working together across Africa to establish regional and international markets for their products should be high of the agenda.
- It was further mentioned that strategies should aim at improving organic agricultural enterprises for commercial production, marketing and trade at local level through promotion of Participatory Guarantee Systems; Opening up of intra-Africa trade for

organic products; and increase access to global markets through support to access organic certification for export trade. It was pointed out that this benefit, when realized, can ultimately cause community transformation through job creation, income generation and improved livelihoods.

3. **Influence Policy;**

- Another key benefit (12 counts; 13%) expected from a Pan African Network for organic farmers organizations is that of establishing a stronger voice in advocating for policies that support organic and Agro-ecological agriculture.
- This could include lobbying governments through the African Union and Head of States to commit funds for research and development, extension services to increase technical support and information sharing on good practices in OA, marketing support for organic products and investing in strategies to harmonize ecological practices in Africa.

Among the other benefits mentioned it was categorically stated that organic farmers across Africa could pool their resources to collectively address common challenges. This could include sharing equipment and infrastructure, working together to improve soil health and manage pests and diseases.

b) Expected benefits of a Pan-African Network of Organic Farmers' Organization from the non-OFOs perspective:

Similarly, the views in the form of benefits that were mentioned by the non-OFO stakeholders were grouped into three categories. Interestingly, these coincided with those of the OFO respondents although they were stated differently. In total, there were 56 counts. *Under the other stakeholders, 42 out of 47 respondents answered this question (5 were without data).*

1. **Promoting regional and continental networking to empower organisation of farmers at the grassroots, strengthen the voice of organic farmers for the development of OA in Africa;**

- This proposal scored 34 counts (61%). It corresponds with and was merged with the first most-sought-after benefit as was mentioned by the OFO respondents in as presented in part a) above. According to the survey results, the various stakeholders feel that networking, sharing of ideas, experiences, creating synergies between actors for the same cause to avoiding duplication of efforts through stronger partnerships shall strengthen the organic Agriculture sector in Africa.
- It was affirmed that for the Pan African Network of OFOs to be effective, there is need to have a bottom-up approach, building national and regional strong structures that would then form the pan African organisation to build trust, ownership and allow knowledge Learning and exchange.
- In their respective views, they envisage that the network shall serve as a knowledge platform and through a synergy of actions, create awareness on the available food systems for food security, support the harmonization of approaches and methodologies in organic practices

through appropriate capacity building programs. This shall enhance linkages to reach organic farmers at the grassroots to have access to information and share knowledge for the promotion of the organic sector and for the purpose of delivering safe food to the African people.

- Uniting Organic Farmers Organization under a Pan-African Network shall strengthen small scale farmers at the grassroots who have been ignored for a long time. In that context, the respondents urged that since these are the majority, and believing in numbers for fundraising and other forms of mobilization, they offer more power to convince, influence decision-making processes when working under one voice with a joint position of promoting organic agriculture for healthy food for all.

2. Harmonization of standards and promoting regional trade;

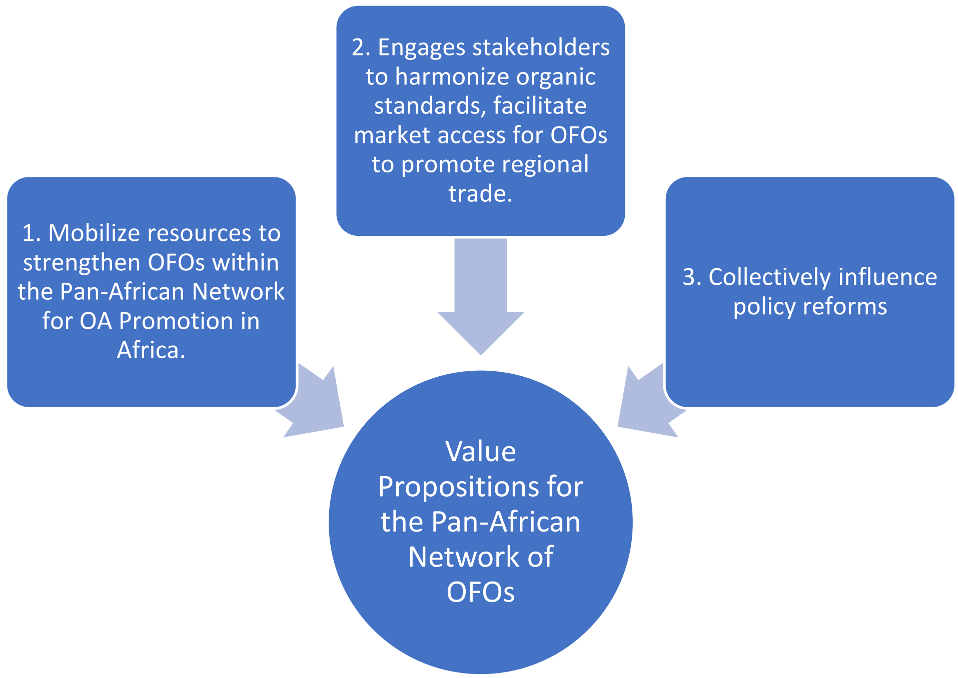
- When all the related submissions were merged, this benefit had 12 counts, which catered for 21% of the total counts. In their submissions the non-OFO stakeholders urged that promoting the marketing of organic products shall be a key benefit expected from the network. Efforts should be put on creating stronger market linkages and value addition for different value chains to enable organic producers have access to more remunerative prices for their organic products.
- Promoting the creation or strengthening of existing local and regional markets for organic products, harmonization of standards and marketing frameworks, facilitation of cross-border trade in organic products and creating sustainable linkages to the market in Africa and other continents.

3. Influencing policy reform;

- Again, among the three most emphasized expected benefits of the Pan African Network for Organic Farmers' Organizations was that of active engagement in influencing policy reforms to promote the OA sector. With an almost equal proportion similar to that of the OFO respondents (10 counts, accounting for 18%), the non-OFO respondents stressed the point of ensuring inclusion of Organic Farmer Organisations in policy and decision making at a much higher level.
- Continuous information flow and sharing for appropriate advocacy action plans at national and global level, with effective use of the power of numbers can cause a shift towards improved organic production, marketing and consumption of organic foods.

These two comparisons of the results on the expected benefits from a Pan African Network for Organic Farmers Organizations in the view of the stakeholder audience presents the value propositions to consider as defined "customer" benefits.

Figure 16: The perceived value proposition of the Pan-African Network of OFOs from the stakeholder audience.



It is interesting to note that the President of PAFO provided positive feedback to INOFO:

> ***"There is need for strong collaboration between PAFO and Regional FOs with INOFO members since majority of our Farmers are small holders and more than 70% practice purely organic farming."*** **Elizabeth Nsimadala, PAFO President.**

3:12 The Major roles OFOs can play under the Pan African Network for Organic Farmers Organizations.

In a multiple-response question, OFOs were asked to identify which major roles they felt they could play in the proposed Pan African OFO Network.

The results generated from the participating OFO responses were as presented in the table below:

Table 4: The Frequencies and Percentages for the major roles OFOs can play under the Pan African Network of OFOs.

Value	*Frequency*	*Percentage*
Mobilization of fellow farmers/producers to join existing OFOs/Farmer groups with a common goal.	45	70.31
Engage in collective organic guarantee systems such as PGS (Participatory Guarantee Systems) at community level.	40	62.5
Directly participate in the leadership roles from OFO/Farmer group level, networks at National and international level to influence programs, policies that affect their livelihoods.	39	60.94
Collaborate with CSO/NGOs promoting Organic/Ecological Agriculture in capacity building, policy advocacy and creation of market linkages.	37	57.81
Collaborate with existing coalitions, alliances, networks, fora for collective action in OA policy advocacy and related matters	37	57.81
Collaborate with NOAMs - National Organic Agricultural Movements network with other actors in the organic sector.	36	56.25
Select and engage in agricultural enterprises for commercial production/marketing/trade at group level for improved household incomes.	35	54.69
Collaborate with Research and Training institutions in matters of OA applied research	35	54.69
Mobilization of fellow farmers/producers to form other new OFOs/Farmer groups with a common goal.	32	50
Actively Participate in Internal Control Systems for Third Party Certification with Export companies and certification bodies for international trade.	32	50
Select and engage in agricultural enterprises for food and nutrition security at household level	30	46.88
Other roles (specify) *Draw on indigenous knowledge systems from traditional farming systems and secure seed that are typically eaten by local people.* *Create consultation frameworks bringing together consumers, producers, distribution to have ideas on market supply and demand but above all customer requirements.*	2	3.12

3:13 Priority Areas of collaboration with stakeholders.

Both OFOs and non-OFO respondents were further asked to mention which priority areas of collaboration they can have with INOFO in separate multiple-response questions. The results from both categories were as follows:

a) Priority Areas of Collaboration for OFOs

Table 5: Priority areas of collaborations for OFOs with INOFO.

Value	*Frequency*	*Percentage*[8]
Capacity Building of Organic Farmer Organizations/Farmer groups	44	68.75
Organic trade/market linkages	35	54.69
Advocacy	30	46.88
Farmer owned-seed system	30	46.88
Research	24	37.5
Other Priority areas (Specify) *Strengthen PGS initiatives in each country to promote organic agriculture* *Farmer field schools - proper demonstration sites and agri-hubs* *Exchange programmes to enhance learning &knowledge exchange*	4	6.25

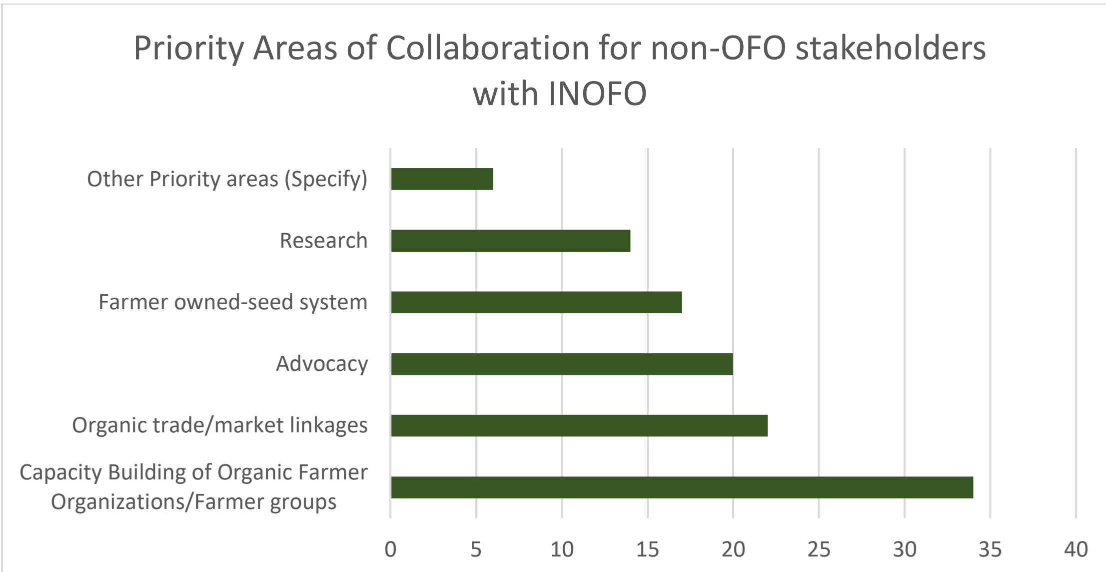
In response, OFO prioritized *Capacity Building of OFOs (69%)* followed by active engagement in *organic trade and market linkages (55%)*, involvement in *Advocacy activities (47%)* as well as promoting *Farmer owned-seed systems (also at 47%)*, followed by participating in *Research programmes (38%). Other priority areas (6%)* included *Strengthening of PGS initiatives, conducting farmer-field schools and exchange programs to enhance learning & Knowledge exchange (46 out of 64 respondents answered this question, 18 were without data).*

b) Priority Areas of Collaboration for non-OFO.

On the other hand, the non-OFO respondents *(42 out of 47 respondents answered this question (5 were without data*). The results indicate that most stakeholders with a total 34 counts point out that they can collaborate with INOFO in programmes and activities of Capacity Building of OFOs/Farmer groups, followed by those focusing on Organic Trade Development and Creation of Market linkages with *22 response counts*; Collaboration in Advocacy programmes was mentioned with *20 counts*; Promotion of Farmer-Owned Seed systems (*17 counts*); Research for OA and AE development by with a total of *14 counts*. Other priority areas of collaboration, which were mentioned included: Focusing on Women and youth involvement in agroecology; Conducting Exchange programs of knowledge sharing; Developing Market access for organic foods, Establishment of Quality assurance systems; Education and Social Enterprise Development and Safe food supply and marketing. These results are illustrated in figure 17 below:

[8] Note that each percentage was generated independently of the other values since these were multiple responses.

Figure 17: Priority Areas of Collaboration with INOFO with non-OFO stakeholders for OA Development in Africa.



A comparison of both results of priority areas of collaboration as expressed by the OFO and non-OFO respondents shows that both categories of stakeholders pointed out Capacity Building of OFOs as the first priority, followed by Organic trade/market linkages, Advocacy, promotion of Farmer owned-seed systems, Research and then other areas in a similar descending order of priority.

From these findings, it can be deduced that both categories of stakeholders are well-aligned in terms of common priorities that they focus on within their different organizations. The results may also have an indication of which existing resources in terms of capacity, experiences and developed programs may already exist among the different stakeholders on the continent.

The study findings resonate well with the insights from the recently ended 1st Eastern Africa Agroecology Conference that was held in March 2023, Nairobi, Kenya, where stakeholders in the Organic and Agroecology Sub sector discussed opportunities and possible solutions in the sector.

All additional comments and general remarks were positive and in support for collaborative actions by INOFO and other stakeholders to advance the agenda of promoting Organic Agriculture in Africa as shown in annex 8.

CHAPTER FOUR

4.0 Conclusions

This chapter presents the study conclusions about the analysis on the level of organization of the organic sector in Africa.

The respondents of the survey were randomly selected among the existing OFOs in the INOFO Network in Africa and those in contact with INOFO Convenors and Country Contact persons, who were willing to voluntarily participate in the study. All responses were in English (from participating countries in Southern Africa, Eastern Africa (except the respondent from Rwanda who used French), most respondents from West African countries These conclusions therefore, are based on their opinions are captured in the survey. The characteristics of the OFOs are generalized based on the survey findings.

4.1 Characteristics of OFOs in Africa:

- OFOs in Africa have varied organization set ups including ordinary farmer groups, Cooperatives and other categories, in relatively equal proportions although Cooperatives were slightly more than other two options. Among the other categories included Associations or Networks, a Non-Government Organization operating at National level and an individual enterprise.
- 94% of the participating OFOs are registered with local authorities, and were established between 1983 to 2022, representing close to 40 years of linear progression in the formation of OFOs, which factors provide a basis for the possibilities of mainstreaming OA in the future if the trends continue in the same positive direction.
- Generally, OFO membership greatly vary per group ranging from as few as 6 members to as many as 16102 members and this variation cuts across all declared OFO categories from the different sub regions of Africa. Women cater for slightly more (over ½) members (53%) than men; both youth (13-36 years) and elderly (over 65 years) each cater for less than ¼ (18 - 20% of the membership while 54% (also just over ½) of the members fall under the age category of adults aged 36 - 64 years. gender characteristics, age groups, number of members. In some specific cases, groups are exclusively for women or for youth; while for some OFOs men outnumbered women in terms of membership.
- The Eastern and Southern Sub regions of Africa has a fairly good number of participating OFOs within the INOFO network in Africa, whereas the West African Sub region has less numbers and yet the Northern and Central Sub region has no representation at all, which is a true reflection of the current INOFO structures in Africa.
- The majority of Participating OFOs within the INOFO network in Africa are members of existing movements/fora/coalitions/networks but are eager to have a Pan African Network of OFOs.

4.2 Categorization of non-OFO stakeholders in Africa:

- Over three quarters of the non-OFO stakeholders are involved in an existing movement/forum/coalition/network and only one quarter doesn't. This clearly indicates the relevance of the existing mergers within the OA sector in Africa and how important it is to actively engage them in future interventions for beneficial collaborations. However, it is also worthwhile to explore collaborations with the remaining quarter of the stakeholders who may not be directly affiliated to the existing mergers if their purposes align with the vision and mission of INOFO. It was also observed that the stakeholders fully embrace the idea of having a Pan-African Network of OFOs to unify their voices and empower them to speak for themselves.

- The Non-OFO stakeholders, as characterized in this study come in a wide range of categories which include the following: NOAMs, National and Regional fora/alliances ot networks, National Organisations, all which fall under Civil Society Organizations or sometimes referred to as NGOs, since they are non-state actors. While NOAMs are pivotal as umbrella organizations which coordinate the organic sector at National Levels, and thus are relevant stakeholders for OFOs to connect with other service providers in the OA sector, National and Regional bodies are also very influential in the aspects of networking and capacity building as well. It should be noted that some countries do not have NOAMs.

- INOFO, should therefore be open to collaborations in different forms depending of the program(s) at hand or project designs with their specific objectives. These should be always inclusive at formulation stages to guide the processes in the different specific situations per country, sub-region, thematic area or the continent as a whole.

4.3 Categorization of other stakeholders:

In an earlier synopsis of the OA landscape in Africa, the other important stakeholders that were considered but not targeted in this study but operating within and outside the continent include the following: Other farmer federations and coalitions outside the organic sector; Institutions of learning; Research Institutions; State actors at national and regional levels; International funding agencies, IFOAM, AU, UN agencies among others as shown in annex 5.

These have both specific and overarching roles in the Agricultural sector as a whole, rural economic development, gender empowerment and above all the provision of funding. INOFO through the convenor and elected representations in different platforms already has established strategic working relationships with some of these key stakeholders and given their broad roles should be engaged in a case-to-case situation

4.4 Main purpose of OFOs:

- The study revealed that most OFOs exist for the following purposes in a descending order of their importance or priority;
  - OA for food safety, security, sovereignty and healthy ecosystems in local communities.
  - OA for conservation of indigenous, medicinal varieties & breeds and seed saving.
  - OA for sustainable livelihoods, income generation through collective marketing with fair prices and market conditions.
  - OA farmer mobilization and advocacy for better policies.
  - OA training for knowledge and skills transfer in organic practices, PGS and other beneficial engagements.

  These purposes fit within the INOFO vision and mission.

4.5 Priority areas of focus addressed by non-OFO stakeholders in the OA sector:

- The study established the following priority areas as key for the majority of non-OFO stakeholders in descending order of significance:
  - Promotion of OA, Farmer-managed Seed Systems, OA production and marketing services.
  - Advancement of OA education, training and extension services.
  - Networking and Advocacy for legislation favorable for OA/AE development.
  - Offering OA certification, certification support services, PGS development.
  - Organization Development, Leadership, Gender empowerment, connecting resources with Grassroot organizations working with Farmers.
  - Research for OA and AE Development.
  - OA input services
- The priority areas of focus for the non-OFO stakeholders are harmonious with the shared purposes of the participating OFOs. In this context, when the two are combined they represent the observed Value Propositions for Key Stakeholders involved in OA/AE Development in Africa.

4.6 Challenges faced in the OA sector:

- **First priority challenges;**
  - Limited Access to Markets for Organic Produce.
  - Inadequate knowledge and skills in OA agronomy; Soil fertility management, Pest & Disease Management in OA.

- Limited Access to Financing OA development.
- Lack of Legislation and policy framework to safeguard OA operation space.

- **Second priority challenges;**
  - Climate Change and its impacts on smallholders
  - Limited Access to Organic seed and to sell Organic Seed
  - Inadequate Organization Development (OD) at OFO Level, sectoral level
  - High costs for Organic Certification
- **Third priority challenges:**
  - Low Awareness levels among farmers and Consumers on benefits of OA Limited Access to Organic farm inputs
  - Limited capacity in Farm production Planning
  - Limited services in OA extension, Limited Advocacy & information dissemination
  - Producing enough healthy food amidst shrinking agricultural space
  - Poor Networking among actors in the OA sector

4.7 The needs of OFOs to address the challenges they face in the OA sector in Africa:

The study findings established the following needs as those required by the OFOs to address the challenges they face in the OA sector in Africa in a descending order of priority.

1. Increased funding commitment into OA development.
2. Inclusive policies such as access to quality sustainable seeds, financial investment in OA advocacy activities and Improved Extension services for OA.
3. Organizational Development for OA business development;
4. Investment in bilateral negotiations or community round table dialogues for fair prices.
5. Collective efforts to address climate change challenges.

4.8 Establishment of a Pan-African Network for Organic Farmers' Organizations:

Generally, most stakeholders are in agreement with INOFO to take on the role of a Pan African Network with OFOs playing a center role in the strengthening of the organized Organic Agriculture in Africa as already reflected in the on-going trends where INOFO is recognized as the voice of Organic Farmers speaking for themselves on the African continent and in other regions on the globe.

4:9 Observed Value Propositions for Key Stakeholders involved in OA/AE Development in Africa:

The following were the generally observed Value Propositions for Key Stakeholder in the OA sector in Africa based on the study findings (also see chart illustration in annex 7):

- Organisational Development, Capacity Building in Farmer Leadership, Connecting Resources with Grassroot Organizations working with Farmers.
- Networking & Advocacy for legislation favorable for OA/AE development.
- OA/AE Education, Training and Extension services.
- Promotion of OA/AE, Farmer-managed seed systems, OA/AE production & Marketing services.
- Research for Organic Agriculture and Agro-Ecology Development
- OA Certification, Certification services, PGS Development, Gender empowerment
- Organic Agriculture Input suppliers

4.10: Priority areas of Collaboration with stakeholders:

Both OFO and non-OFO respondents across Africa in the survey expressed the same priority areas of collaboration with Capacity Building of OFOs as the first priority, followed by Organic trade/market linkages, Advocacy, promotion of Farmer owned-seed systems, Research and then other areas in a similar descending order of priority.

- Stakeholders in the organic sector in Africa do embrace/shall embrace/have embraced INOFO's role as the OFO-led Inter-Continental Network of Organic farmer organisations (INOFO) targeting OFOs at the grassroots through active participation and inclusion processes, ensuring that the needs and rights of local farmers are guaranteed and protected.

4.11: Benefits of having a Pan African Network for Organic Farmers' Organizations:

The three major benefits expected of a Pan African Network for OFOs by both categories of stakeholders are:

1) A Pan-African Network of OFOs that has the ability to mobilize resources towards the strengthening the capacity of OFOs for the promotion and recognition of OA through regional and continental networking for improved food safety, security and sovereignty.

2) A Pan-African Network of OFOs that engages other stakeholders towards the harmonization of organic standards, facilitate market access for OFOs to promote regional trade.
3) A Pan-African Network of OFOs that emphasizes a collective, inclusive drives towards achieving conducive policy reforms at National, Regional and Continental levels to facilitate OA development in Africa.

4:12 The perceived value proposition of the Pan-African Network of OFOs from the stakeholder audience:

1. Mobilize resources to strengthen OFOs within the Pan-African Network for OA Promotion in Africa.
2. 2. Engages stakeholders to harmonize organic standards, facilitate market access for OFOs to promote regional trade.
3. Collectively influence policy reforms

4:13 The Major roles OFOs can play under the Pan African Network for Organic Farmers Organizations.

The following were the major roles OFOs identified with to take on under the Pan African Network of OFOs:

- Mobilization of fellow farmers/producers to join existing OFOs/Farmer groups with a common goal.
- Engage in collective organic guarantee systems such as PGS (Participatory Guarantee Systems) at community level.
- Directly participate in the leadership roles from OFO/Farmer group level, networks at National and international level
- Collaborate with NOAMs, CSO/NGOs, coalitions, alliances, networks, fora promoting Organic/Ecological Agriculture for collective action in OA policy advocacy.
- Select and engage in agricultural enterprises for commercial production/marketing/trade at group level for improved food and nutrition security & household incomes.
- Collaborate with Research and Training institutions in matters of OA applied research.
- Actively Participate in Internal Control Systems with Export companies and certification bodies for international trade.

4:14 Priority Areas of collaboration with stakeholders:

Both OFOs and non-OFO respondents mentioned the following as their priority areas of collaboration with INOFO:

- Capacity Building of Organic Farmer Organizations/Farmer groups
- Organic trade/market linkages
- Advocacy
- Farmer owned-seed system
- Research

From these findings, it can be deduced that both categories of stakeholders are well-aligned in terms of common priorities that they focus on within their different organizations.

CHAPTER FIVE

5.0 Recommendations

- INOFO should continue to actively engage in effective OFO mapping through the existing INOFO structures at Country level. INOFO Country Convenors and/or INOFO Contact persons at country level should be supported to establish functional structures recognized by stakeholders in the OA sector and other relevant partners, which shall propel the Mapping process. The process shall bring more clarity on What is an OFO in the INOFO context, and *when an OFO is not and OFO.*
- INOFO should consider inclusion of OFO representatives into the African Council or on the regional technical team with proficiency in English and/or French depending on their roles and sub region of service to ensure easiness and effectiveness in communication.
- In the process of INOFO rolling out in Africa should start from *known-to-unknown*. Based on the study finding therefore, INOFO should consolidate its operations in Africa starting with the Sub-regions, Countries and specific locations with OFOs already active in its network, with Seed Savers Network Kenya maintaining the role of the INOFO Secretariat in Africa. These include Southern Africa Sub-region & Eastern African sub-regions of ESA and the West Africa sub-region of WCA.
- In a similar way, INOFO can start exploring partnerships with the existing non-OFO stakeholders, in the continued mapping process (since these have already expressed willingness to partner with INOFO) and possibly in other interventions, but more elaborative discussions have to be held for effective communication to achieve the desired outcome of the relationships.
- Among key considerations for INOFO Africa is the possibility of joining PAFO – the Pan African Farmers' Organization to leverage her role as a Pan-African Network for Organic Farmer Organizations.
- Depending on the intervention targets, timelines can be set in the future for mapping out OFOs in ne regions/Countries/specific locations.
- The study findings about the gender characteristics, age groups and numbers are indicative of the prevailing situation and may guide the general understanding of OFO characteristics for generic planning purposes but in situations where specific programs are to be designed targeting specific OFO categories such as cooperatives, youth groups, women groups, etc. in any given sub-region due diligence has to be made.
- The INOFO Governance Structures (in Africa and/ or including the Global Team) should continue to engage future partners for exploration of funding options, and other forms of strategic partnerships on case-by-case basis represented by designated delegates, a team of INOFO Convenor representatives or appointed staff members as may apply in the future to establish more concrete working partnerships.
- The Governance and Management models for INOFO as a self-organized body at the different levels should embrace autonomy at regional, sub-regional and National levels to allow ownership and active engagements with the OFO membership, vibrant collaborations with Key stakeholders while upholding a common mission and vision at all levels – *See annex 1: Draft*

hypothesis on how to best structure the organic farmers' organizations in Africa; 1.2: Proposed structure for INOFO Africa and relationship with stakeholders in the OA sector; 1.3: Notes on the proposed structure for INOFO Africa and relationship with stakeholders in the OA sector.

- INOFO Africa should make concerted efforts in OFO engagement in the Northern Africa and Central African Sub Regions, increase vigilance in the Western African Region but also consolidate the efforts of the network within the Eastern and Southern African Sub Regions to truly depict and serve the entire continent.
- INOFO programs should focus to contribute to the achievement of the main purposes of OFOs in their respective locations across Africa.
- INOFO can easily create synergies with non-OFO organizations as facilitating agencies or collaborative partners in advancing the promotion of OA in fulfilment of OFO purposes.
- INOFO should establish strong organizational leadership at country and sub-regional level in Africa, to enable OFOs within INOFO through relevant collaborations within the existing structures, coalitions, movements and networks directly engage with state actors, AU, UN agencies, the international donor community formulate programs, projects, partnerships to support OFOs at National, Regional and Continental levels based on their current needs to enable them address the existing challenges in OA development as expressed by the OFOs in this study.
- In future programs, INOFO can engage the different stakeholders to forge mutually benefiting partnerships, strengthen working collaborations to address similar challenges.
- INOFO in Africa should aim at developing programmes that shall contribute to answering the real "why" of its existence on the continent through achieving tangible results of change (outcomes) that can, over time, be seen as measurable improvements (benefits) in the specific areas outlined below as reflected all throughout the results of this study:
    - **Increased market access for better incomes by organic producers within their OFOs in Africa**
    - **Capacity Building for Organization Development of OFOs**
    - **Inclusion of OFOs to influence and harness from the benefits of better policies that affect their livelihoods**
    - **Participatory Research for problem solving in the Organic Sector in Africa.**
    - **Seed access for food sovereignty by Organic Producers within their OFOs/Farmer groups in Africa.**
- INOFO should consider re-evaluating the generally observed Value Propositions for the stakeholders in the OA sector during future interactions such as partner workshops, meetings or on a case-by-case basis as may apply to validate or update the study findings to match prevailing situations.
- INOFO can use results on the expressed priority areas of collaboration (with INOFO) by both OFOs and non-OFO as an indication of which existing resources in terms of capacity, experiences and developed programs may already exist among the different stakeholders on the continent to guide her partnership processes.

ASPECTS RECOMMENDATIONS FOR FURTHER ASSESSMENT DURING INTERVENTIONS OR FOR FUTURE STUDY.

- INOFO in the future should take particular interest in assessing the existing governance structures of the different OFOs to understand how they operate internally but also to identify the capacity needs assessment for OFOs.
- The study did not explore deeper details about OFO governance and management structures, the farm-holding sizes and practices, the agricultural enterprises (crop, animal or mixed production and/or processing) carried out, the level or production/processing capacities, product types, organic status (certified, in-conversion or not yet certified), application organic guarantee systems (PGS or TPC) or their targeted markets (local communities, regional or international). These were outside the scope of the study. These can be considered in further studies depending on their applicability in future programmes.

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Annexes

1. **DRAFT HYPOTHESIS ON HOW TO BEST STRUCTURE THE ORGANIC FARMERS' ORGANIZATIONS IN AFRICA.**

    1.1 Relationship of INOFO Africa with Key stakeholders Across the region.

    1.2 PROPOSED STRUCTURE FOR INOFO AFRICA AND RELATIONSHIP WITH STAKEHOLDERS IN THE OA SECTOR.

    1.3 NOTES ON THE PROPOSED STRUCTURE FOR INOFO AFRICA AND RELATIONSHIP WITH STAKEHOLDERS IN THE OA SECTOR.

2. **OBSERVED VALUE PROPOSITIONS FOR KEY STAKEHOLDERS INVOLVED IN OA/AE DEVELOPMENT IN AFRICA.**
3. **THE PERCEIVED VALUE PROPOSITION OF THE PAN-AFRICAN NETWORK OF OFOS FROM THE STAKEHOLDER AUDIENCE.**
4. **AN ILLUSTRATION OF THE STAKEHOLDERS' RELATIONSHIPS IN THE OA SECTOR IN AFRICA**
5. **SUMMARY OF THE GROUPED CATEGORIES OF STAKEHOLDERS IN THE DIFFERENT SUB REGIONS OF AFRICA.**
6. **LIST OF PARTICIPATING OFOS IN THE SURVEY FOR THE STUDY ON STRENGTHENING OF THE ORGANIZED ORGANIC AGRICULTURE IN AFRICA THROUGH THE INTER-CONTINENTAL NETWORK OF ORGANIC FARMERS' ORGANIZATIONS (INOFO).**
7. **LIST OF NON-OFO RESPONDENTS IN THE SURVEY FOR THE STUDY ON STRENGTHENING OF THE ORGANIZED ORGANIC AGRICULTURE IN AFRICA THROUGH THE INTER-CONTINENTAL NETWORK OF ORGANIC FARMERS' ORGANIZATIONS (INOFO)**
8. **PROPOSED REGIONS/COUNTRIES FOR CONSOLIDATING THE INOFO ROLLING-OUT PROCESS**
9. **LIST OF ORGANIZATIONS WITH EXISTING COLLABORATIONS AMONG PARTICIPATING STAKEHOLDERS**
10. **ADDITIONAL COMMENTS OR FEEDBACK TO INOFO FROM OFO PARTICIPANTS**
11. **ADDITIONAL COMMENTS OR FEEDBACK TO INOFO FROM NON-OFO PARTICIPANTS**
12. **Questionnaire for OFOs/Farmer groups: Strengthening of the organized Organic Agriculture Sector in Africa. Questionnaire pour les OABio/groupements d'agriculteurs: Renforcement du secteur organisé de l'agriculture biologique en Afrique** *(See PDF Attachment)*.

13: Questionnaire for Other Key Stakeholders: Strengthening of the organized Organic Agriculture Sector in Africa. Questionnaire pour les autres acteurs clés: Renforcement du secteur organisé de l'agriculture biologique en Afrique *(See PDF Attachment)*.