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IFOAM ORGANICS INTERNATIONAL
ProFound Advisers In Development

Boosting Organic Trade in Africa

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

COUNTRY MARKET BRIEF FOR TOGO

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

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

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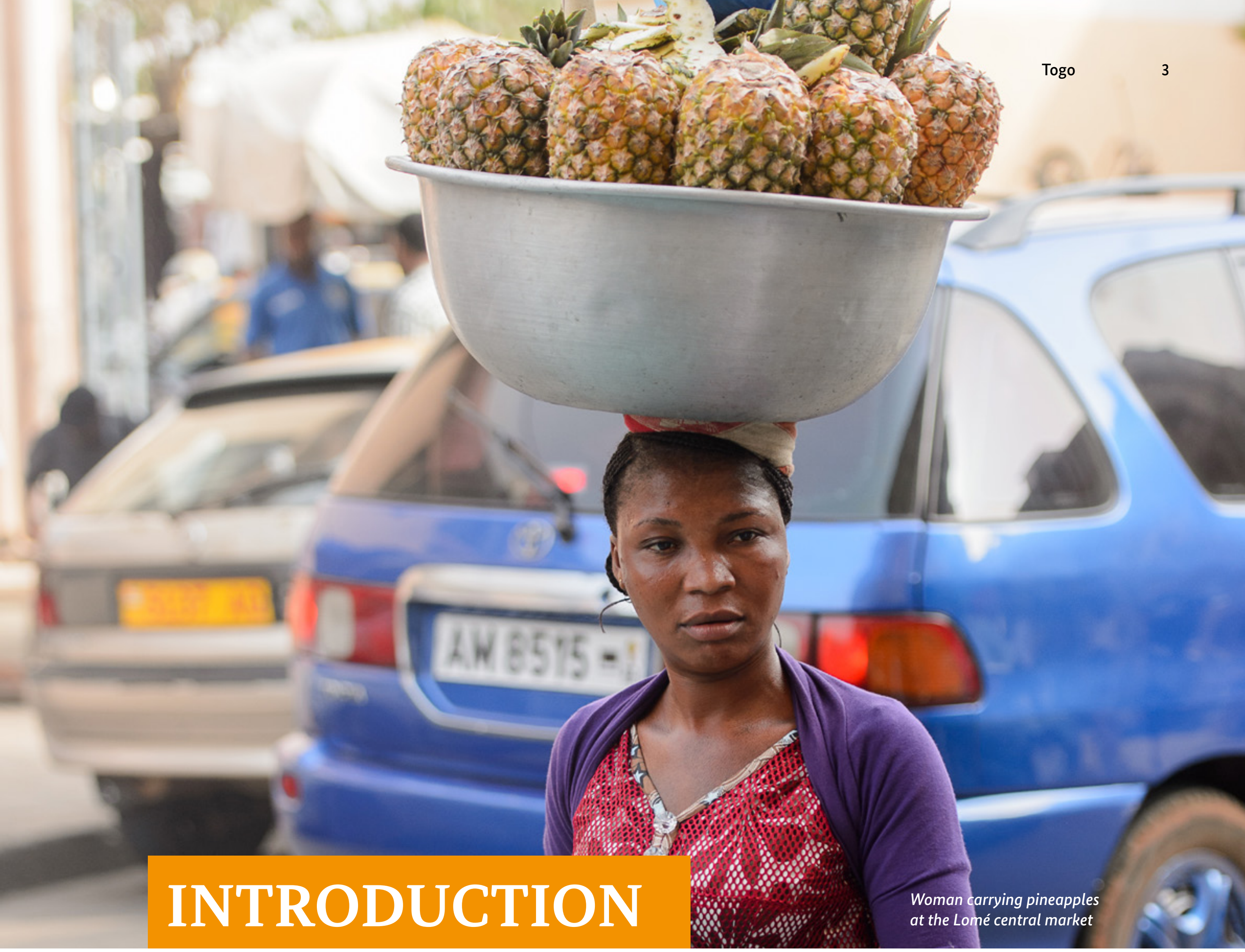


INTRODUCTION

Woman carrying pineapples at the Lomé central market

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

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

This Market brief focuses on the organic market of Togo. The complete series includes the following Market briefs:

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

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

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

Overview and development

Togo has the highest number of organic producers of all West African countries (and the 6th highest in Africa). With 1% of its arable land being dedicated to organic agriculture, it ranks 8th in Africa. As for import volume of organic products into the European Union (EU) it ranks 14th, making it the 2nd biggest exporting country from Africa and the 1st from Sub-Saharan Africa to the EU. The export of organic products is dynamic and has increased considerably. In the decade 2000-2010, Togo had between 2,000 and 3,000 ha certified organic agriculture land. From 2014 to 2019 the surface dedicated to organic agriculture increased to more than 40,000 ha or 44,000 tonnes (t) of exports to the EU. Of those 40,000 ha only 15,000 ha are reported to be fully converted, signifying that a large fraction of the organic agricultural land is currently under development. The most important organic certified commodities from Togo include cocoa, soy beans, fruits (pineapple, mango) as well as smaller quantities of cashew, coffee, ginger, spices, vegetables and peanuts.

While overseas exports are thriving, institutional development and relevant domestic trade and consumption are emerging. A stakeholder analysis conducted by IFOAM – Organics International within the Organic Markets for Development (OM4D) project concluded that a more intensified cooperation between the many diverse actors holds promising potential. The organic umbrella organisation Association Nationale pour l'Agriculture Biologique au Togo (ANA-Bio Togo) was founded in October 2019, and already comprises around 100 members. Various associations (AMAP - Association pour le Maintien de l'Alimentation et l'Agriculture Paysanne, Experta, Zanito, Tropic Teckno) market local (non-certified) organic products and can be considered progressing PGS[1] initiatives.

The government's attention to the opportunities and importance of organic agriculture has been increasing in recent years. In 2019, it drafted a 5-page concept note on a national transition of the agricultural sector towards organic farming and suggests a quasi-total conversion to organic by 2030 including crops, livestock and fisheries. The Ministry of Agriculture together with stakeholders such as ANA-Bio Togo and GIZ are drafting a national organic action plan serving as a strategic plan for the whole sector.

Local standards and certification bodies do not exist in Togo yet. Exporters rely on international certifiers. Recognised PGS are not in operation in Togo and certain stakeholders see challenges in finding local consumers that are willing or able to pay premium prices and/or trust local conformity assessment processes. In contrast, in ANA-Bio's view an operational PGS can be expected shortly.

A number of non-governmental organisations (NGOs), including Coordination Togolaise des Organisations Paysannes et de Producteurs Agricoles (CTOP), the Togolese farmer association, Bio Dream, Mission des Volontaires Contre la Pauvreté (MVCP), Recherche, Appui et Formation aux Initiatives d'Autodéveloppement (RAFIA), World Wide Opportunities on Organic Farms (WWOOF) etc. are promoting organic agriculture in Togo. The civil society has played an important part in lobbying the government on the need to support the emergence of organic trade. International organisations such as IFOAM – Organics International, Economic Community of West African States (ECOWAS), Friends of the Earth, Groundswell and TERO support organic development and conversion.

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

Woman selling fruits at her stand in Lomé

Togo‘s organic production

Infographic Togo‘s organic production

Organic certified agriculture land:
41,323 ha (converted and under conversion)

Organic certified other areas (wild collection):
0 ha

Percentage of Agriculture:
1.08%

Organic producers:
38,414

List of active certification bodies in Togo:

- Ecocert
- Certisys
- Certification of Environmental Standards (CERES)

Table: Products and production in 2018 in Togo

Products	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Cocoa	a) 1,312	a) 2,632	d) 7 million	d) Assumption: EUR 2.6/ kg export price
Soybeans	a) 36,448	a) 59,650	n/a.	
Pineapple	a) 412	a) 14,044	d) 6 million	d) Assumptions: All sold fresh and EUR 0.7/ piece export price at 1.75 kg/piece
Cashew nuts	a) 904	d) 373	d) 3 million	d) Assumption: EUR 8.4/ kg export price
Mango	a) 84	a) 542	n/a.	

Sources: a) Research Institute of Organic Agriculture - FiBL (2018) statistics; CBI (2020) b) other statistics c) resource person estimates d) own estimates

Organic pineapple both fresh and dried represents a major organic production segment in Togo for which producers can expect a price premium of nearly 40%. Between 1,000 and 2,000 farmers in Togo produce about 20,000 tonnes of organic pineapple accounting for two thirds of its overall pineapple production. Production amounts to 30 to 55 t/ha and about 12 to 22 t/farmer depending on the region. In contrast to conventional farmers that often produce individually, organic farmers are organised in cooperatives and certify with internal control systems.

A farmer in the village of Zogbe showing the branch of a Moringa tree

Togo's organic market

Infographic Togo's organic market

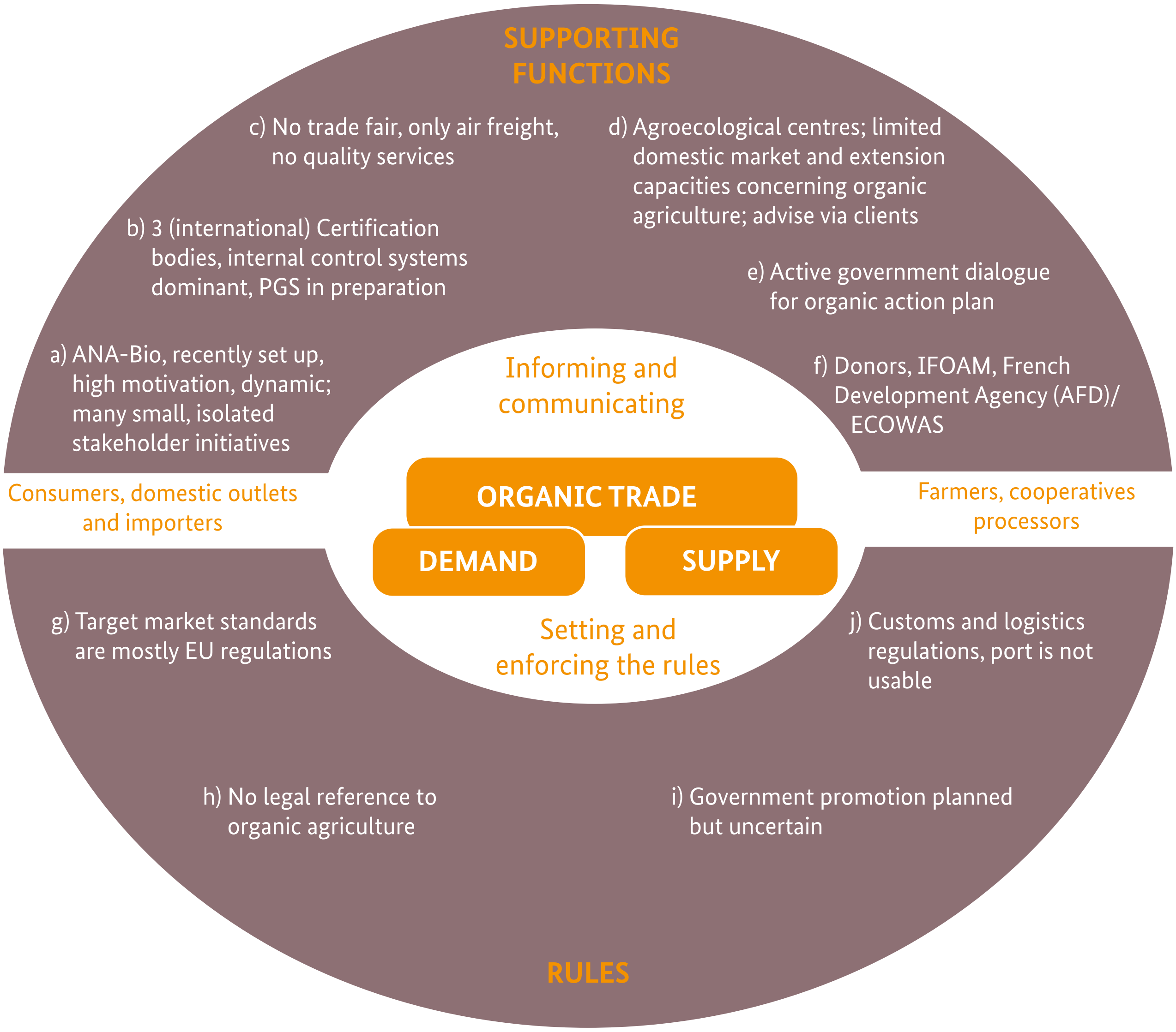
Main products for interregional export markets:
Pineapple, cocoa, mango, cashew nuts

Main products for domestic and regional markets:
n/a

Total volume of the exports:
44,684 tonnes to EU in 2019 (100% up from 2018) & 113 tonnes to USA in 2019

Total value of the exports:
n/a

Number of operators that are exporting from Togo: **31**



Letters in the doughnut refer to:

a) Organic umbrella
b) Certification, Internal Control Systems & PGS
c) Trade Facilitation
d) Research & Advise
e) Advocacy
f) Promotion & PR
g) Export Standards
h) Private Standards & Regulation
i) Promoting Policies
j) Trade Governance

Supply chains' demand

In 2019, a new organic pineapple juice processing plant was established (Label d'Or) with the capacity of 8 t/day. Other important large processors and traders demanding organic industrial raw products are Pronatura West Africa, Tropic Bio, Espace Kadoma and Soycain. Small and medium scale national organic input and processing factories don't exist. There is a total of 12 processors and 9 exporters in the country.

In terms of production, 9,000 t are marketed as fresh organic pineapples, 200 t as juice and 450 t (20% of production) as dried pineapples. These products are exported to Europe (95%) and to neighbouring countries (2%). The rest is sold in Togo (3%).

Supply chains' supply

Supply comes from farmers that are organised in groups lead by the processing or exporting companies. Efforts are presently being made to organise farmers in PGS for diversified products (e.g. vegetables) for the local markets.

Market place

The export market was established with strong growth in the hands of a few operators. The local market is slowly emerging with new passionate stakeholders but with limited stability and experience.

Smallholder farming plots near Anfoin

Supporting functions

Organic Umbrella: ANA-Bio, founded in 2019 with about 100 members. ANA-Bio takes Burkina Faso as learning example.	**Promotion and PR:** No activities exist to inform the public about organic agriculture and products.
Certification, ICS[2] and PGS: Ecocert (Burkina/France), Certisys (Belgium) and LACON (Germany). The setup of the first PGS is in discussion. **Advocacy:** ANA-Bio has consolidated advocacy to the government in its new mission. Numerous NGOs made a case for agroecology/organic agriculture. A relevant number of organisations showed interest in developing a sector and a movement (in contrast to developing trade only), e.g. development agencies, consumer associations, rural service providers, farmer associations etc.	**Research and Advise:** Various institutions include research and training activities of organic agriculture e.g. the Togolese Centre for Agricultural Training and Organic Production (Centre de Formation Agricole et de Production Écologique, CEFAPE), the International Centre for Agro-pastoral Development (Centre International de Développement Agro Pastoral, CIDAP), the Togolese Agroecological Centre (Centre Agroécologique du Togo) or the Professionals of Organic Agriculture and Environment in Togo (Professionnels de l'Agriculture Biologique et de l'Environnement au Togo, PABE-Togo). The government concept note on organic conversion indicates a total of 74 agro-ecological centres in the country. Ecological organic agriculture sector development projects: Organic Markets for Development (OM4D), implemented by IFOAM - Organics International and AgroEco (Dutch Cooperation) and Agroecological Transitions and Resilience of Rural Territories (Transitions agro-écologiques et résilience des territoires ruraux) implemented by ECOWAS (French Cooperation). Friends of the Earth, Groundswell and TERO are active with organic farming projects.

[2] Internal Control Systems

Rules

Export Standards: EU regulation	**Promoting Policies:** A national conversion concept note and a national organic action plan are in preparation.
Private Standards and Regulations: Apart from export standards from Europe no other standards or regulations exist.	**Trade Governance:** The Europe-Africa-Caribbean-Pacific Liaison Committee (COLEACP) facilitates certain value chains (e.g. both conventional and organic soy and pineapples).

Conclusions

Togo is an emerging organic marketplace with a rapid development in recent years. The country has been a producer of raw products for value chains driven by the European market for tropical products either for consumers (e.g. pineapples), for the processing industry (cocoa) or feed for livestock (soy). Togo has not yet developed and implemented an organic sector strategy.

Stakeholders report the need for vocational training of young farmers, solutions for organic system building, varieties/seeds development, collaboration in the movement, research and consumer information etc. Challenges concern the infrastructure (allowing for sea freight in addition to air freight), costly international certification and facilitated, transparent and multi-actor buyer markets.
The organic sector is presently driven by exports and the dynamic of a limited number of stakeholders, but a movement is emerging with the goal of building a local market and sustainable sector structures. According to stakeholders there is great potential in stimulating local demand based on structures and organised supply. Inspired by Burkina Faso, the export organic actors are committed to investing in the local market based on PGS.

Facilitation and inspiration for finding a common development path benefitting the local population and ecosystems is supported by IFOAM – Organics International/Agroeco and by the Agro-ecological Transition Support Project in West Africa (PATAE) of ECOWAS. Africa's organic institutions such as the West Africa Organic Network (WAfrONet), the African Organic Network (AfrONet) and the Ecological Organic Agriculture Initiative (EOA-I) of the African Union are not yet present in Togo and can support and include the movement. Promising steps such as the setup of a national umbrella organisation, a national organic action plan and information campaigns targeting the population and the government have been initiated. The sector has a great potential of becoming a partner for the local economy using opportunities for a sustainable economic, social, environmental, cultural and accountable development. Togo can get inspiration from the experience of other francophone countries in Africa, e.g. from Burkina Faso's PGS local market development strategies, Tunisia's sector governance and promotion, or Senegal's long-standing structures and narratives.

All these aspects – the dynamic start of ANA-Bio, the stakeholders' motivation, analyses and strategic paths, the international facilitation support and relevant learning models in other countries – are important factors contributing to the potential of Togo's promising organic market as a reference in West Africa and on the continent.


Woman buying fresh fruits in Kpalimé