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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 BURKINA FASO

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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Women packing mangoes for export

INTRODUCTION

The Burkina Faso 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 Burkina Faso. 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

The economy of Burkina Faso is to a large extent based on agriculture of smallholder farmers (30% of gross domestic product for 60% of people). The country has a very long history in organic agriculture. In the 1980s president Sankara had a vision for food self-sufficiency through agroecology and invited the Franco-Algerian pioneer Pierre Rabhi to reform agriculture. In 1988, the first (and so far only) Organic World Congress in Africa took place in Burkina Faso.

Presently, agriculture policies do not refer to organic agriculture. The government has a focal point for organic agriculture within the plant protection directorate, which is part of the Directorate General for Crop Production – a structure attached to the Ministry of Agriculture. Recently, extension agents supported by the Ecological Organic Agriculture Initiative (EOA-I) and the Swiss Cooperation started work. Other organic cooperation projects are being implemented by the Economic Community of West African States (ECOWAS) with support from the French Cooperation, and by IFOAM – Organics International with support from the Dutch Cooperation. The government subsidises agricultural inputs including organic inputs such as organic fertilisers or effective micro-organisms.

The National Council for Organic Agriculture (CNABio) serves as the umbrella organisation. Ecocert represents the leading certification body and has its own office in the country. CNABio has developed a private standard, which is mostly used with Participatory Guarantee Systems (PGS)[1] and not mandatory for the domestic market. There are about 30 groups operating with a PGS, of which some are also building an Internal Control System (ICS) for third party certification and the possibility to export. Most of the organic sector is export-oriented. The export market has grown from 7,000 ha in 2007 to now 60,000 ha with 25,000 producers producing mango, cashew nuts, shea nuts, moringa, sesame, soy, hibiscus, sorghum, tiger nut, cotton and medicinal and aromatic plants (MAPs). The same products are traded domestically, but the domestic market prioritises (fresh) vegetables, cereals, pulses and fruits.

Remarkable in Burkina Faso

>> Long history back to 1980s with Pierre Rhabi and first and only African Organic World Congress
>> Strong civil society and national coordination with a focus on domestic markets based on Participatory Guarantee Systems
>> Organic, agroecology, food sovereignty and fairtrade are strongly present and there is an integrated strategy
>> Failure of genetically modified cotton and corrective measures of the Government

The sector has a vast number (more than 70) of initiatives and non-governmental organisations (NGOs) that are working with organic agriculture and agroecology[2]. These have strong political expressions and lively debates about agricultural policies. Burkina Faso was one of the first African countries to introduce genetically modified (GMO) cotton and consequently saw a sharp decline in organic cotton after 2010. In 2018, based on the negative economic and environmental impacts, Burkina Faso abandoned GMO cotton.

The private sector closely connects organic and fair trade (called “marché biologique équitable”). Recently, increased attention is being paid to local market development. Burkina Faso is land-locked and a low-income country with infrastructural, institutional and social challenges such as widespread illiteracy in the population and among producers. Market challenges concern the non-availability of information and data, the low production lagging behind domestic and export demands, and expensive certification. The organic movement pursues a strategy of decentralisation, upscaling PGS and the introduction of certification for local distribution systems. Since 2018, local trade fairs have been organised several times a year.

[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
[2] http://www.burkinadoc.milecole.org/agriculture-durable/article-agroecologie-au-burkina-faso/

Mango tree with ripening fruits

Burkina Faso's organic production

Infographic Burkina Faso's organic production

Organic certified agriculture land:
56,663 ha (converted and under conversion)

Organic certified other areas (wild collection):
231,765 ha

Percentage of organic agriculture (of agriculture land):
0.47%

Organic producers:
26,627

List of active certification bodies:

■ Certification of Environmental Standards (CERES) ■ Certisys ■ Ecocert Burkina Faso (branch office) ■ Lacon ■ Suolo e Salute

Table: Products and production in 2018 in Burkina Faso

Products	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Cashew nuts	a) 17,960	a) 7,406	d) 62 million	d) Assumption: EUR 8.40 /kg export price
Mango	a) 10,213	a) 49,346	n/a.	
Sesame	a) 8,589	a) 3,170	d) 3.5 million	d) Assumption: EUR 1.10 /kg export price
Soybeans	a) 8,112	a) 15,191	n/a.	
Cotton	a) 4,591	b) 538	n/a.	
MAPs cultivated	a) 1,139	a) 150	n/a.	Incl. Ginger
Hibiscus	a) 374	a) 183	n/a.	
Peanuts	a) 29	a) 19,501	d) 28 million	d) Area and volume do not match; Assumption: EUR 1.50 /kg export price
Dried fruit	n/a.	a) 1,225	n/a.	
Shea nuts (wild)	a) 198,257	a) 7,189 - b) 14,869	d) 4 million	d) Assumptions: 30% shea butter yield and EUR 2 / kg export price shea butter
Fruits (wild)	a) 15,000	a) 13	n/a.	
MAPs wild collection	a) 1,500	a) 2	n/a.	

Sources: a) Research Institute of Organic Agriculture – FiBL (2018) statistics b) other statistics c) resource person estimates d) own estimates.

Vegetable production near Ouagadougou

While organic agriculture was initiated by pioneers and highest-level policy statements, it first evolved based on export markets with a substantial increase of production areas in recent years (eightfold increase since 2007 and threefold increase since 2014). Organic cotton for export seemed to be a success story, but the introduction of GMOs reduced production considerably for a certain period. The production is currently recovering, but still on a low level in comparison to former production.

Today, the main export value chains are mangoes, nuts (including shea), medicinal and aromatic plants, and cotton. The sector of wild collection also developed strongly and quadrupled since 2007. About 100 certified processors exist in the country.

Since 2013, the strategy for organic market development changed placing more focus on the domestic market and by building a national system based on PGS. Albeit still small with 30 PGS groups and around 500 producers on 80 ha, the production system became more robust integrating more female farmers (80% of PGS producers are women, 15% men and 5% legal entities), more diverse, fresh products for daily use and emerging processing facilities (30 jobs so far) for local needs. Fresh vegetables for home consumption and restaurants form the centre of attention.

In January 2020, a ginnery for organic cotton was opened in Koudougou[3].

[3] Glover, S. (2020). Burkina Faso opens organic cotton ginnery.


Locally roasted and sold cashew nuts

Burkina Faso‘s organic market

Infographic Burkina Faso‘s organic market

Main products for interregional export markets:
Cashew nuts, peanuts, mango, soybeans, sesame, shea

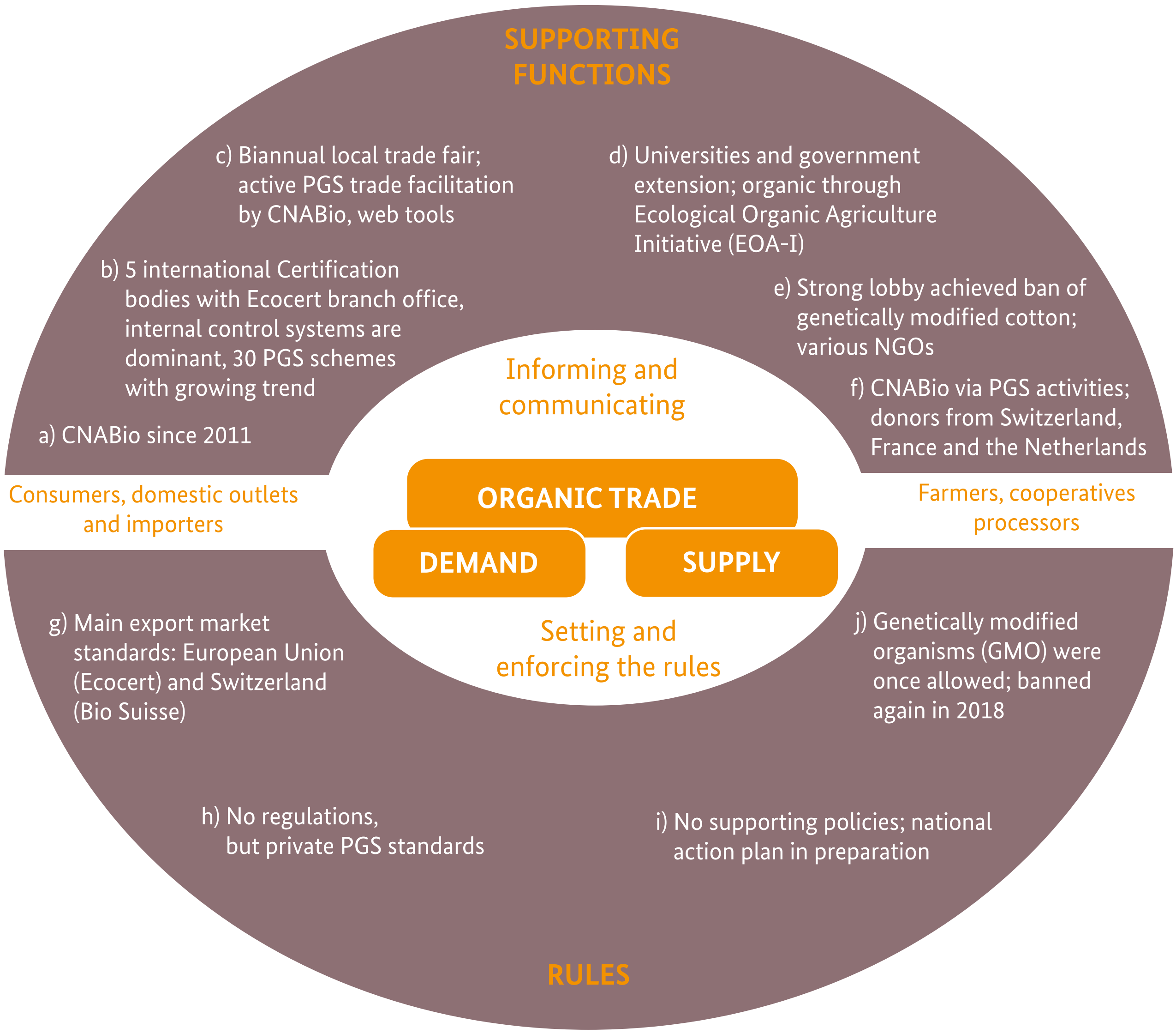
Main products for domestic and regional markets:
n/a

Total volume of the exports:
12,456 tonnes to EU in 2018

Total value of the exports:
n/a

Number of specialised/overall outlets in the domestic market: **30**

Number of operators exporting from Burkina Faso: **71**



Letters in the doughnut refer to:

a) Organic umbrella
b) Certification, Internal Control Systems (ICS) & 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 total, 71 exporters to Europe and partly to the USA are reported. Despite efforts in the past years, organic produce is not yet well known amongst consumers and trust needs to be further built for the national organic mark. The local demand and processing are slowly increasing.

Supply chains' supply

There has been a considerable development in the past years in terms of agriculture land and wild collection. Constraints exist regarding input supply (e.g. seeds), certification management and costs, limited support services (e.g. advisors), farmers' resistance to change, and competition from the conventional system of farming. There are eight input supply operators.

Market place

Approximately 30 sites, mostly in the Ouagadougou area, sell organic (PGS) products. The network is expanding. Various local organic trade fairs took place in 2018 and 2019. The international market is based on trade with importers (mainly from Europe) looking for raw products and usually taking the lead in organising the exports.

An entrepreneur in her cashew processing unit.

Supporting functions

Organic Umbrella: CNABio is the national umbrella organisation for agro-ecology and organic agriculture. It was founded in 2011 and has 65 (38 organisational and 27 individual) members. The fairtrade sector has its own umbrella, the "Plateforme Nationale de Commerce Equitable" (PNCE), which closely collaborates with CNABio.	**Promotion and PR:** Little information and PR services for consumers exist. However, in recent years this gap is being addressed through dynamic PGS development and the growing outlets for organic produce.
Certification, ICS[4] and PGS: Ecocert is the main certification body having a branch office in Burkina Faso. Other international certification bodies are Certisys, Certification of Environment Standards (CERES) and LACON. CNA-Bio's Central Committee (CCC) takes the final decision for certification and supports PGS.	**Research and Advise:** Various training and research institutions have become active in research on organic agriculture: Higher Institute for Agricultural Sciences and Technolgies (Institut Supérieur des Sciences et Technologies Agricoles, ISSTA), Burkinabe Agency for Standardisation (Agence Burkinabé de Normalisation, ABNORM), Environmental Institute for Agricultural Research (Institut de l'Environnement et de Recherches Agricoles, INERA) / National Centre for Scientific and Technological Research (Centre National de la Recherche Scientifique et Technologique, CNRST) (supported by the French Agricultural Research Centre for International Development, CIRAD), Nazi Boni University/Institute for Rural Development (IDR), Matourkou Agriculture Training Centre (CAP Matourkou). The Research Institute of Organic Agriculture – FiBL has conducted research on organic cotton and other crops as well as smallholder farmer production systems and agroecological resilience in West Africa. Stakeholders emphasise the importance of practical on-site research of operators. The EOA-I supported government extension agents. A survey revealed that 97% of the stakeholders use the internet for information research with CNABio being the single most mentioned source (34%) of information.
Trade Facilitation Services: Burkina Faso has eight consultancy offices for trade development services. Occasional support e.g. for participation at BIOFACH trade fair comes from the governmental agency APEX-Burkina (Agence pour la promotion des exportations du Burkina Faso).	**Information Service:** There are no particular popular organic information services.
Advocacy: A large and active civil society for organic agriculture, agroecology and fair trade exists.	**Financing Services:** It is very difficult to access affordable investment capital.

[4] Internal Control Systems

Rules

Export Standards: European Union, U.S. National Organic Program, and occasionally Japanese Agricultural, Brazilian and Korean Standards. Private standards comprise: Bio Suisse and various fairtrade standards such as Fairtrade International, World Fair Trade Organisation, Fair for Life and Naturland Fair.	**Promoting Policies:** Systematic public policies for the promotion of organic agriculture don't exist, but input subsidies include organic inputs. The opening to genetically modified seeds in 2008 led to a setback in organic production. Genetically modified cotton was banned again in 2018.
Domestic Standards and Regulations: CNABio has a national standard and a mark, which is usually PGS-verified. No regulations exist.	**International Cooperation:** Support is coming from ECOWAS/the French Development Agency (AFD), IFOAM (with Dutch support), and EOA-I (with Swiss support).

Processing cashew nuts


Overlooking the village of Nabou in the southwest of the country

Conclusions

Burkina Faso initially developed as a classic organic export country that translated little into a thriving local sector with developing institutions. In 2011, with local actors pushing for independence from international actors and focusing on agroecology and food sovereignty, actions were taken to set up a sustainable sector with the necessary institutions and market functions. The movement is following a strategy adapted to local conditions to build a sound and healthy sector that can deliver environmental and social benefits and contribute to inclusive human development creating empowerment opportunities e.g. for smallholder farmers and women. The opportunities arising from the private sector's international trade contributed to the required momentum and interest from stakeholders. At the same time, the lead of the civil society, supported by international cooperation, was crucial for developing more sustainable and balanced sector structures. Developing local markets and institutions is not in conflict with developing the export market. In Burkina Faso, both markets scaled up rapidly in parallel and with synergies.

Although the domestic trade lags behind international trade in terms of size, it has positive externalities. The domestic sector is decentralised, has numerous participants and beneficiaries and consequently is less dependent on few decision makers. Burkina Faso has found a promising strategy to further expand organic production and consumption and the organic actors in West Africa have an increased interest to learn from the country's development model.