BASELINE REPORT

BASELINE STUDY ON THE USAGE OF THE EAST AFRICA ORGANIC PRODUCTS STANDARD (EAOPS) BY COMPANIES IN KENYA, UGANDA AND TANZANIA

GIZ AFPQ-AfCFTA Programme

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ABBREVIATIONS AND ACRONYMS

AfCFTA	African Continental Free Trade Area
AfPQ	Alliance for Product Quality in Africa
BMZ	(German) Federal Ministry for Economic Cooperation and Development (Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung)
BvAT	Biovision Africa Trust
CERES	Certification of Environmental Standards
CSO	Civil Society Organization
EAC	East African Community
EAOM	East African Organic Mark
EAOPS	East Africa Organic Products Standard
EBA	EU's Everything But Arms initiative
EOA	Ecological Organic Agriculture
EU	European Union
FiBL	Research Institute of Organic Agriculture
GAP	Good Agricultural Practices
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HACCP	Hazard Analysis and Critical Control Points
IFOAM	International Federation of Organic Agricultural Movements
JAS	Japanese Agricultural Standards
KES	Kenyan Shilling
LLC	Limited Liability Company
MT	Metric Tonne
NOP	National Organic Program
NOAM	National Organic Agriculture Movement
NOGAMU	National Organic Agriculture Movement of Uganda
NGO	Non-Governmental Organization
OAA	Organic Agriculture Association
OA	Organic Agriculture
OPG	Operation System Plan (often abbreviated OSP in certification contexts)

PGS	Participatory Guarantee System
PPPs	Public–Private Partnerships
SPSS	Statistical Package for the Social Sciences
TOAM	Tanzania Organic Agriculture Movement
UAA	Utilised Agricultural Area
UGX	Ugandan Shilling
UNBS	Uganda National Bureau of Standards
UNEP	United Nations Environment Programme
UNCTAD	United Nations Conference on Trade and Development
URSB	Uganda Registration Services Bureau
USDA	United States Department of Agriculture
TZS	Tanzanian Shilling

ACKNOWLEDGEMENTS

OPERATIONAL DEFINITION OF TERMS

Certification-readiness	A company's position in the organic accreditation journey: Not prepared (no plans or resources); Considering (intent to apply within 12 months); In process (application submitted or audits underway); Fully certified (holds valid EAOPS or equivalent credentials)
Cold-chain infrastructure	Self-reported post-harvest handling capabilities for temperature-sensitive products: None (no refrigerated storage); Limited small-batch (portable or shared units); Basic export-grade (dedicated cold rooms meeting minimum standards); Advanced large-scale (integrated, high-capacity cold chain with real-time monitoring)
Conventional methods	Production practices that utilize synthetic fertilizers, pesticides, herbicides, genetically modified seeds, growth regulators, and conventional feed inputs for livestock. A firm is considered to operate "conventional methods" when none of its output meets recognized organic criteria (0% organic-output share).
Digital traceability	The use of electronic systems (e.g., QR-codes, RFID, blockchain platforms) to capture and share product movement and handling data at each node of the value chain, ensuring end-to-end visibility and rapid recall capability.
Logistics reliability	A firm's assessment of its supply-chain performance: Unpredictable (frequent long delays); Moderate (occasional setbacks, manageable risk); Generally reliable (consistent and forecastable lead-times); Highly efficient (minimal delays and robust contingency plans)
International standards	Globally recognized benchmarks for production and food safety, such as EU Organic Regulation (EC 834/2007 & EC 889/2008), USDA National Organic Program (NOP), Japan Organic Agricultural Standard (JAS), GlobalG.A.P., ISO 22000, and BRCGS, which buyers require for market access and premium pricing.
Early-growth	A company in its 3rd–5th year that has moved beyond proof of concept and is actively expanding production, sales channels, and workforce. These businesses are building brand recognition but may still face challenges in achieving consistent revenue streams and operational efficiencies.
Established	A company operating for 6–10 years with demonstrated product–market fit, stable or incremental annual outputs, and a solid presence within its core markets. Established firms often have refined internal processes and reliable distribution networks but may be exploring diversification to sustain growth.

Expansion mode	A company, of any age, that is strategically broadening its portfolio of products, entering new geographic markets, or adding services (e.g., processing, certification support). Expansion-mode firms invest in new infrastructure or partnerships to capture additional market segments and drive above-average growth.
Export orientation	A firm's engagement with cross-border trade, classified as: Currently exporting organic (only certified organic goods); Exporting both organic & conventional; Planning future organic exports (no current exports but concrete plans); and No export orientation (no exports planned or underway)
Export-readiness capacity	A measure of how much a company can increase production for export using existing resources: Fully constrained (cannot scale without major capital expenditure); Up to + 25% (minor process tweaks suffice); + 26–50% (moderate adjustments in staffing or equipment); and > 50% (readily scalable with current assets)
Fully organic methods	Agricultural and processing practices that adhere exclusively to organic principles, no use of synthetic fertilizers, pesticides, genetically modified organisms, or prohibited inputs, throughout the production cycle, as defined by EAOPS and equivalent international organic standards.
Mature	A well-entrenched company (>10 years old) with high brand recognition, diversified revenue streams, and a track record of stable or growing outputs. Mature firms typically leverage economies of scale, have deep export relationships, and act as market leaders or mentors in their sectors.
Organic-output share	The proportion of a company's total production volume (or revenue) that conforms to recognized organic standards. Categorized as:0% (fully conventional); 1–25% (minimal organic share); 26–50% (mixed operations); 51–75% (predominantly organic); and > 75% (almost fully organic)
Startup	A nascent company (≤3 years in operation) characterized by small-scale outputs, limited distribution channels, and an emerging customer base. Startups typically focus on validating their business model and establishing initial market traction.

EXECUTIVE SUMMARY

This report presents the findings of a baseline study commissioned by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and Biovision Africa Trust (BvAT) to investigate the usage and compliance of the East Africa Organic Products Standard (EAOPS) among companies trading in organic products in Kenya, Uganda and Tanzania. As part of the Alliance for Product Quality in Africa (AfPQ), BvAT, with funding from GIZ, on behalf of the Federal German Ministry of Economic Cooperation and Development (BMZ) aims to strengthen inter-regional trade by facilitating the adoption and sustainable use of EAOPS, working through the Kenya Organic Agriculture Network (KOAN) in Kenya, the National Organic Agriculture Movement of Uganda (NOGAMU) in Uganda, and the Tanzania Organic Agriculture Movement (TOAM) in Tanzania.

The primary aim of this study was to document companies actively trading in organic products across Kenya, Uganda and Tanzania, as well as conventional companies with clear potential to transition into the organic sector and scale within Eastern Africa. The specific objectives included the following: *identify a minimum of 60 companies (≈20 per country) and profile their activities; map stages of growth by outputs, geographic coverage, personnel and infrastructure; assess each company's economic contributions locally and nationally; determine export readiness, production capacity, existing contracts and standards compliance; evaluate EAOPS and other organic-standards adoption and alignment; diagnose barriers (including trade-related) and growth opportunities; and formulate recommendations to strengthen companies for domestic and export markets.*

The study employed a cross-sectional, mixed-methods approach to capture both breadth and depth of the organic sector's dynamics. The study utilized desk research to map existing organic standards, market trends and policy frameworks across East Africa. This was followed by structured, digital surveys of 95 companies, 37 in Kenya, 33 in Uganda and 25 in Tanzania, selected from the membership lists of National Organic Agriculture Movements (NOAMs) in Kenya, Uganda and Tanzania. To contextualize and deepen understanding of these quantitative findings, 15 key informant interviews with representatives from the NOAMs, as well as certification bodies, regulatory authorities and exporters' associations.

Primary data were collected between March 1 and May 30, 2025, achieving a total sample of 95 surveys and 15 in-depth interviews. Analysis combined descriptive statistics (SPSS) and thematic coding to triangulate the quantitative and qualitative data.

Study Findings

Objective 1: Identify at least 60 companies (20 in each country), their enterprise, and the services they are involved in.

a) **Young, integrated organic sector:** Study results reveal an organic market comprising young firms (51% of surveyed firms have been operating for five years or less) and an integrated value chain at sector level, spanning from primary production through processing, marketing, and export. Furthermore, 74% (65% in Kenya, 76% in Uganda, and 84% in Tanzania) of these firms already practice exclusively organic methods, and 56% (49% in Kenya, 55% in Uganda, and 68% in Tanzania) are formally organized as limited

liability companies (LLCs), demonstrating both a strong commitment and organizational capacity to support further scaling under EAOPS.

b) **Emerging export potential and local market strength:** While 78% (78% in Kenya, 88% in Uganda, and 64% in Tanzania) of companies serve local community markets, more than half (55% overall: 38% in Kenya, 61% in Uganda, and 72% in Tanzania) reach national buyers and almost one-third (31% overall: 19% in Kenya, 39% in Uganda, and 36% in Tanzania) trade regionally or internationally. Mature firms (10+ years) are leading this outward expansion, with 59% (32% in Kenya, 73% in Uganda, and 80% in Tanzania) exporting beyond East Africa, supported by diversified distribution channels, including a growing e-commerce via courier services. These findings present an opportunity to leverage the existing local dominance of companies and integrated operations to improve their access to regional and global organic trade.

c) **East African organic firms demonstrate limited export readiness, with even lower readiness for the 16 identified companies targeted for support:** The study aimed to identify companies across Kenya, Uganda, and Tanzania with potential for organic trade expansion, targeting 16 firms per country that are most in need of export-readiness support. The study selected companies based on their involvement or potential interest in organic farming, processing, marketing, or export. The study evaluated each company's readiness using ten key indicators: certification readiness, compliance with quality standards, quality control mechanisms, cold storage facilities, export packaging, logistics reliability, market knowledge, export documentation experience, existing export contracts, and willingness to invest. The analysis involved converting the responses into numeric scores (9, least ready, to 43, most ready) and ranking the companies per country, with the 16 lowest-ranked companies prioritised for support. The analysis revealed an overall low export readiness level (mean = 16.81, Standard Deviation (SD)[1]=3.25) among the surveyed firms, with Kenya scoring the lowest (mean = 14.69, SD=1.88) and Uganda (mean = 17.75, SD=3.07) and Tanzania (mean = 18.00, SD=3.58) performing somewhat better. All Kenyan firms (100%) fell into the low readiness category, highlighting an urgent need for foundational support. In contrast, Uganda (81% for low readiness and 19% for moderate readiness) and Tanzania (69% for low readiness and 31% for moderate readiness) exhibited slightly better baseline capabilities. None of the 16 firms fell in the high readiness category.

Objective 2: Document the stage of growth and development of the companies in terms of outputs, spatial coverage, personnel, and infrastructure development.

a) **Robust growth trajectory with clear export ambitions:** Survey findings demonstrate that the organic sector comprises a dynamic mix of companies at every stage of growth, ranging from 22% in start-ups to 20% in active expansion and 2% in full maturity. Across Kenya, Uganda, and Tanzania, a strong pipeline exists for future organic exports, with 55% of firms planning to enter organic export markets and 59% intending to expand their regional or international reach over the next 2–5 years. This intention among companies to increase exports regionally and internationally, particularly in Tanzania (84%) compared to Kenya (43%) and Uganda (58%), demonstrates the sector's preparedness to leverage its integrated value chains for growth.

[1] A higher standard deviation (variability) show considerable differences in company capabilities within and across the countries

b) **Operational gaps exist:** Despite high organic adoption, with 40% (41% in Kenya, 36% in Uganda, and 44% in Tanzania) of firms deriving over 75% of their output from organic production and nearly universal intentions among companies to invest in infrastructure (only 3% have no plans to invest in infrastructure while 27% have clear budgets and plans and 69% will invest conditionally), critical capacity constraints persist. Over half of companies (55% overall: 57% in Kenya, 52% in Uganda, and 56% in Tanzania) rely on basic, manual facilities, 55% (46% in Kenya, 70% in Uganda, and 48% in Tanzania) require significant adjustments to align with EAOPS, and 45% (41% in Kenya, 45% in Uganda, and 52% in Tanzania) of workforces have minimal organic training. Translating growth expectations (61% forecast significant expansion) into reality will depend on targeted upgrades in processing, storage, traceability, and workforce development, supported by tailored financing and technical assistance.

Objective 3: Identify scope, benefits, and contributions the companies are making to the local and national economy.

a) **Organic companies play a major role in local employment and the economy:** Over the past three years, 78% (78% in Kenya, 67% in Uganda, and 92% in Tanzania) of firms expanded their workforces, most notably in Tanzania and among mid-career companies, while 49% of all hires originated within a 50 km radius. Local hiring supports livelihoods, generates tax revenues and stimulates community development.

b) **Despite modest revenue scales, businesses are planning strategic investments with broader economic impact:** Although most firms remain micro to medium-sized, 79% (78% in Kenya, 76% in Uganda, and 84% in Tanzania) reported revenue increases, and 26% (24% in Kenya, 27% in Uganda, and 28% in Tanzania) now derive over 75% of their turnover from organic growth. Furthermore, 35% (35% in Kenya, 36% in Uganda, and 32% in Tanzania) plan new market expansion, 20% (Kenya (8%), Uganda (27%), Tanzania (28%) focus on certification for premium pricing, and invest in local sourcing of the workforce and training them; the sector will further contribute to the national GDP and export earnings.

Objective 4: Identify the export readiness of the companies – does the company have sufficient production capacity that can be committed to the export market?

a) **Moderate production capacity but limited scalability without investment:** While a considerable proportion of surveyed companies (52% overall: 59% in Kenya, 45% in Uganda, and 48% in Tanzania) reported moderate baseline production levels of 10—100 metric tonnes (MT), 37% (38% in Kenya, 36% in Uganda and in Tanzania) produce under 10 MT and only 12% (3% in Kenya, 18% in Uganda, and 16% in Tanzania) exceed 100 MT annually, few possess the internal resources to expand for export: just 15% (8% in Kenya, 18% in Uganda, and 20% in Tanzania) can scale output by more than 50% using existing assets, and 17% (22% in Kenya, 21% in Uganda, and 4% in Tanzania) require significant new investment to grow at all. Production volumes also correlate with firm age, with mature companies four times more likely to exceed 100 MT than startups. This observation means that younger companies will struggle to meet regional and international demand without targeted financing (i.e. access to finance) and infrastructure (e.g. necessary machinery) support.

b) **Strong export intent hampered by certification, quality, and logistics gaps:** With 73% (57% in Kenya, 85% in Uganda, and 80% in Tanzania) planning to secure organic certifications within 12 months and 71% (73% in Kenya, 70% in Uganda, and 68% in Tanzania) willing to invest in infrastructure meeting export requirements if provided with support, surveyed companies demonstrated a strong commitment to export readiness. However, critical gaps remain. Only 15% (22% in Kenya, 9% in Uganda, and 12% in Tanzania) are fully compliant with international quality standards (such as USDA National Organic Program (NOP), EU Organic Regulation (EC 834/2007 & EC 889/2008) etc), 57% lack any cold-chain capacity, and just 6% (8% in Kenya, 6% in Uganda, and 4% in Tanzania) benefit from highly efficient logistics. Furthermore, only 14% of the companies hold binding export contracts, with a majority relying on informal commitments. Addressing these deficiencies, particularly in infrastructure, logistics and certification, will be essential in translating export readiness into tangible market access.

Objective 5: Document the extent to which the companies are utilizing the EAOPS standard and other organic standards.

a) **Robust certification pipeline despite persistent uptake barriers:** Although only 22% (16% in Kenya, 18% in Uganda, and 36% in Tanzania) of companies currently hold organic certification and only 6% (6% in Kenya, none in Uganda and 16% in Tanzania) are EAOPS-certified, a near-universal proportion of uncertified firms (94% overall: (92% in Kenya, 86% in Uganda, and 100% in Tanzania) plan to formalize their credentials within three years, thus demonstrating a sector-wide commitment to meeting regional and international standards. However, high certification costs, complex traceability and auditing requirements, and uneven awareness of EAOPS, particularly in Kenya and Uganda, continue to impede uptake, highlighting the need for targeted financial incentives, audit support, and awareness-raising initiatives.

b) **Certification success depends on documentation and strategic standard additions:** Audit outcomes and documentation are closely linked to compliance levels: 58% (50% in Kenya and Uganda, and 67% in Tanzania) of certified companies achieved full or near-full compliance, correlating with 62% (50% in Kenya, and 67% in Uganda and Tanzania) reporting comprehensive record-keeping. At the same time, 20% (8% in Kenya, 17% in Uganda, and 31% in Tanzania) of firms aware of the EAOPS plan to acquire additional international certifications (e.g., EU Organic, USDA NOP) in addition to their initial regional accreditation. Continuous capacity building in documentation, traceability, and management of multiple standards will, therefore, be critical to enhancing the sector's export readiness.

Objective 6: Identify challenges (including trade barriers) and opportunities that these companies face.

a) **Persistent external barriers continue to constrain organic exporters:** Companies in the organic sector face several challenges including unreliable market data (67% overall: 73% in Kenya, 70% in Uganda, and 56% in Tanzania), weak policy incentives (60% overall: 54% in Kenya, 67% in Uganda, and 60% in Tanzania), limited export finance (60% overall: 38% in Kenya, 82% in Uganda, and 60% in Tanzania), logistics deficits (53% overall: 51% in Kenya, 52% in Uganda, and 56% in Tanzania), and complex regulatory and customs procedures (49% overall: 49% in Kenya, 64% in Uganda, and 32% in Tanzania). Better market intelligence data, dedicated financing mechanisms, and trade policy initiatives will help address these hurdles.

b) **Companies have specific growth strategies and priorities, with clear areas of collaboration**: A majority of companies (65% overall: Kenya (62%), Uganda (70%)) plan to diversify into value-added products and tap premium, health-focused niches, while 61% identify digital traceability and e-commerce as growth enablers. To capitalise on these opportunities and boost competitiveness, firms prioritise securing external support for market intelligence linkages (71% overall: (Kenya (57%), Uganda (85%), Tanzania (72%)), improved branding and marketing (69% overall: Kenya (62%), Uganda (70%), Tanzania (80%)), collective certification schemes to address costs (67%), infrastructure upgrades (66% overall: (Kenya (54%), Uganda (73%), Tanzania (80%)), and robust management and quality systems (61% overall: Kenya (51%), Uganda (73%), Tanzania (60%)). These plans must be complemented with policy advocacy efforts and alignment of regulations with global standards.

Conclusion

In conclusion, the organic sector in Kenya, Uganda and Tanzania is dynamic and determined; more than half of the surveyed companies (52%) are not more than than five years old, three-quarters (74%) already use fully organic methods[2], and nearly all (94%) plan to secure EAOPS or other certifications within the following year. While many companies serve local and national markets, and a growing minority export regionally and beyond, limited production scale (only 12% exceed 100 MT annually, and just 15% can boost output by over 50% without new investment), basic processing and cold-chain facilities, low levels of workforce training, and irregular compliance with global quality standards hamper their ability to meet international demand. Logistics challenges, high certification costs, complex traceability audits and uneven awareness of EAOPS, especially in Kenya and Uganda, limit their formal accreditation and constrain their export readiness. At the same time, almost 80% of companies have grown revenues and workforces over the past three years, and a clear majority intend to expand into value-added products, premium niches, and e-commerce.

[2] Agricultural and processing practices that adhere exclusively to organic principles, no use of synthetic fertilizers, pesticides, genetically modified organisms, or prohibited inputs, throughout the production cycle, as defined by EAOPS and equivalent international organic standards

1.0 INTRODUCTION

1.1 Background and context

Biovision Africa Trust (BvAT) is a not-for-profit organization established in Kenya in 2009 by the Biovision Foundation for ecological development in Switzerland and based in the International Centre of Insect Physiology and Ecology (ICIPE) in Nairobi. The Trust's goal is to alleviate poverty and improve the livelihoods of smallholder farmers in Kenya and other African countries through supporting dissemination of information and knowledge on appropriate technology to improve human, animal, plant, and environmental health.

The overall goal of the Trust is to sustainably improve the lives of the people in Africa while conserving the environment as the basis for all life. Its vision is a food secure African continent with healthy people living in a healthy environment with a mission of alleviating poverty and improving the livelihoods of rural communities in Africa through disseminating relevant agricultural information to small holder farmers and supporting likeminded organizations and institutions. BvAT focuses on facilitating the adoption of agroecology practices among smallholder farmers. The organization collaborates with governments, research institutions, and various stakeholders at sub-national, national, regional, and continental levels. Its efforts are centered on four main areas: promoting agroecology practices, supporting the diversification of ecological organic agriculture value chains, influencing policy and institutional frameworks, and driving innovations and socioeconomic research.

The Alliance for Product Quality in Africa (hereinafter: the AfPQ) is a multi-stakeholder partnership of actors from the European and African private sector, quality infrastructure and development cooperation sphere. The aim of the AfPQ is to improve product quality in African partner countries so that African companies meet the demands of regional and international buyers, penetrate new, often niche markets, thus increasing exports and value creation. On behalf of the Federal Ministry for Economic Cooperation and Development (BMZ) the AfPQ is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

Biovision Africa Trust with funding from GIZ is coordinating implementation of the project Alliance for Product Quality in Africa (AfPQ) with specific focus on strengthening regional trade through East African Organic Product Standard (EAOPS) in three countries of Kenya, Uganda, and Tanzania. In Kenya, the AfPQ is being implemented by Kenya Organic Agriculture Network (KOAN) in Kenya, in Uganda, by National Organic Agricultural Movement of Uganda (NOGAMU) and in Tanzania, by Tanzania Organic Agriculture Movement (TOAM).

The goal of the project is to stimulate and promote inter-regional trade in East Africa by facilitating the adoption and sustainable use of the East African Organic Product Standard (EAOPS) in Kenya, Tanzania, and Uganda. Product standards play a key role in stimulating trade via flow of goods, services, and investments across borders by fostering transparency, reducing technical barriers, and enhancing market access.

In strengthening regional trade, this project aims to contribute to four main outputs and targets, namely:

i. Eastern Africa organic regional trade by African companies trading with themselves strengthened: It is anticipated that 48 companies from Kenya, Uganda and Tanzania would have exploited export opportunities, mostly within the arrangement of the EAC possibly COMESA, and at a later stage, AfCFTA framework.

ii. Capabilities of East African companies and farmer groups to use the EAOPS enhanced: It is anticipated that the 48 companies from Kenya, Uganda and Tanzania will be in full compliance of conducting trade with EAOPS within the region.
iii. Compliance for EAOPS by company employees and farmers facilitating trade enhanced: The project aims to have at least 48 employees/farmers, including 24 women, from Kenya, Uganda and Tanzania demonstrate compliance with EAOPS in their trade transactions.
iv. National bodies facilitate regional organic trade through improved services: The 3 national organic associations in Kenya, Uganda and Tanzania offer improved services to facilitate trade based on EAOPS certification to its members.

Biovision Africa Trust (BvAT) sought to understand the current usage of the East Africa Organic Products Standard (EAOPS) among companies in Kenya, Uganda, and Tanzania. To achieve this, BvAT is commissioned a baseline study to document companies actively trading in the organic sector, including those in conventional markets that may be interested in expanding into organic products. The study focused on identifying companies trading in Kenya and within the East African region, with a particular interest in those that have the potential to scale their operations and reach wider markets in the region.

The study documented the companies' growth stages, outputs, and development in terms of infrastructure and personnel. Additionally, the study assessed each company's contribution to the local and national economy, their readiness for export, and their usage of the EAOPS and other organic standards, challenges and opportunities faced by these companies, including trade barriers, and provided recommendations on how to enhance their capacity to serve both domestic and export markets effectively.

1.1.1 Contextual analysis

Introduction

Organic agriculture (OA) is defined by the East African Organic Products Standard (EAS 456:2007) as "a holistic production management system, which promotes and enhances agro-ecosystem health, including biodiversity, biological cycles and soil biological activity" and seeks "to minimize the use of external inputs, avoiding the use of synthetic drugs, fertilizers and pesticides" while optimizing "the health and productivity of interdependent communities of soil life, plants, animals and people" (East African Community, 2007, Introduction, pp. iii)[3].

The International Federation of Organic Agricultural Movements (IFOAM) further describes organic agriculture as "a whole-system approach based upon sustainable ecosystems, safe food, good nutrition, animal welfare and social justice," emphasizing that it is "more than a system of production that includes or excludes certain inputs" and delivers broad economic, environmental, social, and cultural benefits (IFOAM, 2005, pp.8).[4]

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[3] East African Community. (2007). *EAS 456:2007 East African Organic Products Standard*. https://law.resource.org/pub/eac/ibr/eas.456.2007.pdf

[4] International Federation of Organic Agriculture Movements. (2005). *The iFOAM Basic standards for organic production and processing* (Version 2005). https://agritech.tnau.ac.in/org_farm/pdf/IFOAM_basic_standards.pdf

IFOAM 2007[5] indicates that organic agriculture is based on four key principles as follows;

i. Principle of Health: Organic agriculture should sustain and enhance the health of soil, plant, animal, human and planet as one and indivisible.
ii. Principle of Ecology: Organic agriculture should be based on living ecological systems and cycles, work with them, emulate them and help sustain them.
iii. Principle of Fairness: Organic agriculture should build on relationships that ensure fairness with regard to the common environment and life opportunities.
iv. Principle of Care: Organic agriculture should be managed in a precautionary and responsible manner to protect the health and well-being of current and future generations and the environment

According to the UNEP-UNCTAD Task Force (UNEP-UNCTAD, 2008) [6], organic agriculture offers a multifaceted pathway to bolstering long-term food security by not only increasing the quantity of food available, but by strengthening the very foundations upon which sustainable farming depends. Unlike conventional systems that often emphasize short-term yield gains through high levels of external inputs, organic systems work with ecological processes to rebuild and diversify the resource base—what the UNEP-UNCTAD Task Force describes as the five "capital assets" essential for success: natural, social, human, physical and financial capital.,

At the heart of organic agriculture's contribution to food availability is its capacity to raise and stabilize yields over time, especially in regions where synthetic inputs have historically been scarce or degraded soils and watersheds have lost resilience. During the initial transition from conventional or low-input farming to organic management, farmers may observe a temporary dip in output; however, as soil biology recovers and agro-ecosystems mature, yields rebound—often matching or exceeding previous levels—and in some documented cases even doubling production (Altieri 2002; Pretty 2003)[7,8]. The 2008 UNEP-UNCTAD Task Force noted that in 11 of 13 African case studies, food availability rose following organic conversion, reflecting better water retention, improved nutrient cycling, and enhanced pest and disease regulation that underpin more reliable harvests and enable cultivation further into the dry season. Moreover, because most smallholders consume the bulk of what they grow, even modest gains directly translate into greater household food security and improved dietary diversity.

Organic agriculture's reliance on five capital assets ensures that these productivity gains are durable and equitable. Natural capital is rebuilt through practices such as compost application, agroforestry, and terracing, which increase soil organic matter, biodiversity and water-holding capacity. Social capital grows as farmers form cooperatives and resource-management groups, sharing knowledge and pooling labour and certification costs, a dynamic that is

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[5] International Federation of Organic Agriculture Movements. (2007). *The Principles of Organic Agriculture*. IFOAM – Organics International. Retrieved July 6, 2025, from https://www.ifoam.bio/why-organic/shaping-agriculture/four-principles-organic

[6] UNEP-UNCTAD Capacity Building Task Force on Trade, Environment and Development (CBTF) (2008). Organic Agriculture and Food Security in Africa. https://unctad.org/system/files/official-document/ditcted200715_en.pdf

[7] Altieri M A. 2002. Non-certified agriculture in developing countries. In Scialabba N E H and Hattam C (eds.), *Organic Agriculture, Environment and Food Security*. FAO, Rome.

[8] Pretty J. 2003. Social capital and the collective management of resources. *Science*, 302, 1912–1915.

particularly important in areas where communal labour and local markets determine access to food. Human capital is enhanced by farmers' learning to diagnose soil and plant health, experiment with local crop varieties and refine techniques, boosting both technical know-how and community resilience. Physical capital benefits from the reinvestment of surplus revenues into infrastructure—roads, storage facilities and market linkages—that ease access to inputs and outlets for organic produce. Finally, financial capital is strengthened through cost savings on synthetic agrochemicals, the capture of premium market prices, and the ability to reinvest profits locally rather than service high-interest input loans. (UNEP-UNCTAD, 2008)

Global status of organic agriculture

According to the 2024 FiBL & IFOAM – Organics International survey[9], (**Table 1**) between 2021 and 2022, the global area managed under organic standards surged from approximately 76.1 million hectares to 96.4 million hectares, a one-year increase of 20.3 million hectares, or 26.6 percent. Over the past decade (2012–2022), the survey noted that the organic estate has more than doubled, expanding by 53.3 million hectares (123.9 percent), yet these headline figures mask striking regional contrasts in both short- and long-term growth.

Table 1: *World: Organic agricultural land (including in-conversion areas) by region: growth 2021 to 2022, and 10-year growth*

Region	Organic agri. Land 2021	Organic agri. Land 2022	Share of total [%]	Growth			
				1-year [ha]	1-year [%]	10-year [ha]	10-year [%]
Africa	2,607,489	2,735,006	2.8	127,518	4.9	1,531,669	127.3
Asia	6,496,002	8,830,990	9.2	2,334,989	35.9	5,440,949	160.5
Europe	18,258,903	18,450,355	19.1	191,452	1.0	7,081,206	62.3
Latin America	9,484,391	9,537,387	9.9	52,996	0.6	2,825,835	42.1
North America	3,276,330	3,627,818	3.8	351,488	10.7	580,109	19.0
Oceania	35,985,809	53,194,639	55.2	17,208,830	47.8	35,872,906	207.1
World*	**76,108,924**	**96,376,196**	**100.0**	**20,267,272**	**26.6**	**53,332,674**	**123.9**

Source*: FiBL survey 2024, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 335. * Total includes correction value for French Overseas Departments*

The survey further noted that organic land in Africa rose by 127,518 hectares (a 4.9 percent increase) to reach 2.7 million hectares in 2022, representing 2.8 percent of the global total. Over ten years, the continent's organic footprint more than doubled, gaining some 1.5 million hectares (127.3 percent), reflecting growing engagement from smallholder schemes and commercial exporters of high-value crops such as coffee, cocoa, and horticultural produce. Asia experienced an even more dramatic jump, adding 2.33 million hectares in a single year (+35.9 percent) to total 8.83 million hectares, or 9.2 percent of the world's organic land. Over ten years, Asia's organic acreage has increased by 5.44 million hectares (160.5 percent), driven by large-scale conversions in India, which is now the second largest organic producer after Australia, as well as supportive policies and rising domestic demand in China, Indonesia, Kazakhstan, and beyond. (FiBL & IFOAM, 2024)

[9] FiBL & IFOAM – Organics International. (2024). *The world of organic agriculture: Statistics and emerging trends 2024*. https://www.fibl.org/fileadmin/documents/shop/1747-organic-world-2024_light.pdf

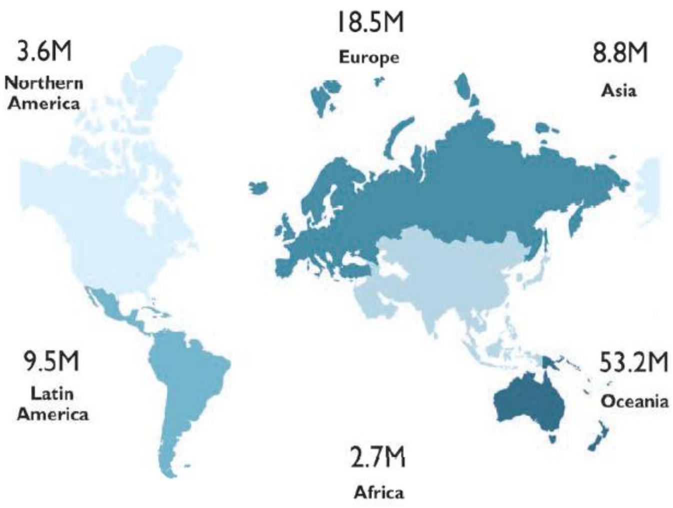

Figure 1: Share of organically grown areas in the Utilised Agricultural Area (UAA) by continent in 2022 (Source: 2024 FiBL Survey)

According to the survey (**Figure 1)**, Europe remains the second-largest global holder of organic farmland at 18.45 million hectares (19.1 percent of the world total), having added 7.08 million hectares (+62.3 percent), over the past decade. Latin America's organic area, 9.54 million hectares, or 9.9 percent of the global total, grew marginally by 0.6 percent (+52,996 hectares) in 2021–2022 and has expanded 42.1 percent (+2.83 million hectares) over ten years. In North America, the organic land base rose by 351,488 hectares (+10.7 percent) to 3.63 million hectares (3.8 percent of the world total), while Oceania, overwhelmingly led by Australia's vast certified grazing estates, accounts for 55.2 percent of the global organic area at 53.2 million hectares. (FiBL & IFOAM, 2024)

Worldwide, the 2024 FiBL Survey further reveals that the share of the world's agricultural land that is organic was 2.0 percent in 2022. A look at the range of share of agricultural land under organic farming from one continent to the other shows that Oceania has remained the continent with the highest organic share (**Figure 2**)[10]. In 2022, organic farming remained a niche practice in most continents with Oceania leading the way, with 14.3% of its Utilised Agricultural Area under organic production. (FiBL & IFOAM, 2024)

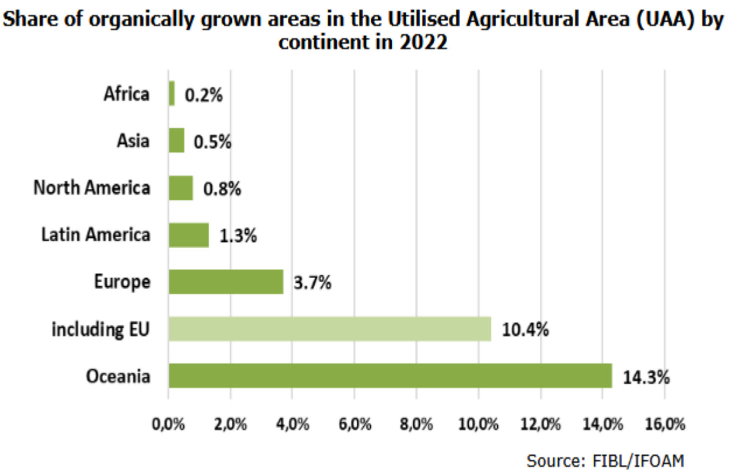

Figure 2: Share of organically grown areas in the Utilised Agricultural Area (UAA) by continent in 2022

The European Union also showed strong uptake, with just over one in ten hectares (10.4%) certified organic, while Europe as a whole, including non-EU countries, had 3.7% of its farmland managed organically. In Latin America, organic land accounted for 1.3% of the total agricultural area, followed by North America at 0.8% and Asia at 0.5%. Africa registered the smallest share, with only 0.2% of its utilised agricultural area[11] under organic cultivation. (FiBL & IFOAM, 2024)

[10] Organic Sector Worldwide International publication by Agence BIO 2024 Edition

[11] Utilised agricultural area (UAA) is the area utilised for farming, which includes all the area of arable land, permanent meadow and pasture, and land developed to permanent crops and kitchen gardens. https://www.un.org/esa/sustdev/natlinfo/indicators/methodology_sheets/land/organic_farming.pdf

These figures highlight both the regional leaders and the significant room for growth in global organic agriculture.

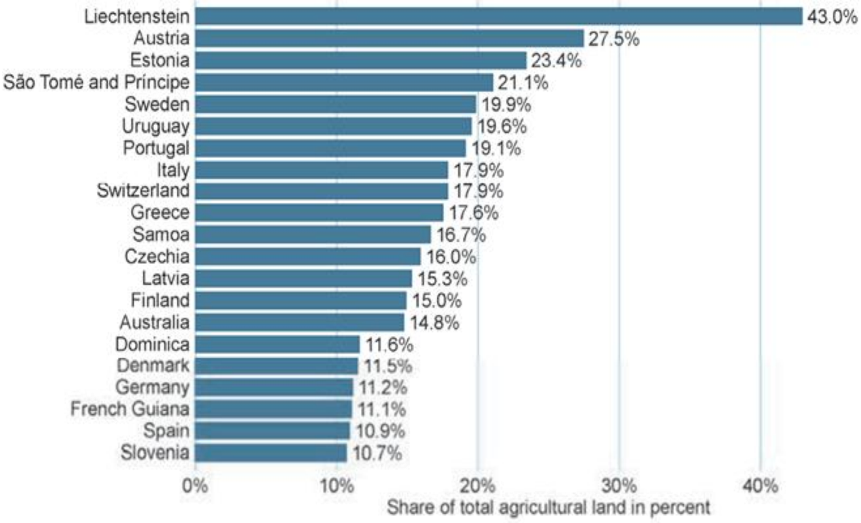

Figure 3: *Countries with an organic share of the total agricultural land of at least 10 percent (**Source**: FiBL survey 2024, based on information from the private sector, certifiers, and governments.)*

Further, the survey notes that many individual countries, however, have a much higher organic share and in 21 countries, 10 percent or more of the agricultural land is used for organic production, with most of these countries in Europe. The country with the highest organic share was Liechtenstein, with 43 percent of its agricultural land under organic management. **(Figure 3)**. (FiBL & IFOAM, 2024)

According to Agence Bio (2024)[12], the global organic food market has grown more than nine-fold between 1999 and 2022, rising from roughly €15 billion to nearly €141 billion, an estimated expansion of about 7% compared to 2021 (**Figure 4**). Throughout this period the European Union remained the single largest regional contributor, growing from just under €5 billion in 1999 to almost €50 billion by 2022. North America followed, climbing from around €4 billion to some €70 billion over the same span. Meanwhile, Asia's organic market accelerated from negligible levels in the early 2000s to about €15 billion in 2022. Other European countries and Latin America each built modest niches (reaching approximately €10 billion and €5 billion, respectively), while Oceania and Africa remained small contributors under €5 billion combined. The grey "rest of world" segment also expanded steadily, reflecting uptake in a growing number of markets. Overall, the chart underlines both the sustained leadership of the EU and

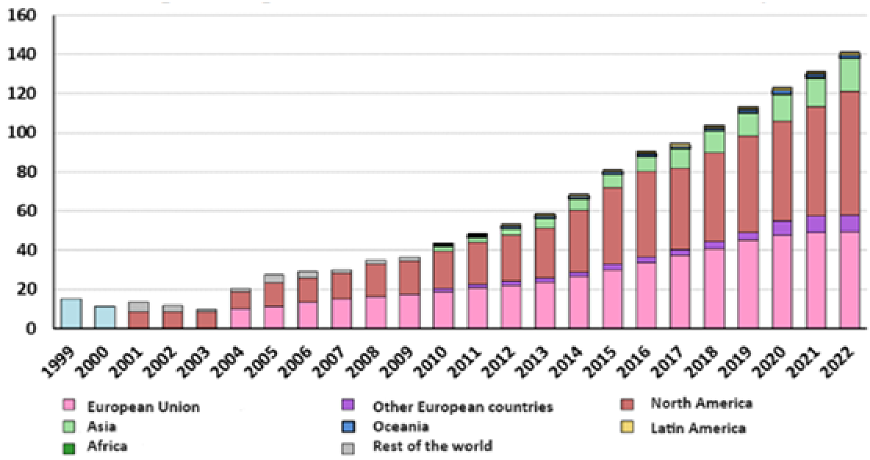

Figure 4: *Evolution of the global organic food market between 1999 and 2022 (in Euros billions)*

[12] Agence Bio (2024). *Organic Sector Worldwide*. 2024 Edition. https://www.agencebio.org/wp-content/uploads/2024/07/Organic-Worldwide-2024.pdf

North America and the emergence of Asia and other regions as important drivers of the organic sector's nine-fold growth.

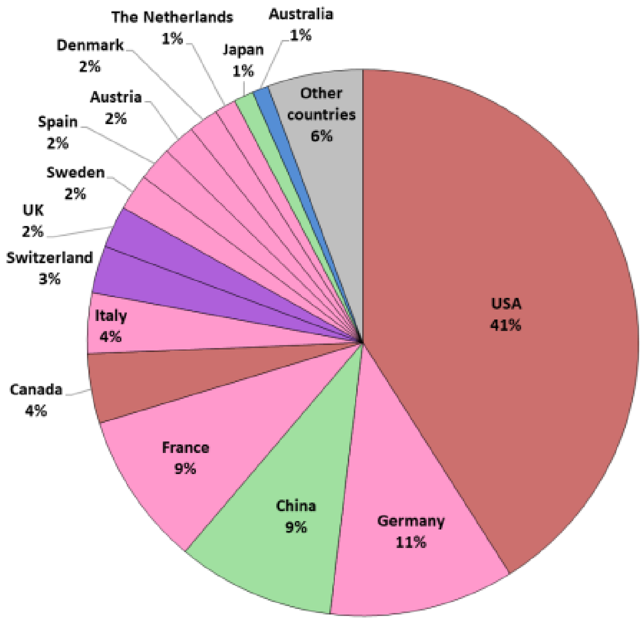

***Figure 5:** Main organic markets in 2022 (**Source**: Agence Bio, 2024 Edition.)*

In line with the above estimates on the organic food and drinks market, Agence Bio (2024) further documented that the global organic market remained heavily dominated by a handful of major economies in 2022, with the United States accounting for by far the largest share at 41 percent (**Figure 5**). Germany followed at 11 percent, while China and France each held roughly 9 percent of global organic sales. Together, these four markets alone represented almost three-quarters of world demand for certified organic products. Beyond them, Canada and Italy each commanded about 4 percent of the market, and Switzerland contributed another 3 percent. The United Kingdom, Sweden, Spain, Austria, and Denmark each accounted for around 2 percent apiece, reflecting steady but more modest levels of organic consumption. Smaller markets such as the Netherlands, Japan, and Australia each made up just 1 percent of the total, and a diverse group of "other countries" collectively comprised the remaining 6 percent. This concentration highlights the outsized influence of North American and key European markets, alongside rapidly growing demand in China, on the global organic sector.

Developments in Organic Agriculture in Africa

The transition of agriculture and food systems in Africa towards ecological organic agriculture (EOA) has increasingly gained momentum in response to global challenges such as health crises, geopolitical tensions, and environmental degradation. Amudavi et al. (2025)[13] highlight that various stakeholders, including farmers, researchers, policymakers, and development practitioners, recognize EOA as a viable approach to enhance food security, improve nutritional outcomes, restore degraded lands, mitigate climate change, and boost resilience across agricultural systems. This growing recognition was underscored at the 1st Eastern Africa Agroecology Conference (EAAC) in March 2023, where significant advancements in organic policy adoption, especially in Uganda and Tanzania, were showcased, laying a robust foundation for further regional and continental development efforts as exemplified by ongoing

[13] Amudavi, D. M., Wambua, V., Mutungi, A., Namuwoza, C., Daud, M., Adeoluwa, O. O., Ologundudu, O. M., & Nsanga, F. (2025). Developments in organic agriculture in Africa. In FiBL & IFOAM – Organics International, *The world of organic agriculture: Statistics and emerging trends 2025* (pp. 128–139). FiBL & IFOAM – Organics International. https://www.fibl.org/fileadmin/documents/shop/1797-organic-world-2025.pdf

initiatives such as the African Union Ecological Organic Agriculture Initiative (EOA-I) (FiBL & IFOAM, 2025).

Amudavi et al. (2025) further notes that organic agriculture in Africa has seen significant advancements driven by the African Union Ecological Organic Agriculture Initiative (EOA-I), highlighting the continent's commitment to transitioning to productive, resilient, and healthy agricultural systems. EOA-I, supported by various international development agencies, has reached approximately 2.8 million smallholder farmers (45% women, 55% men) with essential knowledge to adopt Ecological Organic Agriculture (EOA) practices. This initiative has considerably increased organic farming adoption, with around 88.9% of targeted smallholder farmers incorporating organic methods into their agricultural practices by 2024, greatly exceeding initial targets.

EOA has enhanced agricultural productivity, improved soil fertility, increased resilience against climate shocks, and positively impacted nutritional security. Around 86% of agricultural land under EOA project areas transitioned to organic methods, far surpassing initial expectations. Moreover, Participatory Guarantee Systems (PGS) have significantly grown, enabling nearly a thousand farmers in 32 groups across the continent to access markets for certified organic products in a cost-effective and collaborative manner. (Amudavi et al., 2025)

Additionally, policy integration has also accelerated, with EOA elements incorporated into 19 national policies and 18 agricultural programs across nine African countries. At the continental level, EOA-I actively participates in strategic policy frameworks such as the CAADP Post Malabo agenda and the Nairobi Declaration on soil health, reinforcing its crucial role in shaping resilient, sustainable agrifood systems across Africa. (Amudavi et al., 2025)

Organic Agriculture in Kenya

The history and current status of organic agriculture in Kenya represent a narrative of agricultural evolution, societal adaptation, and environmental consciousness. The establishment of organic agriculture in Kenya can be traced back to the 1980s when local farmers began adopting practices that prioritize environmental sustainability and soil health. This early adoption laid the groundwork for the organic farming sector that has since gained significant momentum, influenced by both global trends and local needs (Tankam & Djimeu, 2019)[14].

Although Kenya lacks official policies specifically for Ecological Organic Agriculture (EOA), public interest and recognition of organic agriculture have steadily increased. The sector has expanded without explicit governmental policy support. Currently, the Ministry of Agriculture maintains an Organic Desk under the Department of Food Security and Early Warning Systems, tasked with spearheading the development of an organic agriculture policy. For the past two decades, the ministry has aimed to create a dedicated organic policy integrated within broader agricultural, food security, and environmental policies (BvAT, 2021).[15]

[14] Tankam, C. and Djimeu, E. W. (2019). Organic farming for local markets in Kenya: contribution of conversion and certification to environmental benefits. Canadian Journal of Agricultural Economics/Revue Canadienne d'Agroeconomie, 68(1), 83-105. https://doi.org/10.1111/cjag.12209

[15] Biovision Africa Trust (BvAT). (2021). *Ecological Organic Agriculture Policy Brief for Kenya.* Retrieved from https://biovisionafricatrust.org/wp-content/uploads/2022/12/Kenya-policy-brief.pdf

Despite the lack of an official policy on organic agriculture, the 2023 Kenya Organic Data Survey[16] reveals a dynamic and rapidly evolving organic sector with long-term trends showing a remarkable doubling of Kenya's organic area over the past decade. From 84,538 ha in 2007, certified organic land rose steadily—spiking during 2012–13 and 2014–15 expansions—to reach 171,298 ha by 2022. At the time of the survey, Kenya's organic market offered 347 distinct products, spanning six main categories. Fresh vegetables dominate (222 products), followed by fruits (49), cereals (19), processed foods (34), herbs (15), and meat and milk items (8).

Further, the survey highlighted the role of certification data on the scale of organized organic production: under third-party schemes (CERES, Control Union, ECOCERT), 62,626 farmers cultivate 171,298 acres, while the Participatory Guarantee System (PGS) covers 1,634 farmers on 2,520 acres. ECOCERT leads third-party certification with 33,453 farmers on 90,284 acres, followed by Control Union (29,082 farmers; 80,763 acres) and CERES (91 farmers; 251 acres). PGS, by contrast, provides a low-cost route for smallholders to certify smaller plots, reinforcing community-based stewardship of natural resources.

In the domestic market, the report stated that organic sales volume totalled 172,760 kg in 2022, driven largely by retail aggregators (130,853 kg), with smaller contributions from Muranga (19,121 kg), Kikuyu (13,800 kg) and Gilgil (8,986 kg) farming groups. These volumes generated KES 7.52 million in value: retail outlets accounted for KES 5.53 million, Muranga farmers KES 0.99 million, Kikuyu KES 0.82 million, and Gilgil KES 0.18 million. Top value-generating crops include sweet potato (KES 502,000), butternut (KES 420,000) and arrowroot (KES 410,000), reflecting both consumer preference and yield economics. Similarly, the number of organic farms climbed from 8,004 in 2007 to 62,626 in 2022. Surge periods around 2013–14 and 2020–21 corresponded with intensified certification outreach and rising consumer demand.

The early stages of the organic farming movement in Kenya were marked by significant challenges. Tikon et al. (2023) [17] highlight these including inadequate market access. Many smallholders struggle to find dependable markets for their organic produce, which can dissuade them from pursuing certification and transitioning to organic farming altogether. The high costs and unavailability of organic inputs severely constrained smallholder farmers' ability to transition to organic practices. This was compounded by a general lack of awareness and understanding among farmers regarding organic farming methods, which hampered adoption rates. The authors also emphasize that consumer understanding of organic products and their benefits needs to improve to foster greater demand and support for organic farming initiatives.

However, the role of non-governmental organizations (NGOs) has been pivotal in promoting organic practices by providing training and resources to smallholder farmers. These organizations foster social networks among farmers, facilitating the spread of knowledge and

[16] Kenya Organic Agriculture Network (KOAN) (2024). *Kenya Organic Data Survey.* https://koan.co.ke/wp-content/uploads/2024/05/2024-Kenya-Organic-Data-Survey-Report.pdf

[17] Tikon, F. U., DAVID, A., Gadu, H. O., & Apeh, C. C. (2023). Adoption and challenges associated with organic farming in bogoro local government area, bauchi state, nigeria. Journal of Agripreneurship and Sustainable Development, 6(2), 132-139. https://doi.org/10.59331/jasd.v6i2.442

techniques essential for successful organic farming (Goldberger, 2008)[18]. By leveraging social organization, particularly among women and self-help groups, organic farming has been integrated into local communities as an alternative to conventional methods, seeking to improve food security and sustainable livelihoods.

As the technology landscape evolved, the integration of traditional knowledge with modern agricultural practices became more pronounced. Assessments of organic farms demonstrated that they often performed better in terms of sustainability metrics compared to their conventional counterparts. A study indicated that organic farms enhanced economic resilience, social well-being, and environmental integrity, suggesting that organic agriculture could be a viable model for sustainable rural development in Kenya (Kamau et al., 2021)[19]. The significance of agro-biodiversity was also emphasized as traditional farming practices preserved diverse food plant species that greatly contributed to food security (Ngendo et al., 2015).

The challenges of climate change have increasingly influenced agricultural practices in Kenya, necessitating adaptations such as organic farming. The Ricardian approach to assessing the economic impact of climate on agricultural productivity revealed that organic techniques could buffer adverse climate effects by improving soil fertility and reducing reliance on chemical fertilizers Kabubo-Mariara & Karanja, 2007[20]). This is further supported by studies indicating that long-term organic farming practices lead to better resilience against the impacts of climate change compared to conventional methods, highlighting their relevance in future agricultural policies (Anyango et al., 2020[21]; , Kabubo-Mariara & Karanja, 2007). Comparative studies between organic and conventional farming practices demonstrate that organic methods can enhance soil microbial diversity, which is critical for plant health and sustainability (Gitonga et al., 2021; Anyango et al., 2020). Investigations conducted in specific regions like the Central Highlands indicate that organic farming systems contribute to better environmental outcomes and foster ecological resilience (Karanja et al., 2020). Nevertheless, challenges remain, as studies note that many smallholder farmers still depend heavily on manure as their primary organic input, which often falls short of meeting crop nutrient demands (Mugwe et al., 2009)[22].

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[18] Goldberger, J. R. (2008). Diffusion and adoption of non-certified organic agriculture: a case study from semi-arid Makueni district, Kenya. Journal of Sustainable Agriculture, 32(4), 531-564. https://doi.org/10.1080/10440040802257371

[19] Kamau, J. W., Schader, C., Biber-Freudenberger, L., Stellmacher, T., Amudavi, D. M., Landert, J., … & Borgemeister, C. (2021). A holistic sustainability assessment of organic (certified and non-certified) and non-organic smallholder farms in Kenya. Environment, Development and Sustainability, 24(5), 6984-7021. https://doi.org/10.1007/s10668-021-01736-y

[20] Kabubo-Mariara, J. and Karanja, F. K. (2007). The economic impact of climate change on Kenyan crop agriculture: a ricardian approach. Global and Planetary Change, 57(3-4), 319-330. https://doi.org/10.1016/j.gloplacha.2007.01.002

[21] Anyango, J. J., Bautze, D., Fiaboe, K. K. M., Lagat, Z. O., Muriuki, A., Stöckli, S., … & Adamtey, N. (2020). The impact of conventional and organic farming on soil biodiversity conservation: a case study on termites in the long-term farming systems comparison trials in Kenya. BMC Ecology, 20(1). https://doi.org/10.1186/s12898-020-00282-x

[22] Mugwe, J. N., Mugendi, D., Mucheru-Muna, M., Merckx, R., Chianu, J., & Vanlauwe, B. (2009). Determinants of the decision to adopt integrated soil fertility management practices by smallholder farmers in the central highlands of Kenya. Experimental Agriculture, 45(1), 61-75. https://doi.org/10.1017/s0014479708007072

Moreover, the landscape of organic agriculture in Kenya continues to evolve with increased government initiatives aimed at bolstering organic standards and certifications, thereby improving market access for organic products both locally and internationally (Kamau et al., 2021). The Kenyan government has implemented several policies and frameworks aimed at promoting organic farming, facilitating access to both local and international markets for organic produce. Mureithi (2023)[23] details how these initiatives reflect a significant shift towards enhancing food security and building resilience within local communities. The government's proactive efforts through policy development have created an enabling environment that empowers farmers to adopt organic practices, aligning them with the emerging preferences of consumers who increasingly demand sustainably produced foods.

One notable aspect highlighted by Mureithi is the establishment of certification programs designed to help farmers meet international organic standards. These programs not only increase the legitimacy of Kenyan organic products in global markets but also enhance the marketability of these items within local markets. By fostering skills development and providing the necessary resources for farmers to transition to organic methods, these government initiatives support economic growth among smallholder farmers who might otherwise be marginalized. The Kenyan government's approach includes partnerships with certification bodies to enhance the credibility of organic products on the global stage. This collaborative effort recognizes that the success of organic agriculture hinges not only on production practices but also on farmers' ability to navigate the complexities of global organic standards (Sherief et al., 2021; Nanyunja et al., 2015). This is particularly evident in the emphasis on local cooperatives, which can pool resources to facilitate the certification process for individual farmers, thus improving collective bargaining power in the market (Asfaw et al., 2010).

Mureithi also points out that the establishment of cooperative societies plays a crucial role in this landscape. These cooperatives help pool resources, share knowledge, and facilitate collective certification efforts, which lower the financial and logistical burdens associated with the certification process. By working collectively, farmers can increase their competitiveness in both local and international markets, ultimately driving higher incomes and bolstering food security.

Despite these advancements, the adoption of organic farming in Kenya has indeed been characterized by variability among farmers due to several factors, including economic pressures, limited resources for certification, and intense market competition. Tankam and Djimeu Tankam & Djimeu (2019) emphasize that economic factors play a crucial role in the decision-making processes of farmers. Their findings reveal that many farmers face considerable financial pressures that make it challenging to invest in organic inputs and certification processes, especially when conventional farming practices may appear more immediately profitable. Moreover, high costs associated with transitioning to organic practices, including obtaining necessary certifications, deter many smallholders from making the switch.

In their research, Mugwe et al. Mugwe et al. (2009) highlight that limited resources significantly influence a farmer's ability to adopt integrated approaches that could lead to organic farming adoption. They point out that manure is the most widely used organic fertilizer by approximately 80% of households in the Central Highlands of Kenya; however, it is often

[23] Mureithi, A. M. (2023). Sustainable agricultural practices among rural youth in Kenya: a study of attitudes and behaviours. Journal of Agriculture, 7(1), 45-55. https://doi.org/10.53819/81018102t2165

insufficient to meet crop nutrient requirements. The scarcity of organic inputs and resources continues to be limiting factors for many farmers in this region, even where the potential for organic farming is considerable.

Furthermore, competition in the market presents another challenge. Vamba et al. Vamba et al. (2023)[24] discuss how market dynamics and competition among farmers can influence adoption decisions. In their case study on mango farmers in Makueni County, they found that competition significantly affects farmers' choices regarding the farming methods they adopt, with conventional farming often viewed as more reliably profitable in the short term. This competitive pressure can dissuade farmers from pursuing organic certifications, as the immediate economic benefits of conventional practices may overshadow potential long-term advantages of organic farming.

Organic agriculture in Uganda

In Uganda, organic agriculture has been shaped by historical contexts, socio-economic factors, and the roles of various stakeholders. Initially, organic agriculture gained momentum during the post-war period between 1986 and 1993, primarily facilitated by pioneering individuals and non-governmental organizations (NGOs) such as Kulika, which provided essential training and support for local farmers (Hauser & Lindtner, 2016). These initiatives not only fostered the emergence of organic farming practices but also highlighted the importance of knowledge management and capacity building among extension workers and farmers, enabling them to adopt and optimize organic methods effectively (Hauser & Lindtner, 2016)[25].

As agriculture in Uganda constitutes a substantial portion of the nation's economy, engaging approximately 68% of the population (Bamwesigye et al., 2020[26];, the push towards organic farming aligns well with broader agricultural policies aimed at enhancing sustainability and reducing dependency on chemical inputs. Moreover, this transformation has been bolstered by the recognition of organic agriculture's potential to enhance food security and promote biodiversity (Bongers et al., 2015)[27]. For instance, research indicates that farmers managing coffee farms as intensive-organic systems may experience better financial outcomes compared to those adhering to conventional practices reliant on pesticide use (Munyuli, 2014)[28].

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[24] Vamba, M. K., Kibutu, T., & Musau, J. (2023). Devolution of agriculture and its effects on mango marketing by small-scale farmers in Makueni county, Kenya. East African Journal of Agriculture and Biotechnology, 6(1), 271-284. https://doi.org/10.37284/eajab.6.1.1326

[25] Hauser, M. and Lindtner, M. (2016). Organic agriculture in post-war Uganda: emergence of pioneer-led niches between 1986 and 1993. Renewable Agriculture and Food Systems, 32(2), 169-178. https://doi.org/10.1017/s1742170516000132

[26] Bamwesigye, D., Doli, A., Adamu, K. J., & Mansaray, S. K. (2020). A review of the political economy of agriculture in uganda: women, property rights, and other challenges. Universal Journal of Agricultural Research, 8(1), 1-10. https://doi.org/10.13189/ujar.2020.080101

[27] Bongers, G., Fleskens, L., Ven, G. v. d., Mukasa, D., Giller, K., & Asten, P. v. (2015). Diversity in smallholder farms growing coffee and their use of recommended coffee management practices in uganda. Experimental Agriculture, 51(4), 594-614. https://doi.org/10.1017/s0014479714000490

[28] Munyuli, B. M. T. (2014). Social and ecological drivers of the economic value of pollination services delivered to coffee in central Uganda. Journal of Ecosystems, 2014, 1-23. https://doi.org/10.1155/2014/298141

Uganda has emerged as one of Africa's foremost organic producers and exporters, supplying key markets in the European Union, the United States, Japan, and elsewhere. In the 2017/18 fiscal year, organic agriculture accounted for roughly 17.1 percent of Uganda's total agricultural export earnings, which amounted to USD 291.2 million (MoFPED, 2017/18). While up-to-date breakdowns by crop are limited, the 2019 National Organic Agriculture Policy reports that in 2009/10 the country's top organic export by volume was coffee at 3,451.7 metric tonnes, followed by cocoa (2,914.8 t), sesame (2,160 t), cotton (1,689.5 t), fresh fruits (1,501.9 t) and dried fruits (115.6 t). Smaller but notable exports included bird's eye chilies (101 t), vanilla (99.3 t), organic garments (81,153 pieces), shea nuts (54 t) and frozen fruit pulp (8.26 t). Overall export revenues from organic products reached USD 56.9 million in 2016 and USD 50 million in 2018.[29]

The 2023 Uganda Organic Data Survey confirms significant growth and potential within Uganda's organic agriculture sector. Certified organic farmland increased steadily from 264,480 hectares in 2018 to 505,308 hectares by 2021, reflecting growing interest and adoption among smallholder farmers. The total value of organic agricultural exports also rose notably from USD 123.3 million in 2018 to USD 159.8 million in 2021, with projections indicating it could reach USD 174 million by the end of 2022. Uganda's organic export market primarily includes countries within the EU, the USA, Japan, and regional neighbors like Kenya and Rwanda. Notably, the number of certified organic operators grew significantly, with 404,246 smallholder producers certified by 2021, a considerable increase from 211,584 in 2018. Certification is predominantly conducted by five key certifiers: Ceres, Ecocert, Control Union, Ugocert, and OneCert. Additionally, there has been substantial growth in organic processors, increasing from 44 in 2018 to 116 in 2021, and exporters, rising from 43 to 78 within the same period. The Participatory Guarantee System (PGS), a community-based certification approach, has grown to cover 25% of certified smallholder farmers, reflecting increasing adoption and support for cost-effective organic certification options.

The policy landscape for supporting organic agriculture in Uganda has evolved significantly, primarily driven by governmental initiatives and the integration of organic practices into national agricultural strategies. One notable aspect of policy development in Uganda is the proactive stance the government has taken towards organic agriculture, as evidenced by the publication of the "Draft of Uganda Organic Agriculture Policy" in 2009 (Jung, 2023)[30]. This policy serves as a foundational framework that delineates the Uganda government's commitment to promoting organic agriculture not only as a viable agricultural practice but also as a means to enhance food security and rural livelihoods. The policy emphasizes sustainable practices while addressing market access and certification challenges faced by organic farmers (Jung, 2023).

In recent years, the implementation of agricultural extension programs has also played a crucial role in supporting the transition to organic farming. The National Agricultural Advisory Services (NAADS) program has been instrumental in enhancing agricultural productivity through training and knowledge dissemination, directly impacting organic farming practices

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29 Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH (2022). Sector Brief Uganda: Organic Agriculture. https://www.giz.de/de/downloads/SectorBrief_Uganda_Organic-Agriculture.pdf

30 Jung, S. (2023). Impact analysis of organic certification subsidy on economic welfare in Uganda. Journal of International Development Cooperation, 18(1), 63-82. https://doi.org/10.34225/jidc.2023.18.1.63

(Benin et al., 2010)[31]. However, studies highlight that there are significant gender disparities within extension services, which can limit the effective reach of these policies among female farmers who make up a substantial part of the agricultural workforce (Benin et al., 2010). Efforts to include women in agricultural policymaking and training programs have become increasingly recognized as critical for the success of these initiatives (Twinomuhangi et al., 2019)[32].

Climate change has compelled the integration of organic practices into broader agricultural policies in Uganda. Research indicates that local policies have begun to facilitate adaptation opportunities for smallholder farmers to cope with climate change impacts by embracing organic and sustainable agricultural practices (Twinomuhangi et al., 2019). These adaptations are necessary as Uganda's agricultural productivity is vulnerable to climatic variability, necessitating views that favor ecological agriculture strategies over conventional practices that rely heavily on inputs that may exacerbate environmental degradation (Sridharan et al., 2019)[33].

The engagement of various stakeholders, including NGOs and cooperatives, has been pivotal in promoting organic practices at the community level in Uganda. Many local organizations work to empower farmers through education about organic methods and financial incentives for adopting sustainable agriculture, directly supporting government initiatives aimed at fostering organic farming (Hauser & Lindtner (2016)[34]) and helping farmers overcome barriers such as access to organic certification and organic markets (Ampaire et al., 2024). In this sense, grassroots movements complement formal governmental policies by improving awareness and accessibility of organic practices among rural communities.

Thus, the influence of NGOs and stakeholders advocating for organic practices has been a significant factor in advancing organic agriculture education in Uganda. For example, the efforts of organizations like Kulika, which focus on training farmers and providing support for organic initiatives, have motivated academic institutions to incorporate these principles into their teaching and research agendas (Hauser & Lindtner, 2016). This grassroots movement encouraged universities to adapt their curricula in response to real-world agricultural practices and challenges faced by local farmers.

As organic agriculture gained traction in the late 1990s and early 2000s, Ugandan universities recognized the necessity of preparing future agricultural professionals equipped with knowledge of organic methods. This led to the establishment of programs that include practical components such as hands-on training and internships on organic farms (AYEBARE &

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[31] Benin, S., Nkonya, E., Okecho, G., Randriamamonjy, J., Kato, E., Lubade, G., … & Kyotalimye, M. (2010). Returns to spending on agricultural extension: the case of the national agricultural advisory services (naads) program of Uganda†. Agricultural Economics, 42(2), 249-267. https://doi.org/10.1111/j.1574-0862.2010.00512.x

[32] Twinomuhangi, R., Natuhwera, C., & Ampaire, E. (2019). Role of local policies in facilitating adaptation of smallholder farming to climate change in Uganda. Journal of Environment and Earth Science. https://doi.org/10.7176/jees/9-11-09

[33] Sridharan, V., Ramos, E., Zepeda, E., Boehlert, B., Shivakumar, A., Taliotis, C., … & Howells, M. (2019). The impact of climate change on crop production in Uganda—an integrated systems assessment with water and energy implications. Water, 11(9), 1805. https://doi.org/10.3390/w11091805

[34] Hauser, M. and Lindtner, M. (2016). Organic agriculture in post-war Uganda: emergence of pioneer-led niches between 1986 and 1993. Renewable Agriculture and Food Systems, 32(2), 169-178. https://doi.org/10.1017/s1742170516000132

KAWEESI, 2022)[35]. These programs aim to provide students with both theoretical knowledge and practical skills essential for successful organic farming, mirroring approaches taken by universities abroad that offer similar programs (Delate, 2006)[36].

The integration of organic agriculture into university curricula in Uganda can be attributed to various initiatives aimed at enhancing higher education institutions' capacity to tackle emerging agricultural challenges. The expansion of private universities in Uganda has played a crucial role in this process, as these institutions are often more adaptable and responsive to societal needs compared to public universities (Mugabi, 2012)[37]. With an increased demand for higher education and a growing interest in sustainable agricultural practices, private universities have developed programs that include organic farming principles within their curricula (Mugabi, 2012).

Moreover, the 2009 "Draft of Uganda Organic Agriculture Policy" has been significant in guiding educational institutions to align their curricula with national agricultural objectives (Jung, 2023). This policy aimed to standardize organic practices and facilitate training for agronomists and farmers knowledgeable about sustainable practices that positively impact food security in Uganda. Such frameworks have motivated universities to continually revise their curricula to meet the National Organic Agriculture Policy's goals, integrating both environmental and economic aspects of organic farming into their educational offerings (Jung, 2023).

Despite these positive developments, several challenges persist that hinder the growth of organic agriculture in Uganda. The Ministry of Agriculture, Animal Industry and Fisheries [MAAIF] notes that the promotion of organic agriculture in Uganda faces numerous challenges, notably policy gaps, insufficient production support, limited promotion and awareness, fragmented research and development, inadequate extension services and capacities, and weak market systems. A significant gap is the absence of clear frameworks and guidelines for organic livestock, poultry, fisheries, and related subsectors such as feed, fodder, and veterinary medicine, despite their importance and potential in organic agriculture. Currently, livestock contributes minimally, primarily through manure and biogas slurry. Additionally, despite 95% of Uganda’s seed needs being organically met by smallholder farmers through informal channels, there has been limited mobilization to leverage these organic seeds effectively for value addition and commercialization. The availability of commercial organic inputs remains limited due to inadequate identification and recommendation of suitable organic alternatives, hampering farmers who wish to transition to organic practices. Moreover, climate variability exacerbates pest and disease management challenges, affecting both

[35] AYEBARE, J. and KAWEESI, M. (2022). How internationalised is your curriculum? university graduate students speak out. The Uganda Higher Education Review, 10(1), 244-260. https://doi.org/10.58653/nche.v10i1.15

[36] Delate, K. (2006). Incorporating organic and agroecological approaches into the university curricula: the iowa state university graduate program in sustainable agriculture. HortTechnology, 16(3), 445-448. https://doi.org/10.21273/horttech.16.3.0445

[37] Mugabi, H. (2012). The role of private universities in the provision of higher education in Uganda: growth and challenges. Africa Education Review, 9(2), 213-229. https://doi.org/10.1080/18146627.2012.721612

conventional and organic agriculture sectors (Ministry of Agriculture, Animal Industry and Fisheries [MAAIF], 2019)[38].

Furthermore, the review of the political economy surrounding Ugandan agriculture reveals that deep-seated issues such as land tenure security and property rights, particularly among women, pose barriers to the successful adoption of organic agriculture. Many smallholder farmers lack the necessary legal rights and security to invest in long-term organic transformation (Bamwesigye et al., 2020). Additionally, the general socio-economic conditions prevalent among smallholders, such as poverty and limited access to financial resources, create significant challenges when transitioning to organic farming practices that may yield lower outputs during the conversion period (Bamwesigye et al., 2020;,Priegnitz et al., 2019[39]).

Organic agriculture in Tanzania

The evolution of organic agriculture in Tanzania has been influenced by various factors, including policy developments, smallholder farming practices, and environmental considerations. The agricultural landscape in Tanzania has been primarily characterized by conventional practices, with smallholder farmers accounting for about 85% of agricultural production in the country and covering approximately 5.1 million hectares annually (Wineman et al., 2020)[40].

According to data provided by the Tanzania Organic Agriculture Movement (TOAM)[41], Tanzania's organic agriculture sector is significantly strengthened through Participatory Guarantee System (PGS) initiatives involving various supporting organizations. Sustainable Agriculture Tanzania (SAT) is the largest initiative, coordinating 96 groups with 1,893 producers, of which 84 groups comprising 1,581 producers are certified, cultivating 4,500 acres organically. SwissAid closely follows, managing 168 groups with 2,976 producers, and certifying 166 groups with 2,940 producers across 5,000 acres. The Tanzania Organic Agriculture Movement itself oversees 21 groups involving 467 producers, having certified 19 groups and 420 producers farming on 1,240 acres. UWAMWIMA has successfully certified all its 18 groups, covering 270 producers cultivating 168 acres. MESULA operates on a smaller scale with three certified groups, each producer certified, cultivating 126 acres. Iles De Paix (IDP) similarly manages three certified groups involving 89 producers farming 134 acres. Meanwhile, Milele Zanzibar Foundation is currently developing four groups comprising 92 producers, none of whom are yet certified.

Overall, these PGS initiatives encompass a total of 313 groups with 5,850 producers, of whom 293 groups and 5,363 producers are certified, collectively cultivating 11,168 acres of organic farmland. The main value chains targeted by these initiatives include crops such as vegetables, fruits, spices, seasonal cereal crops, and sunflower, alongside animal production

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[38] Ministry of Agriculture, Animal Industry and Fisheries. (2019). *The National Organic Agriculture Policy*. Government of Uganda. Retrieved from https://www.agriculture.go.ug/wp-content/uploads/2020/09/National-Organic-Agriculture-Policy.pdf

[39] Priegnitz, U., Lommen, W., Onakuse, S., & Struik, P. (2019). A farm typology for adoption of innovations in potato production in southwestern Uganda. Frontiers in Sustainable Food Systems, 3. https://doi.org/10.3389/fsufs.2019.00068

[40] Wineman, A., Jayne, T. S., Modamba, E. I., & Kray, H. A. (2020). The changing face of agriculture in tanzania: indicators of transformation. Development Policy Review, 38(6), 685-709. https://doi.org/10.1111/dpr.12491

[41] Provided by Tanzania Organic Agriculture Movement (TOAM) on July 2, 2025).

primarily involving poultry and goats. Additionally, several individual, non-group certified farms contribute significantly to Tanzania's organic agriculture sector. These independent farms collectively cultivate approximately 205.64 acres. Notable farms include SAT Organic Farm, which covers 55 acres; Tamutamu Organic Farm located in Iringa, covering 40 acres; Step By Step Organic Farm with 30 acres; and Organica Farm Campus in Mtwara, managing 15 acres. Smaller farms, ranging from 0.5 to 13.5 acres, predominantly produce coconut products, honey, jams, poultry, and various crops.

The TOAM data further reveals that the third-party certified organic cotton sector represents the largest segment of organic agriculture in Tanzania by scale. It includes 24,750 certified farmers cultivating a total area of 178,933.6 acres, yielding 50,870,859 kilograms of certified organic cotton. Bariadi district leads with the largest number of certified farmers (9,178), cultivating 58,319.60 acres, and producing 10,618,493 kilograms of organic cotton. Meatu district, although having fewer farmers (3,966), produces the highest volume of organic cotton (17,888,297 kg) cultivated on 54,452.5 acres. Other major contributing districts include Iramba, Ikungi, and Mkalama, each substantially enhancing the organic cotton sector's overall productivity

In Tanzania, policy developments aimed at enhancing agricultural sustainability and promoting organic practices have gained prominence due to the rising recognition of the importance of sustainable agriculture. In recent years, there has been a noticeable shift towards climate-smart and sustainable agricultural practices. This transition has been partly driven by the adverse impacts of climate change, which have underscored the vulnerability of agriculture in Tanzania (Kurgat et al., 2020[42]; (Tilumanywa, 2021). Policymakers have recognized this challenge, prompting the integration of Climate Smart Agriculture (CSA) into the Agricultural Sector Development Plan II and other strategic frameworks aimed at improving resilience and productivity in the agricultural sector (Jones et al., 2021)[43]. CSA emphasizes practices that promote soil health, biodiversity, and sustainable resource management, including the adoption of organic farming practices (Mdee et al., 2020)[44].

The government has actively promoted CSA as part of its agricultural policies, emphasizing the need for resilience building, improved productivity, and reduced environmental impact (Kurgat et al., 2020). Such policies reflect a response to global and regional agricultural challenges, aligning with frameworks such as the African Union Malabo Declaration (Kurgat et al., 2020), which underscores commitments to sustainable agricultural practices.

The promotion of organic agriculture in Tanzania is manifested in various forms, including investments in research and development aimed at increasing the capacity of smallholder farmers to adopt organic practices. For instance, trials are being conducted on organic cotton cultivation, which underscores the potential benefits of organic farming for smallholder

[42] Kurgat, B. K., Lamanna, C., Kimaro, A. A., Namoi, N., Manda, L., & Rosenstock, T. S. (2020). Adoption of climate-smart agriculture technologies in Tanzania. Frontiers in Sustainable Food Systems, 4. https://doi.org/10.3389/fsufs.2020.00055

[43] Jones, K., Nowak, A., Berglund, E., Grinnell, W., Temu, E., Paul, B. K., … & Kimaro, A. A. (2021). Integrating evidence of potential impacts of climate-smart agriculture in Tanzania.. agriRxiv, 2021. https://doi.org/10.31220/agrirxiv.2021.00103

[44] Mdee, A., Ofori, A. D., Chasukwa, M., & Manda, S. (2020). Neither sustainable nor inclusive: a political economy of agricultural policy and livelihoods in Malawi, Tanzania and Zambia. The Journal of Peasant Studies, 48(6), 1260-1283. https://doi.org/10.1080/03066150.2019.1708724

livelihoods. The government's efforts are complemented by non-governmental organizations that promote organic agriculture through various initiatives, aiding local farmers in accessing organic markets and improving their agricultural outputs sustainably (Altenbuchner et al., 2014)[45].

Further support for these policies in Tanzania comes through the integration of gendered approaches in agricultural policy-making. Studies have shown that gender mainstreaming within agricultural policies can enhance the effectiveness of such policies, ensuring they are comprehensive and address the needs of diverse farmer demographics (Smith et al., 2023)[46]. This approach not only helps in uplifting women's roles in agriculture but also enhances overall agricultural productivity by ensuring diverse perspectives are considered in the decision-making process.

Moreover, the role of community participation is crucial in policy implementation and sustainability initiatives. For example, local government involvement in integrating sustainable practices into community budgeting reflects an effort to ensure that agricultural policies are not merely top-down but involve grassroots engagement (Lukwambe & Bwathondi, 2024)[47]. Such participatory approaches are essential for adapting and sustaining agricultural innovations that align with the local needs and environmental realities.

Further, increasing public awareness of environmental issues and consumer demand for organic products has catalyzed a gradual embrace of organic farming methodologies. Awareness campaigns and local initiatives aimed at promoting sustainable practices are progressively influencing local farmer behavior, despite historical reliance on chemical fertilizers and pesticides (Lekei et al., 2014; Mtega et al., 2016)[48][49]. There is an observable trend among some smallholder groups to engage in organic practices, driven by both market demands and ecological considerations (Mdee et al., 2020).

The dynamics of access to agricultural information also play a crucial role in this transition. Agricultural knowledge dissemination remains a challenge due to limited extension services, as one agricultural extension agent often serves multiple villages, creating a poor agent-to-

[45] Altenbuchner, C., Larcher, M., & Vogel, S. (2014). The impact of organic cotton cultivation on the livelihood of smallholder farmers in Meatu district, Tanzania. Renewable Agriculture and Food Systems, 31(1), 22-36. https://doi.org/10.1017/s1742170514000416
[46] Smith, R., Mdee, A., & Sallu, S. M. (2023). How gender mainstreaming plays out in Tanzania's climate-smart agricultural policy: isomorphic mimicry of international discourse. Development Policy Review, 41(6). https://doi.org/10.1111/dpr.12718
[47] Lukwambe, B. and Bwathondi, P. O. J. (2024). The past, present and future developments in mariculture in the coastal waters of mainland Tanzania. Aquaculture, Fish and Fisheries, 4(4). https://doi.org/10.1002/aff2.201
[48] Lekei, E., Ngowi, A. V., & London, L. (2014). Pesticide retailers' knowledge and handling practices in selected towns of tanzania. Environmental Health, 13(1). https://doi.org/10.1186/1476-069x-13-79
[49] Mtega, W. P., Ngoepe, M., & Dube, L. (2016). Factors influencing access to agricultural knowledge: the case of smallholder rice farmers in the Kilombero district of Tanzania. SA Journal of Information Management, 18(1). https://doi.org/10.4102/sajim.v18i1.679

farmer ratio (Mtega, 2021; Masanyiwa et al., 2019)[50][51]. Efforts to enhance the flow of agricultural information through various channels can significantly impact the rate of adoption of organic farming (Ndimbwa et al., 2020; Manda, 2002)[52][53]. While mechanization has historically focused on conventional practices, emerging models are now incorporating organic methodologies that enhance productivity while maintaining environmental integrity (Takeshima & Lawal, 2020)[54]. This mechanization trend is conducive to larger-scale implementations of organic practices, particularly among more economically viable smallholder farmers (Tilumanywa, 2021).

Organic agriculture in Tanzania faces several significant challenges that hinder its growth and sustainability. These challenges include insufficient access to knowledge and information, limited financial resources, soil fertility issues, and the prevailing agricultural policies that often favor conventional farming practices.

Firstly, one of the critical barriers to the promotion of organic agriculture is the lack of access to relevant knowledge and information among smallholder farmers. Many smallholders are unaware of organic farming techniques, market opportunities for organic products, or the environmental benefits of transitioning to organic methods Selya et al. (2023)[55]. Educational initiatives aimed at improving farmers' understanding of organic practices and pest management are crucial but remain insufficient, leading to low adoption rates of organic methods in rural areas (Laizer et al., 2019)[56]. Studies indicate that a significant gap exists in farmers' perceptions and knowledge regarding effective pest and weed management in organic systems, highlighting the urgent need for targeted educational programs (Laizer et al., 2019).

Secondly, limited financial resources significantly impede the growth of organic agriculture. Smallholder farmers often struggle to access credit facilities necessary for investing in organic inputs, technology, and sustainable agricultural practices (Isaga, 2018)[57]. The farming sector is characterized by high levels of poverty, with many rural households lacking the capital needed to transition to organic farming methods, which may require initial investment for

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50 Mtega, W. P. (2021). Communication channels for exchanging agricultural information among tanzanian farmers: a meta-analysis. IFLA Journal, 47(4), 570-579. https://doi.org/10.1177/03400352211023837

51 Masanyiwa, Z. S., Mdachi, S. J., Namwata, B. M., & Safari, J. (2019). Decentralisation by devolution and farmers' access to agricultural extension services in Dodoma, Tanzania. Asian Journal of Agricultural Sciences, 10(1), 1-8. https://doi.org/10.19026/ajas.10.5982

52 Ndimbwa, T., Mwantimwa, K., & Ndumbaro, F. (2020). Channels used to deliver agricultural information and knowledge to smallholder farmers. IFLA Journal, 47(2), 153-167. https://doi.org/10.1177/0340035220951828

53 Manda, P. A. (2002). Information and agricultural development in Tanzania: a critique. Information Development, 18(3), 181-190. https://doi.org/10.1177/026666602400837275

54 Takeshima, H. and Lawal, A. O. (2020). Agricultural mechanization in Tanzania. https://doi.org/10.2499/9780896293809_14

55 Selya, N. Y., Dimoso, P., & Mgale, Y. J. (2023). Exploring the adoption and impact of conservation agriculture among smallholder farmers in semi-arid areas: evidence from Chamwino district, Tanzania. Research on World Agricultural Economy, 4(2), 47-61. https://doi.org/10.36956/rwae.v4i2.801

56 Laizer, H., Chacha, M., & Ndakidemi, P. A. (2019). Farmers' knowledge, perceptions and practices in managing weeds and insect pests of common bean in northern Tanzania. Sustainability, 11(15), 4076. https://doi.org/10.3390/su11154076

57 Isaga, N. (2018). Access to bank credit by smallholder farmers in Tanzania: a case study. Afrika Focus, 31(1), 241-256. https://doi.org/10.1163/2031356x-03101013

organic input procurement and potential yields adjustments during the transition period (Tilumanywa, 2021). Consequently, the lack of access to financial services is a substantial barrier affecting farmers' capacity to adopt organic practices successfully.

Soil fertility presents another critical challenge for organic farmers in Tanzania. The transition to organic agriculture often necessitates a period of rebuilding soil health, which can take several years before improvements in fertility are observed (Kwiatkowski & Harasim, 2020)[58]. Organic farming relies heavily on sustainable practices such as composting and crop rotations, which can initially lead to lower yields compared to conventional agriculture (Kwiatkowski & Harasim, 2020). Moreover, many smallholders face challenges like soil degradation, which often results from previous agricultural practices and poor agroecological conditions, further complicating the shift to organic methods (Chizallet et al., 2018)[59].

Lastly, existing agricultural policies in Tanzania are frequently skewed towards conventional agricultural practices, which can undermine organic agriculture's competitiveness (Robbins, 2010)[60]. Policy frameworks tend to prioritize short-term yields over long-term environmental sustainability and organic practice promotion, creating an unbalanced playing field (Snyder et al., 2021)[61]. This policy bias limits the support systems—such as extensions services and market access—that are essential for the successful adoption of organic practices among smallholders.

Role of standards in organic agriculture and challenges

The origins of organic certification can be traced back to the late 20th century when growing consumer demand for organic products prompted the establishment of formal standards. Pioneering contributions on organic farming as a definable agricultural production system from key individuals including Sir Albert Howard, F.H. King, Rudolf Steiner, and others emphasized the importance of biological processes, especially maintaining a healthy soil through the use of animal manures, composting, crop rotation, and biologically based pest management (Encyclopedia Britannica, n.d.)[62]. Sir Albert Howard, drawing from his experiences as an agricultural researcher in India, was particularly influenced by traditional sustainable practices he encountered there and strongly promoted their implementation in Western agriculture (Encyclopedia Britannica, n.d.). The ideas of organic farming were further popularized during the 1930s and 1940s by influential figures such as J.I. Rodale, his son Robert Rodale, Lady Eve Balfour, and Rudolf Steiner, who consistently advocated for natural farming practices over

58 Kwiatkowski, C. A. and Harasim, E. (2020). Chemical properties of soil in four-field crop rotations under organic and conventional farming systems. Agronomy, 10(7), 1045. https://doi.org/10.3390/agronomy10071045

59 Chizallet, M., Barcellini, F., & Prost, L. (2018). Supporting farmers' management of change towards agroecological practices by focusing on their work: a contribution of ergonomics. Cahiers Agricultures, 27(3), 35005. https://doi.org/10.1051/cagri/2018023

60 Robbins, P. (2010). Partnerships and sustainability in the tea industry: a critical analysis of dynamics between smallholders and estates in Tanzania. Journal of Sustainable Agriculture, 34(8), 862-877. https://doi.org/10.1080/10440046.2010.519201

61 Snyder, K. A., Sulle, E., Massay, D., Petro, A., Qamara, P., & Brockington, D. (2021). 'modern' farming and the transformation of livelihoods in rural Tanzania. Prosperity in Rural Africa?, 129-153. https://doi.org/10.1093/oso/9780198865872.003.0006

62 Encyclopedia Britannica. (n.d.). Organic farming. Encyclopedia Britannica. Retrieved July 6, 2025, from https://www.britannica.com/topic/organic-farming

synthetic inputs, asserting that healthy soils produced healthier plants, animals, and ultimately people (Wenatchee Tree Fruit Research & Extension Center, n.d.).

Public awareness of the benefits associated with organic farming gained momentum in the 1960s, notably after the publication of Rachel Carson's seminal book, *Silent Spring* (1962), which highlighted the significant environmental damage caused by widespread pesticide use (Wenatchee Tree Fruit Research & Extension Center, n.d.; Encyclopedia Britannica, n.d.). This increasing environmental consciousness during the subsequent decades, particularly the 1970s, spurred consumer demand for organic products. However, despite the growing popularity, organic agriculture still represented only a fraction of total food production. Recognizing the need to authenticate claims of "organically grown" products, often sold at premium prices, stakeholders initiated the first organic certification systems, including notable early examples such as the Tilth Producers Cooperative certification in Washington State (Wenatchee Tree Fruit Research & Extension Center, n.d.)[63].

One key milestone in the evolution of organic certification is the establishment of international standards, such as those developed by the International Federation of Organic Agriculture Movements (IFOAM), which set benchmarks for organic practices worldwide[64]. Currently, the landscape of organic certification has become diverse, offering various schemes tailored to specific market needs and consumer preferences. Certification schemes such as GlobalG.A.P. focus on food safety, traceability, and sustainable agriculture, mainly targeting large-scale producers for international market access[65]. USDA Organic Certification and EU Organic Certification set stringent standards to satisfy environmentally conscious consumers primarily in the United States and Europe, respectively[66,67]

Participatory Guarantee Systems (PGS) are locally focused quality assurance systems, certifying producers based on active participation of stakeholders and are built on a foundation of trust, social networks and knowledge exchange (IFOAM, 2023)[68]. Fair Trade[69] and Rainforest Alliance[70] certifications combine sustainable practices with ethical sourcing and

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63 Wenatchee Tree Fruit Research & Extension Center. (n.d.). Organic agriculture: Background. Washington State University. Retrieved July 6, 2025, from https://tfrec.cahnrs.wsu.edu/organicag/tree-fruit/background/#:~:text=Organic%20farming%20as%20a%20definable,of%20the%20total%20food%20supply.

64 IFOA - Organics International (2025). *50 Years of IFOAM - Organics International* https://www.ifoam.bio/celebrating-decades-of-success#:~:text=Five%20decades%20later%2C%20we%20now,this%20timeline%20in%20full%20screen.

65 GlobalG.A.P. (n.d.). *Integrated farm assurance (IFA) standard.* Retrieved July 6, 2025, from https://www.globalgap.org/certification-bodies/

66 United States Department of Agriculture. (2023). *Organic Standards*. USDA Agricultural Marketing Service. Retrieved July 6, 2025, from https://www.ams.usda.gov/grades-standards/organic-standards

67 European Commission. (2023). *Organic farming – rules on production and labeling*. European Commission Agriculture and Rural Development. Retrieved July 1, 2025, from https://agriculture.ec.europa.eu/farming/organic-farming/organic-production-and-products_en

68 IFOAM – Organics International. (2023). *Participatory Guarantee Systems (PGS)*. Retrieved July 1, 2025, from https://www.ifoam.bio/our-work/how/standards-certification/participatory-guarantee-systems

69 Fairtrade International. (2021). *Fairtrade standards.* Fairtrade International. Retrieved July 6, 2025, from https://www.fairtrade.net/standard

70 Rainforest Alliance. (2020). Rainforest Alliance Sustainable Agriculture Standard 2020. Rainforest Alliance. Retrieved July 6, 2025, from https://www.rainforest-alliance.org/resource-item/2020-sustainable-agriculture-standard/

biodiversity conservation, addressing dual consumer concerns (Oelze et al., 2020; Kassem et al., 2021).

Region-specific certifications like India's NPOP[71], Korea's Organic Certification[72], and Japan's JAS[73] and Halal[74] certifications cater to localized consumer demands and international trade opportunities. African-specific frameworks, such as the East African Organic Products Standard (EAOPS), have been developed to harmonize regional standards, boost intra-regional trade, and improve access to international markets. [75] Similarly, the ASEAN Standard for Organic Agriculture (ASOA) provides harmonized guidelines aimed at strengthening regional market integration among ASEAN member states.[76]

In a bid to nurture the East African regional organic markets and the organic agriculture sectors, the five countries (Kenya, Uganda, Tanzania, Rwanda and Burundi) teamed up to harmonize the existing organic standards in the region. In 2005, the East African Standard (2007) noted that there were five public or private standards for organic agricultural production in East Africa. Stakeholders were concerned that this multitude of standards could eventually become a technical barrier to trade within the region and place undue restrictions on regional collaboration. There was general consensus that the time was ripe for the development of a common East African organic standard. This led to a process of harmonizing the existing organic standards to develop the East African Organic Product Standard (EAOPS). This is the second regional standard in the world, following after the EU regulations. Together with the EAOPS, the five countries also agreed on one common mark, the East African Organic Mark (EAOM) that has been used in certified products conforming to EAOPS or equivalent standards. This was a major milestone and it was anticipated that it would lead to the development of organic agriculture in the region, expansion of national and regional markets and eventually a basis for equivalence and recognition of EAOPS and organic products from the region. The EAOPS is benchmarked with the IFOAM Basic Standards and the Codex Alimentarius guidelines for the production, processing, labelling and marketing of organically produced foods (East African Standard (2007).[77]

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[71] Agricultural and Processed Food Products Export Development Authority (APEDA). (2023). *National Programme for Organic Production (NPOP)*. Ministry of Commerce & Industry, Government of India. Retrieved July 6, 2025, from https://npop.apeda.gov.in/sites/default/files/2024-10/NPOP_Eight_Edition_2024.pdf

[72] National Agricultural Products Quality Management Service (NAQS). (2023). *Korea Organic Certification System*. Ministry of Agriculture, Food and Rural Affairs, Republic of Korea. Retrieved July 6, 2025, from https://www.naqs.go.kr/english/sub/info.do?menuId=MN01020203

[73] Ministry of Agriculture, Forestry and Fisheries (MAFF), Japan. (2023). *Japanese Agricultural Standard (JAS) for Organic Products*. MAFF. Retrieved July 6, 2025, from https://www.maff.go.jp/e/policies/standard/jas/index.html

[74] Japan Halal Foundation (JHF). (2023). *Halal Certification in Japan*. Japan Halal Foundation. Retrieved July 6, 2025, from https://www.japanhalal.or.jp/en/about-halal-certification

[75] East African Community. (2007). *East African organic products standard (EAOPS), EAS 456:2007*. Retrieved July 1, 2025, from https://www.koan.co.ke/wp-content/uploads/2020/08/East_African_Organic_products_standard.pdf

[76] Association of SouthEast Asian Nations (ASEAN), (2021). *ASEAN standard for organic agriculture*. Retrieved July 1, 2025, from https://asean.org/wp-content/uploads/2021/08/ASEAN-STANDARD-FOR-ORGANIC-AGRICULTURE-ASOA.pdf

[77] East African Standard (2007). *East African organic products standard*. https://www.koan.co.ke/wp-content/uploads/2020/08/East_African_Organic_products_standard.pdf

1.2 Objectives of the study

1.2.1 General objective of the study

The main objective of the study was to document the companies trading in the organic sector including conventional companies interested in trading in organic products, companies already trading in the Eastern Africa region and those trading locally but with potential to expand their market in the eastern Africa region.

1.2.2 Specific objectives of the study

The study was guided by the following specific objectives:

i. Identify at least 60 companies (20 in each country), their enterprise and services they are involved in.
ii. Document the stage of growth and development of the companies in terms of outputs, spatial coverage, personnel, and infrastructure development.
iii. Identify scope, benefits and contributions the companies are making to local and national economy.
iv. Identify the export readiness of the companies- does the company have sufficient production capacity that can be committed to the export market.
v. Document the extent to which the companies are utilizing the EAOPS standard and other organic standards.
vi. Identify challenges (Including trade barriers) and opportunities that these companies operate.
vii. Based on the findings of the assessment, provide recommendations on how the companies can be strengthened to deliver products and services to domestic and export markets.

2.0 METHODOLOGY

2.1 Introduction

This section presents materials and methods that were used to conduct the study. It comprises of research design, population, sampling techniques, data collection and data analysis. The Consultant's methodological framework combined rigorous research methodologies, stakeholder engagement, and data analysis to ensure a thorough examination of the subject matter.

2.2 Study design

This study employed a mixed-methods research design, an approach to inquiry that combines both qualitative and quantitative methods. It involves philosophical assumptions, utilizing both qualitative and quantitative techniques, and combining them in a study. Thus, it is more than simply collecting and analyzing both kinds of data; it also involves using both approaches in tandem so that the overall strength of a study is greater than either qualitative or quantitative research (Creswell & Plano Clark, 2007).

The study employed a quantitative approach, conducting surveys targeting companies in both the organic sector and those practising conventional production to collect quantitative data for statistical analysis. This analysis aimed to establish quantitative parameters in support of the study's objectives.

The study utilized a list of companies provided by the National Organic Agriculture Movements (NOAMs) in Kenya, Uganda and Tanzania to reach a total of 95 companies involved in organic and conventional production and processing. Of the 95 companies surveyed, a total of 37 were Kenyan, 33 were Ugandan, and 25 were Tanzanian. Thus, the survey analysis and reporting utilized the 95 interviews with the companies.

Additionally, the study utilized key informant interviews (KII) as the qualitative data collection technique to explore participants' experiences, perceptions, and perspectives in-depth regarding penalties on transit bonds. The study identified the target KII participants through purposive sampling to select information-rich cases. (Patton, 2002) This method involves deliberately selecting participants based on specific criteria to gather the most relevant data. The study employed purposive sampling to ensure that the chosen participants possessed the appropriate expertise and experience necessary for the study's objectives.

Specifically, the study targeted seven interviews with key informants in each country, including officials from the NOAMs, government state departments, regulatory bodies, certification bodies and schemes, and exporters' associations.

Table 2: *Study target and achieved sample*

Design	Target respondent	Tool	Target sample size	Achieved sample
Quantitative	Companies in organic trade and those potentially interested in transitioning to organic production	Survey questionnaire	60	Kenya (37) Uganda (33) Tanzania (25)
Qualitative	National organic agriculture bodies (3), certification bodies (6), Exporters and logistics providers	KII guides	21	Kenya (5) Uganda (7) Tanzania (3)

	in the organic sector (6), and State departments (6)			

2.3 Data collection

As previously noted, the study employed a mixed-methodology approach to ensure that the study answers the objectives comprehensively. Thus, the study employed fully structured digital survey questionnaires to collect quantitative data from target organic and conventional companies in Kenya, Uganda, and Tanzania. Likewise, qualitative data were collected using unstructured key informant guides to gather information from purposefully identified respondents. The data collection exercise completed a total of 95 surveys with companies and 15 key informant interviews with experts.

2.4 Data analysis

In the context of this study, the Consultant cleaned, sorted and analyzed the survey and KII data. The consultant utilized IBM Statistical Package for the Social Sciences (SPSS) Version 27 to prepare and analyze the survey data, primarily employing descriptive statistical analysis techniques to generate sample proportions and descriptive statistics of key measures of the study. The Consultant presented the outputs in the form of graphs, charts and tables.

The qualitative data underwent analysis by grouping collected information by themes to facilitate content analysis. The thematic analysis entailed first identifying the common themes guided by the study objectives. Thereafter, the Consultant carried out an exploratory analysis of the qualitative data, involving structural coding and partitioning of the data in line with the identified themes. Finally, the Consultant analyzed the extracted KII data to generate study findings and complement the survey findings.

2.5 Study limitations

a) During data collection, there were significant delays and refusals by some of the targeted key informants in Kenya and Tanzania. Some officials required formal letters routed to their departments, while others declined outright or conditioned participation on incentives. These access barriers limited the diversity of high-level perspectives and may have skewed qualitative insights toward more readily available stakeholders.
b) Initial sampling relied on membership lists from national organic movements, many of which were outdated, incomplete, or inadequate. The research repeatedly sourced supplementary lists to achieve robust sample sizes, prolonging data collection. This challenge hindered the efficient scheduling of surveys and interviews.
c) Because the sample was primarily from organic-sector networks, purely conventional companies were scarce in our sample (3) despite numerous attempts to identify and include them. As a result, the study was unable to fully address the objectives related to practices, motivations, or barriers among non-organic producers. This gap limits the study's ability to compare EAOPS adoption drivers across the full spectrum of agricultural companies.
d) The surveyed companies were, by design, those already linked, formally or informally, to the NOAMs. Their existing engagement with the organic movements biased responses toward higher levels of awareness and intent. Consequently, the findings cannot be

extrapolated to the wider population of agricultural companies in Kenya, Uganda, or Tanzania, especially those outside established organic networks.

e) Several analysis areas depended on follow-up questions answered only by subsets of respondents (e.g., those aware of EAOPS or already certified). These conditional filters yielded very small cell sizes in some cross-tabulations, leading to wide margins of error and reduced statistical confidence. The consultant has included the absolute sample sizes in all analyses to help readers interpret the findings accordingly.

3.0 STUDY FINDINGS

3.1 Introduction

Sustainable regional organic trade in the East African region depends on three pillars: expanded intra-East African commerce, rigorous compliance with the East Africa Organic Products Standard (EAOPS), and strengthened capacity at every link of the value chain. By increasing regional trade flows, the project creates larger, more integrated markets for organic producers and processors across Kenya, Uganda, and Tanzania. Simultaneously, it supports firms, farmer groups, and certification bodies in meeting EAOPS requirements, thereby boosting transparency, trust, and credibility in both regional and global markets. Finally, targeted capacity-building for growers, processors, traders, and organic associations reduces regulatory hurdles, raises industry standards and smooths market-entry pathways. Together, these efforts will enhance the value and quality of East African organics, reduce barriers to expansion, and unlock new opportunities for sustainable growth.

The study aimed to document companies actively trading in the organic sector, including those in conventional markets that may be interested in expanding into organic products. The primary objectives were:

i. **Objective 1. Identify at least 60 companies (20 in each country), their enterprise, and the services they are involved in:** The study aimed to map out key players in the organic and conventional sectors across Kenya, Uganda, and Tanzania, with a focus on identifying companies that have the potential for organic trade expansion. To comprehensively answer this objective, the study employed the following matrix in identifying companies that have the potential for organic trade expansion.

OBJECTIVE	AREA	INDICATORS
OBJECTIVE 1: IDENTIFY AT LEAST 60 COMPANIES (20 IN EACH COUNTRY), THEIR ENTERPRISE, AND THE SERVICES THEY ARE INVOLVED IN	Company profile & demographics	• Company identity and location: documenting company names and their respective countries of operation. • Operational history: recording how long each company has been in business. • Business registration status: noting the legal structure of each company (e.g., sole proprietorship, partnership, limited liability). • Scale of operations: categorizing companies as small, medium, or large scale based on metrics like hectares, production volume, or number of employees.
	Sector involvement & value chain position	• Sector type: determining if companies are involved in organic, conventional, or both types of agriculture. • Primary role in the value chain: identifying whether companies are engaged in production, processing/value addition, marketing/distribution, export services, input supply, or support services. • Specific products/services offered: listing the types of crops, livestock, processed goods, inputs, or services provided by each company.
	Certification & standards	• Current certifications held: documenting certifications such as Good Agricultural Practices (GAP), EAOPS, EU Organic, USDA Organic, HACCP/ISO, or others relevant to organic standards. • Access to certification; services, costs

	Markets & distribution channels	• Market orientation: understanding whether companies sell products locally, regionally (within East Africa), or internationally. • Market share distribution: estimating the percentage of products sold in each market segment. • Export destinations & distribution channels: identifying target continents or countries for exports and detailing distribution channels used (e.g., direct sales, wholesalers, retail chains).
	Potential and readiness for organic transition (for conventional companies)	• Transition timeline: indicating the planned timeframe for conventional companies to transition to organic production. • Current alignment with organic principles: assessing the extent to which conventional products align with organic principles (e.g., low chemical inputs, natural methods). • Easiest products/services to convert: identifying products or services that can meet EAOPS or similar standards with minimal adjustments.
	Factors influencing organic transition	• Facilitating factors: noting factors that facilitate organic transition, such as existing demand, sustainable practices, and availability of organic inputs. • Barriers: highlighting obstacles such as certification costs, lack of organic inputs, technical knowledge gaps, and market access issues.
	Perception of demand and market evidence for organic	• Perceived demand: gauging the level of customer interest in organic products. • Market evidence: documenting indicators like customer inquiries, price premiums, competitor activities, and requests from exporters.
	Capacity and infrastructure for organic compliance	• Facility suitability: evaluating how well current equipment, processes, and systems comply with organic standards. • Needed improvements: identifying areas requiring upgrades, such as sourcing compliant inputs, enhancing processing capabilities, improving traceability, storage, handling, logistics, and staff training.
	Willingness to invest in organic transition	• Investment readiness: assessing companies' willingness to invest in upgrading facilities and processes for organic compliance. • Training needs: identifying types of training required, such as certification requirements, farm management, post-harvest handling, marketing, and traceability.

ii. **Objective 2. Document the stage of growth and development of the companies in terms of outputs, spatial coverage, personnel, and infrastructure development:** This objective aimed to assess the capacity and operational maturity of companies trading in organic products in Kenya, Uganda, and Tanzania. The study employed the following matrix in assessing the capacity and operational maturity of companies trading in organic products

OBJECTIVE	AREA	INDICATORS
OBJECTIVE 2: DOCUMENT THE STAGE OF GROWTH AND DEVELOPMENT OF THE COMPANIES IN TERMS OF OUTPUTS, SPATIAL COVERAGE, PERSONNEL, AND INFRASTRUCTURE DEVELOPMENT.	Outputs	• Annual production volume: quantifying the production output annually in metric tons of the main product. • Proportion of organic output: identifying the percentage of total output that is currently organic or has potential to be organic. • Trends in sales/revenues: analyzing sales or revenue trends over the past three years to understand growth patterns (increase, decrease, stable).
	Spatial coverage	• Domestic geographic reach: describing the extent of market penetration within local, regional, and national markets. • Export activity status and plans: documenting current export activities (conventional/organic) and future plans for organic exports. • Anticipated changes in geographic coverage: predicting potential expansions into new domestic or international markets.
	Personnel	• Company staffing levels: enumerating the number of full-time and part-time/seasonal employees. • Workforce expertise in organic practices: assessing the percentage of staff trained or experienced in organic production, processing, or marketing. • Willingness to invest in staff training: determining if there are plans to invest in training for organic standards.
	Infrastructure and development	• Level of infrastructure sophistication: evaluating the sophistication level of facilities and processes (basic, moderate, well-developed, highly advanced). • Alignment with organic standards: verifying the degree to which current facilities and processes comply with organic standards. • Intent to invest in infrastructure for organic production or certification: understanding the company's plans to invest in infrastructure related to organic production or certification.
	Stage of growth classification	• Current stage of company development: categorizing companies into stages such as startup, early growth, established, expansion, or mature. • Projected growth trajectory with organic adoption: forecasting the expected growth path if organic adoption increases (significant growth, moderate growth, steady state, uncertain).

iii. **Objective 3. Identify scope, benefits, and contributions the companies are making to the local and national economy:** The study also assessed the economic impact that the companies are making on their local communities and the broader national economy in Kenya, Uganda, and Tanzania. The study utilized the following matrix in assessing the economic impact of organic companies on their local communities and the national economy.

OBJECTIVE	AREA	INDICATORS
OBJECTIVE 3: IDENTIFY SCOPE, BENEFITS, AND CONTRIBUTIONS THE COMPANIES ARE MAKING TO THE LOCAL AND NATIONAL ECONOMY.	Employment and job creation	• Employment trends: evaluate whether employment levels have been increasing, stable, or decreasing over the past three years. • Proportion of local employees: determine the percentage of the workforce drawn from nearby communities.
	Revenue generation and financial contributions	• Annual gross revenue: range of annual gross revenue generated by the companies. • Proportion of revenue from organic products: assess the percentage of total revenue derived from organic products. • Annual tax and levy payments: quantify the annual taxes and levies paid to the national government. • Revenue trends: analyze revenue trends over the past three years (growth, stability, decline).
	Local supply chains and sourcing	• Percentage of locally sourced inputs: measure the proportion of inputs sourced locally. • Engagement with local suppliers or smallholder farmers: number of local suppliers or smallholder farmers involved in the supply chain. • Trend in local sourcing: evaluate whether local sourcing has been increasing, stable, or decreasing over the past three years.
	Export earnings and market reach	• Export status and product type: identify whether companies export organic, conventional products, or both. • Percentage of revenue from exports: determine the percentage of total revenue derived from exports. • Primary export destinations: specify the main regions or countries to which products are exported.
	Non-monetary and indirect benefits	• Environmental sustainability practices: document practices such as soil conservation, reduced chemical use, and biodiversity protection. • Social and community benefits: assess contributions such as training local farmers, supporting community projects, and implementing fair labor practices. • Perceived overall economic contribution: gather perspectives on how these companies contribute to local and national development beyond financial metrics. • Perceived overall health contribution: assess the perceived health outcomes from utilization of organic products
	Future outlook and expansion plans	• Planned strategies for economic enhancement: explore strategies such as increasing local sourcing, expanding markets, pursuing organic certification, staff training, sustainable practices, and community initiatives.

iv. **Objective 4. Identify the export readiness of the companies – does the company have sufficient production capacity that can be committed to the export market?:** The study sought to establish the capacity of the companies in the organic sector to meet the demands of regional and international organic markets. The study employed the following matrix in assessing the ability of companies to meet the demands of regional and international organic markets

OBJECTIVE	AREA	INDICATORS
OBJECTIVE 4: IDENTIFY THE EXPORT READINESS OF THE COMPANIES; DOES THE COMPANY HAVE SUFFICIENT PRODUCTION CAPACITY THAT CAN BE COMMITTED TO THE EXPORT MARKET?	Production capacity and scalability	• Annual production volume: determine the current capacity in metric tons. • Potential for increasing production: assess the ability to scale output to meet export demands. • Seasonality and consistency: evaluate the reliability of product supply throughout the year.
	Certification and compliance with standards	• Current certifications held: identify certifications such as EAOPS, international organic standards, GAP, and HACCP/ISO. • Readiness to obtain or upgrade certifications: assess preparedness to obtain or enhance certifications required for export. • Level of compliance: evaluate adherence to international quality standards relevant to export markets.
	Quality control and product handling	• Existing quality control mechanisms: document procedures for inspections, testing, and traceability. • Post-harvest handling and cold storage infrastructure: assess sophistication of facilities to maintain product quality. • Packaging and labeling: evaluate readiness to meet export requirements for packaging and labeling. • Personnel and management capacity: assess the capacity of staff involved in quality control
	Logistics and supply chain management	• Transport and logistics solutions: assess access to efficient transport and specialized export logistics. • Supply chain reliability: evaluate reliability and lead times within the supply chain. • Experience with export documentation: document familiarity with export documentation and customs procedures.
	Market knowledge and existing export commitments	• Market intelligence: understand knowledge of target export destinations, customer preferences, and competitive landscape. • Status of export contracts: determine the existence and nature of export agreements (informal, formal, regular). • Frequency of export orders: assess the consistency and regularity of export shipments.
	Future plans and support needs	• Infrastructure investment: evaluate willingness to invest in infrastructure upgrades for improved export readiness. • Support requirements: identify specific needs such as training, financial assistance, technical support, or market research. • Short-term export readiness goals: determine immediate goals related to export readiness (e.g., obtaining certifications, expanding export presence).

v. **Objective 5. Document the extent to which the companies are utilizing the EAOPS standard and other organic standards:** This objective entailed assessing the extent to which the target companies are utilizing the East Africa Organic Products Standard (EAOPS) and other relevant organic certification standards. The study used the following matrix in measuring the adoption of organic standards within the companies and the extent of compliance with EAOPS

OBJECTIVE	AREA	INDICATORS
OBJECTIVE 5: DOCUMENT THE EXTENT TO WHICH THE COMPANIES ARE UTILIZING THE EAOPS STANDARD AND OTHER ORGANIC STANDARDS.	Certification status and awareness	• Current organic certification status: identify whether companies are certified, producing to standards but not certified, or operating under conventional practices. • Familiarity with EAOPS: assess awareness levels among companies (unaware, aware, considering, or already certified). • Type and number of certifications: document the specific certifications held by each company (e.g., EAOPS, USDA Organic, EU Organic). • Certification renewal: track the frequency and regularity of certification renewals.
	Compliance and implementation of EAOPS	• Stage of EAOPS implementation: evaluate whether companies are not implementing, in early stages, partially implementing, or fully implementing EAOPS. • Integration into supply chain: assess how well EAOPS requirements are integrated into various stages of the supply chain (input sourcing, processing, packaging, storage). • Documentation and record-keeping: evaluate the robustness of companies' documentation and record-keeping practices related to organic compliance. • Audit frequency and outcomes: document the frequency of audits conducted by certification bodies and outcomes in terms of compliance levels and corrective actions required.
	Investment, costs, and support needs	• Willingness to invest in EAOPS transition: determine the companies' readiness to invest financially in transitioning to EAOPS. • Planned investment areas: identify specific areas where companies plan to invest (e.g., certification fees, infrastructure upgrades, staff training). • Need for external support: assess the need for external support, such as financial assistance, technical guidance, or advisory services, to achieve or maintain EAOPS compliance.
	Challenges and barriers to compliance	• Main challenges in adopting EAOPS: document key challenges faced by companies (e.g., technical knowledge gaps, high costs, sourcing compliant inputs, complexity of documentation). • Difficulties in maintaining multiple certifications: identify challenges related to maintaining multiple organic certifications (e.g., differing standards, costs, documentation burdens).

	Market impact and product quality improvement	• Perceived market impact: assess how EAOPS certification influences market access, credibility, and pricing advantages for companies. • Quality improvements: document improvements in product quality linked to alignment with EAOPS or other organic standards.
	Future outlook and expansion of organic certification	• Future plans regarding EAOPS certification: capture companies' future intentions regarding EAOPS certification (e.g., no plans, initial pursuit, renewal, expansion). • Additional support needs: identify specific tools or support required to enhance or maintain compliance with EAOPS and other organic standards (e.g., technical training, financial assistance, improved traceability systems).

vi. **Objective 6. Identify challenges (including trade barriers) and opportunities that these companies face:** The study also sought to identify the challenges, including trade barriers, and opportunities that companies in the organic sector face. The study employed the following matrix in establishing the obstacles hindering organic trade and opportunities for growth within the organic sector.

OBJECTIVE	AREA	INDICATORS
OBJECTIVE 6: IDENTIFY CHALLENGES (INCLUDING TRADE BARRIERS) AND OPPORTUNITIES THAT THESE COMPANIES FACE.	Internal company factors (strengths and weaknesses)	• Internal strengths enabling success: identify company strengths such as skilled workforce, quality control systems, access to organic inputs, buyer relationships, financial stability, and brand reputation. • Internal challenges: document internal weaknesses such as technical knowledge gaps, limited production capacity, inadequate infrastructure, high certification costs, weak management, and issues with quality consistency.
	External market barriers and policy environment	• Trade barriers faced: identify external challenges including tariffs, non-tariff barriers (e.g., complex documentation, poor logistics), limited market intelligence, and restricted financing options. • National policy supportiveness: assess the degree of policy and regulatory support for organic trade within each country. • Influence of regional/international trade frameworks: evaluate the impact of regional agreements such as the East African Community (EAC) or the African Continental Free Trade Area (AfCFTA) on expanding or hindering organic trade.
	Opportunities for growth	• Identified market opportunities: highlight potential growth areas such as rising global demand for organics, niche premium markets, technological advancements, product diversification opportunities, and government or donor support initiatives. • Potential benefits from regional integration: assess the extent to which regional integration frameworks like AfCFTA or EAC improve market access and reduce trade costs for organic products.

	Partnerships and collaborations	• Desired collaborations: identify key partnerships with stakeholders such as certification bodies, logistics partners, input suppliers, research institutions, and international buyers to capitalize on opportunities and overcome barriers.
	Strategies to overcome challenges and enhance competitiveness	• Priority areas for improvement: outline critical areas for improvement such as reducing certification costs, upgrading infrastructure, strengthening management and quality systems, improving branding and marketing strategies, and accessing market intelligence. • Needed support or interventions: recommend specific support measures including policy reforms, reduced tariffs, affordable financing options, training in organic standards, and enhanced market data and linkage services.

3.2 Objective 1: Identify at least 60 companies (20 in each country), their enterprise, and the services they are involved in

Introduction

The study aimed to map out key players in the organic and conventional sectors across Kenya, Uganda, and Tanzania, with a focus on identifying companies that have the potential for organic trade expansion. The criteria for selecting companies included those currently involved in organic farming, processing, marketing, or export, as well as conventional companies that showed an interest or potential to engage in organic business. The output of this phase was a well-structured database of 60 companies, categorized by sector, such as production, processing, and export, and by country. This database will provide a comprehensive overview of the key players in the East African organic market.

Summary of findings

a) **Primary production focus, legal status and longevity:** The purposively sampled companies are primarily involved in organic practices: 74% of companies reported exclusively organic production (65% in Kenya, 76% in Uganda, 84% in Tanzania), 23% operated hybrid organic/conventional systems (30% in Kenya, 24% in Uganda, 12% in Tanzania), and only 3% were purely conventional (limited to Kenya and Tanzania). Formal business structures predominated, with 56% of firms registered as limited liability companies (LLCs), particularly in Tanzania (68%), followed by Uganda (55%) and Kenya (49%). Cooperatives accounted for 12%, notably in Uganda (24%), compared to Kenya (5%) and Tanzania (4%). The firm age was skewed toward newer entrants, with 51% having operated for 1–5 years (Kenya 51%, Uganda 42%, Tanzania 60%), 31% for 6–10 years (Kenya 35%, Uganda 27%, Tanzania 28%), and 18% for over a decade (Kenya 11%, Uganda 30%, Tanzania 12%), reflecting recent growth in the regional organic sector.

b) **Products and services:** Surveyed companies operated across diverse agricultural activities, highlighting a fully integrated value chain. Among primary producers (n=56), 64% specialized in vegetables (Kenya 73%, Uganda 50%, Tanzania 64%), 50% in grains (Kenya 46%, Uganda 63%, Tanzania 43%), 46% in fruits (Kenya 54%, Uganda 38%, Tanzania 43%), 41% in livestock (Kenya 58%, Uganda 31%, Tanzania 21%), and 29% in aquaculture (Kenya 27%, Uganda 31%, Tanzania 29%). In processing/value-addition (n=63), 48% handled fruits and vegetables (Kenya 73%, Uganda 42%, Tanzania 36%), 48% provided packaging/labelling (Kenya 47%, Uganda 50%, Tanzania 45%), 38% milled grains (Kenya 13%, Uganda 42%, Tanzania 50%), 27% produced cosmetics (Kenya 7%, Uganda 27%, Tanzania 41%), and 16% processed livestock products (Kenya 40%, Uganda 12%, Tanzania 5%). Marketing and distribution firms (n=48) relied primarily on wholesale (79% overall: Kenya 88%, Uganda 78%, Tanzania 71%) and retail channels (73% overall: Kenya 69%, Uganda 72%, Tanzania 79%), with 33% offering export services (Kenya 25%, Uganda 50%, Tanzania 21%), and 25% providing compliance and certification support (Kenya 25%, Uganda 28%, Tanzania 21%).

c) **Production and client volumes:** Nearly half of production firms (45%) reported annual outputs of less than 10 Metric Tonnes (MT), with Tanzania and Uganda highest at 48% each and Kenya at 41%. About 31% produced 10–50 MT (Kenya 41%, Uganda 24%, Tanzania 24%), 17% produced 51–100 MT (Kenya 19%, Uganda 12%, Tanzania 20%), and 11% produced more than 100 MT (Kenya 3%, Uganda 18%, Tanzania 12%). Output increased notably with firm age: 35% of companies older than 10 years exceeded 100 MT versus only 4% of those under 5 years. Among service providers (n=34), client bases varied widely: 6% served fewer than 10 clients, 26% served 10–50 clients, 32% served 51–100, and 35% served over 100 clients annually. Country analysis revealed Kenyan providers (n=14) mostly in the 10–50 clients range (43%) and over 100 clients (36%), Ugandan providers (n=5) largely serving 51–100 clients (60%), and Tanzanian providers (n=15) skewed towards over 100 clients (40%) and 51–100 clients (33%), highlighting larger client portfolios among older firms.

d) **Market reach:** Survey participants sold across multiple market tiers: 78% in local community markets (Kenya 78%, Uganda 88%, Tanzania 64%), 55% nationally (Kenya 38%, Uganda 61%, Tanzania 72%), 31% regionally (Kenya 19%, Uganda 39%, Tanzania 36%) and 28% internationally (Kenya 14%, Uganda 33%, Tanzania 44%). Uganda led national (61%) and export (33%) sales, Tanzania led in regional (36%) and global (44%) trade, and Kenya remained strongest locally (78%). Market reach grew significantly with firm maturity: 28% of mid-career companies (6–10 years) exported, compared to 19% of start-ups (1–5 years), and mature firms (over 10 years) achieved 59% of international sales.

e) **Distribution channels:** Companies employed multi-channel distribution strategies: 82% sold directly to consumers, 59% used wholesalers, 52% engaged agents, 45% stocked retail chains, and 24% leveraged courier services. Direct-to-consumer sales were most common across all countries, reflecting strong local brand trust. Wholesalers and agents supported market scale-up, with Kenyan firms heavily utilizing wholesalers (88%) and agents, and Tanzanian firms emphasizing retail channels (79%). The use of courier services (24%) to deliver organic products highlights the increased adoption of e-commerce, facilitating access to niche and remote markets, particularly for younger firms expanding into distant domestic or international markets.

f) **Identification and prioritization of firms for support:** Across Kenya, Uganda, and Tanzania, the study assessed export-readiness on a 9–43 scale and found a modest overall mean score of 20.65 (SD 5.70) among 95 firms. Country means reveal that Kenyan companies are the least prepared, with an average score of 19.30 (SD 5.77, n=37), while Ugandan firms score highest at 22.06 (SD 5.66, n=33), and Tanzanian firms sit in the middle at 20.80 (SD 5.39, n=25). When grouped into Low (9–20), Moderate (21–30), and High (31–43) readiness, only 8 percent of firms across the three markets achieved High readiness. A majority, 55 percent overall, remain in the Low category, including 68 percent of Kenyan, 48 percent of Ugandan, and 52 percent of Tanzanian firms. Moderate readiness covers 37 percent of all firms (24% in Kenya, 45% in Uganda, and 44% in Tanzania). These patterns highlight Kenya's urgent need for foundational export-capability support, while Uganda and Tanzania require targeted investments, particularly in standards compliance, certification, cold-chain infrastructure, packaging, and documentation—to elevate their moderately ready firms.

3.2.1 Primary production focus, legal status and longevity

The study utilized a list of purposively selected companies provided by the respective national organic movements and associations in Kenya, Uganda and Tanzania. As a result, the 95 respondents represented companies already formally or informally linked to the different production sectors rather than the full universe of companies in the three countries. Study findings therefore profiled this engaged subset of companies and should not be interpreted as nationally representative.

Within this purposive sample, organic practice dominated. Overall, almost three out of four firms surveyed (74 %) reported producing exclusively under organic methods. This self-reported share of organic companies stood at 65 % among surveyed respondents in Kenya, 76 % in Uganda and 84 % in Tanzania.

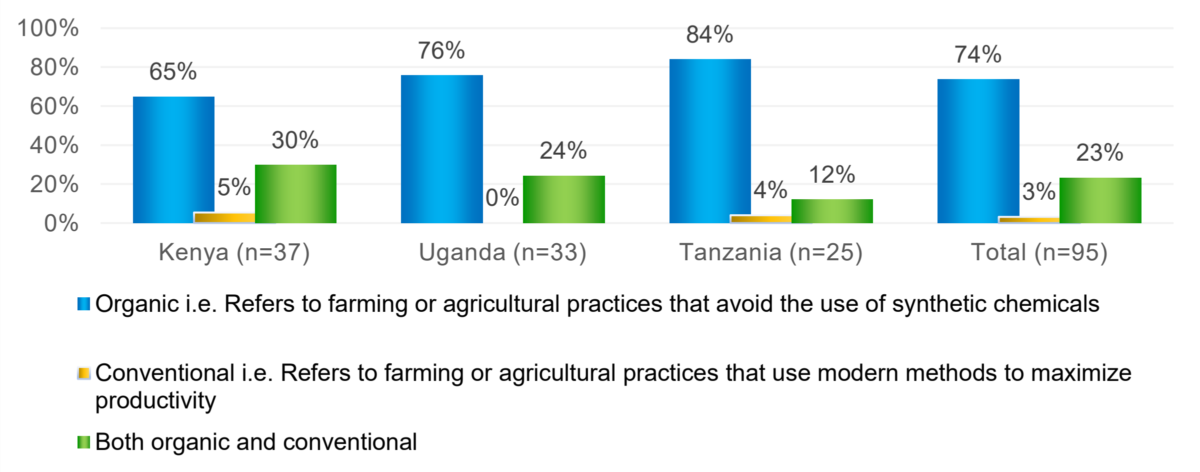

Figure 6: *Proportion of companies reporting the type of farming or production their businesses primarily focus on*

As shown in **Figure 6**, exclusively conventional farming was marginal: only three percent of surveyed companies spread across Kenya and Tanzania relied solely on modern high-input practices. A further 23 % adopted hybrid strategies, operating organic and conventional production practices. The hybrid share was most common among surveyed firms in Kenya (30 %), compared to 24 % in Uganda and 12 % in Tanzania.

Key informants contextualised these data. A Ugandan sector official explained that *"the companies you call conventional here are actually very good candidates for organic certification and trade at the regional level,"* highlighting a potential pipeline of companies moving toward certification. Internal catalogues generated during events such as National Organic Week and annual surveys, the informants added, helped national movements maintain *"a fair picture of which companies were organic and which companies were conventional or transitioning."* These databases enable clear identification and tracking of companies at various stages of organic certification readiness.

> *"We provided the list of companies to be surveyed. Some companies that you call conventional here are actually very good candidates for organic certification… We have firms certified by UNBS and organic bodies, trading locally, regionally, and internationally. Others are in the process of attaining certification and are prime candidates for regional organic trade. Our National Organic Week database helps us identify which companies meet these criteria, product relevance, existing certifications, and traceable physical locations verified through UNBS documents and GPS data."*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

According to study findings, essential factors informing the categorization include product relevance to local and regional markets, certification status from recognized bodies such as the Uganda National Bureau of Standards (UNBS) and organic certifying organizations, and traceability. This was noted by the key informants who reported stringent verification processes: *"Companies must be registered with legal entities such as the Uganda Registration Services Bureau (URSB), and they must have a physical, verifiable location."* Thus, while certifications from UNBS and organic certification bodies confirm these prerequisites hence reducing the necessity of extensive physical validation, key informants mentioned supplementary site visits and GPS tracking as essential elements of traceability and accurate location verification. The informant clarified, *"Organic certification would not happen for a company that's a briefcase company. Part of the certification process involves GPS-based traceability to verify the company's physical location"* thus suggesting that their ability to trace the few conventional companies in their respective databases means that these companies already possess the infrastructure to transition into organic trade.

Overall, the study findings confirm the sector's structured approach to organic certification and trade readiness, leveraging both formal verification mechanisms and direct engagement with companies. As noted in the above discussion, key informants affirm certification as an important variable for facilitating companies' transition from domestic to regional and international organic markets.

Further, within the provided list of companies provided by the NOAMs, the study findings (**Table 3**) show a clear preference for fully-registered corporate structures: 56 percent of all companies reported operating as limited-liability companies (LLCs). As shown in Table 1, country patterns vary with Tanzanian respondents reporting the highest formalisation, with more than two-thirds (68%) organised as LLCs. Kenyan firms followed at 49 percent, while their Ugandan counterparts reported an average of 55 percent. Further analysis shows that Ugandan companies favour cooperatives (24%), a choice that echoes the National Organic Agriculture Policy's emphasis on group marketing and collective certification[78]. Approximately five percent of surveyed companies in Kenya and Tanzania reported being registered as Cooperative.

Table 3: *Proportion of surveyed companies reporting their legal status*

Question	Legal status	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
a2. What type of entity is your business?	Sole proprietorship	19%	12%	28%	**19%**
	Partnership	27%	0%	0%	**11%**
	Limited liability company	49%	55%	68%	**56%**
	Cooperative	5%	24%	4%	**12%**
	Other	0%	9%	0%	**3%**
	Total	**100%**	**100%**	**100%**	**100%**

Interviews with key informants underline why formal registration is critical. A Ugandan sector official noted thus, *"If a company has a legal character, it is registered… Organic certification would not happen for a briefcase company."* Thus, respondents link LLC status to easier access to quality marks and international organic seals, both of which serve as passports to

[78]Ministry of Agriculture, Animal Industry and Fisheries, 2019. The National Organic Agriculture Policy, 2019. https://www.agriculture.go.ug/wp-content/uploads/2020/09/National-Organic-Agriculture-Policy.pdf

regional markets[79]. Literature on East African organic exporters corroborates this view, showing that businesses scale more rapidly once they convert from sole ownership to limited-liability structures that can absorb audit and certification costs.

Study data on the length of operation sheds light on how experience, relationships and organisational structures support organic trade expansion in the region. According to study findings, more than half of all respondents (51%) reported operating between one and five years, indicating recent entrants to the organic sector. A further 31% reported having traded for six to ten years, while 18% indicated more than a decade ago.

At country level (**Table 4**), just over half (51%) in Kenya, 42% in Uganda and 60% in Tanzania fell in the 1—5-year bracket. Further, approximately one in every ten surveyed companies in Kenya (11%) and Tanzania (12%) reported having been in business for over a decade. Contrastingly, approximately one out of every three surveyed companies in Uganda (30%) had operated for more than a decade.

Interviewed key informants noted that seasoned firms *"already traded locally, regionally and internationally",* thus alluding to the critical role of business longevity in the organic value chains. Uganda's larger share of decade-old companies reflects its National Organic Agriculture Policy, which has encouraged cooperative marketing and business clusters since the early 2000s. By contrast, a higher proportion of relatively young companies in Tanzania point to a recent wave of start-ups that followed the government's endorsement of EAOPS[80]. Together, the numbers back up earlier findings that clear policies and good institutional support help companies grow faster and build strong networks. Thus, the role of clear policies and proper institutional support in helping the growth of companies is noted.

Table 4: *Proportion of surveyed companies reporting length of operation*

Question	Length of operation	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
a4. How long has your business been operating?	Less than 1 year	3%	0%	0%	**1%**
	1–5 years	51%	42%	60%	**51%**
	6–10 years	35%	27%	28%	**31%**
	Over 10 years	11%	30%	12%	**18%**
	Total	**100%**	**100%**	**100%**	**100%**

Survey respondents reported multiple roles across the agricultural value chain, reflecting both diversification and specialization among companies linked to national organic networks. Overall, two-thirds of firms (66%) engaged in processing and value addition, while 59% remained primary producers. Marketing and distribution were mentioned by nearly one out of

[79]GIZ, 2021. Sector Brief Uganda: Organic Agriculture. https://www.giz.de/de/downloads/SectorBrief_Uganda_Organic-Agriculture.pdf

[80]Philippe Ninnin. Domestic markets for the East African organic agriculture. The place of institutions, standards and certification. IIABA work package 3: Participatory Guarantee Systems (PGS). 2023. ffhal-04521817. https://hal.science/hal-04521817v1/file/Standards%2C%20certification%20and%20institutions%20for%20EA%20domestic%20markets.pdf

every two respondents (51%), input supply by 36%, and support services (advisory, certification, logistics or finance) by 31%.

Study findings (**Figure 7**) showed that surveyed companies covered a broad spectrum of value-chain activities, with many companies undertaking multiple roles rather than focusing on a single function. Overall, 59% of the surveyed firms (95) reported primary production, such as farming, livestock or aquaculture, while 66% engaged in processing and value addition. Marketing and distribution followed closely at 51%, input supply at 36% and support services (including advisory, certification, logistics or finance) at 31%. A Kenyan key informant confirmed this diversity, noting, "Most of the company do more than one role like production and processing, export a nd trading, other local marketing."

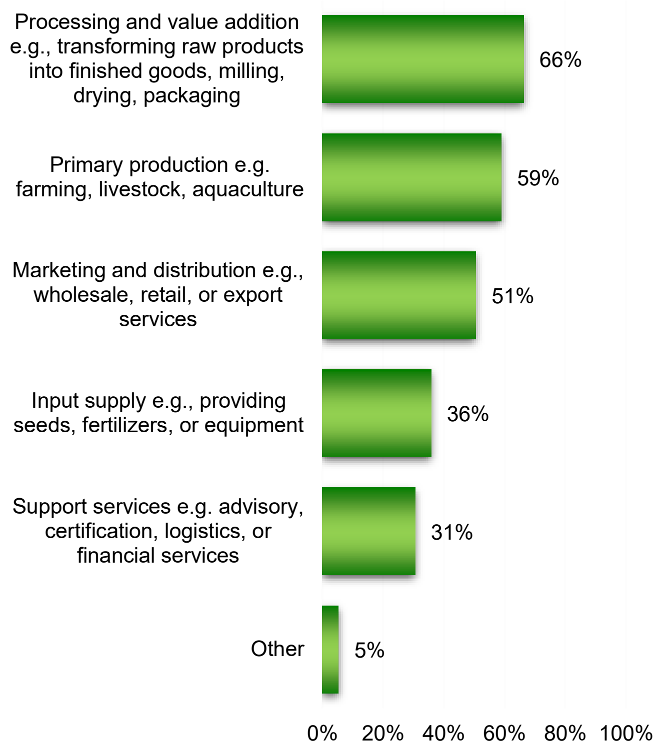

Figure 7: *Proportion of companies reporting the type of farming or production their businesses primarily focus on*

Country comparisons reveal distinct patterns. In Kenya, 70% of respondents reported being involved in primary production, 41% in processing, 43% in handling marketing or distribution, input suppliers made up 32%, while support-service providers accounted for 24%. By contrast, Uganda's respondents leaned heavily towards processing (79%) and marketing (55%), with fewer firms (48%) reporting that they were producers. Input supply (48%) and support services (39%) also ranked above the regional average. In Tanzania, 88% of surveyed companies reported were in processing, 56% indicated marketing, 56% were in production, 24% supplied inputs, and 28% offered services.

The dominance of processing and marketing functions among surveyed companies suggests that certified firms prioritize value addition and market access which are critical for scaling under EAOPS. Of note, the substantial share of input suppliers and support-service providers indicate a maturing value chain in which firms already support peers through seeds, equipment, technical advice and certification assistance. Thus, the study data from companies and key informants reveal an integrated value chain involving primary producers, processors, marketing agents and service providers.

3.2.2 Products and services

Study findings reveal an organic sector primarily focused on vegetables, grains, and fruits, with emerging niches in aquaculture, livestock, and speciality products. Further, the growing emphasis on the processing of produce, especially mangoes, potatoes, coconut and avocado reveals a need for targeted support to help companies scale up value addition.

According to study data (**Table 5**), surveyed companies specialise in a diverse range of products along the agricultural value chain. Overall, vegetables topped the list, with 64% of the 56 surveyed companies involved in production. Half of the respondents reported dealing in grains, 46% focused on fruits, 41% handled livestock and 29% engaged in aquaculture.

Table 5: *Proportion of surveyed companies reporting about the products or services they specialize in*

Question	Products	s3. Country of operation.			Total (n=56)
		Kenya (n=26)	Uganda (n=16)	Tanzania (n=14)	
$a7a. Which products or services does your company specialize in within the agricultural value chain that you have mentioned above? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	Fruits	54%	38%	43%	**46%**
	Vegetables	73%	50%	64%	**64%**
	Grains	46%	63%	43%	**50%**
	Livestock	58%	31%	21%	**41%**
	Aquaculture	27%	31%	29%	**29%**
	Other	23%	44%	29%	**30%**
	Total	**100%**	**100%**	**100%**	**100%**

Country breakdowns reveal variations in specialization. In Kenya (n=26), vegetables dominated at 73%, followed by livestock (58%), fruits (54%), grains (46%), and aquaculture (27%). Ugandan companies (n=16) essentially produce grains (63%), vegetables and other categories, each accounting for 50% and 44%, respectively. Fruits appear in 38% of cases, livestock in 31%, and aquaculture in 31%. Tanzanian (n=14) reported the highest proportion of companies dealing in vegetables (64%), fruits (43%), grains (43%), aquaculture (29%), and livestock (21%).

Key informants from certification bodies confirmed that fruits, vegetables, cereals and tubers featured most frequently under organic certification. One informant noted, "Crops like fruits, vegetables, cereals and tuber are most frequently under certification," while another added, "Crops like avocado, macadamia, tea, herbal teas, and coffee."

> *"Crops like fruits, vegetables, cereals and tuber are most frequently under certification. Also we have crops like avocado, macadamia, tea, herbal teas, and coffee."*

Official, Certification body, Kenya

A look at processing and value addition within the three East African countries reveals a processing sector characterised by strong foundations in fruits, vegetables, and packaging, as well as growing grain milling and cosmetic lines and emerging niches in high-value tropical oils. These capacities provide a solid foundation for targeted support under EAOPS to enhance regional and export-oriented organic trade.

According to study data (**Table 6**), surveyed companies offer a range of processing and value-added services, with nearly half (48%) specialising in fruit and vegetable products, such as juices and canned goods, and an equal share (48%) handling packaging and labelling. Grains accounted for the next largest segment, at 38%, while cosmetic products (including oils, soaps, and fragrances) made up 27%. Livestock processing (dairy, meat) comprised just 16%, and 27% identified other processed goods.

Table 6: *Proportion of surveyed companies reporting specialization in processing and value addition*

Question	Product	s3. Country of operation.			Total (n=63)
		Kenya (n=15)	Uganda (n=26)	Tanzania (n=22)	
$a7. Which products or services does your company specialize in within Processing and value addition? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	Grains e.g., flour production	13%	42%	50%	38%
	Fruits and vegetables e.g., juices, canned goods	73%	42%	36%	48%
	Livestock products e.g., dairy, meat processing	40%	12%	5%	16%
	Cosmetic products e.g. oils, soaps, fragrances	7%	27%	41%	27%
	Packaging and labelling	47%	50%	45%	48%
	Other	33%	31%	18%	27%
	Total	**100%**	**100%**	**100%**	**100%**

Country comparisons revealed a distinct focus. In Kenya, 73% of the 15 processing firms dealt in fruits and vegetables, 47% provided packaging and labelling, 40% handled livestock products, 33% offered other services, 13% milled grains, and 7% produced cosmetics. Ugandan processors are mainly involved in packaging (50%) and processed grains and fruits/vegetables (42%) while a lower proportion of companies are mainly involved in cosmetics (27%), and 12% handled livestock. Tanzanian companies reported an inclination towards grain milling (50%), cosmetic production (41%), packaging (45%), fruits and vegetables (36%), and livestock (5%).

Interviewed key informants also reported rising demand for processing and value addition across several product lines. While the key informants noted an increase in processing of produce such as mango, potatoes, avocado, coconut (mainly involving transforming fresh fruit into puree, juice, jam or crisps, cold-pressed oil), they highlighted that cooperative capacity still lagged behind these requests.

> *"For processing, there has been an increase in mango processing, from fresh mangos to puree, juice, jam, and crisps. Requests for processed products, such as sweet potatoes and others, are also on the rise. There's also cold pressed avocado oil, coconut oil, coconut milk. However, groups' capacity for processing is still low."*

Official, Certification body, Kenya

Further analysis of study data (**Table 7**) shows that 48 surveyed companies provided a diverse range of marketing and distribution services, with wholesale distribution being the most prevalent at 79%, followed closely by retail distribution at 73%. One-third of respondents provided export services, 6% engaged in marketing and promotional activities, and a quarter handled compliance and certification.

Table 7: *Proportion of surveyed companies reporting being involved in marketing and distribution*

Question	Marketing and distribution	s3. Country of operation.			Total (n=48)
		Kenya (n=16)	Uganda (n=18)	Tanzania (n=14)	
$a7. Which products or services does your company specialize in within the agricultural value chain that you have mentioned above? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	Wholesale distribution	88%	78%	71%	**79%**
	Retail distribution	69%	72%	79%	**73%**
	Export services	25%	50%	21%	**33%**
	Marketing and promotion	56%	67%	57%	**60%**
	Compliance and certification	25%	28%	21%	**25%**
	Other	6%	6%	7%	**6%**
	Total	**100%**	**100%**	**100%**	**100%**

Analysis by country reveals that Kenyan respondents (n=16) were mainly in wholesale (88%) and retail (69%), with only a quarter offering export services. Ugandan companies (n=18) reported similarly high levels of retail services (72%) and marketing/promotion (67%), with half of them involved in export logistics. Tanzanian firms (n=14) showed the highest retail share (79%) and a substantial wholesale presence (71%), with only 21% providing export services. Compliance roles accounted for approximately one in four across all three countries.

Key informants confirmed that many clients combined farming, processing and marketing functions*: "Most of the companies along the organic value chain do more than one role like production and processing, export and trading, others engage in local marketing."* They also noted that the marketing of organic products and services remained a critical gap, citing a lack of knowledge of marketing techniques to access global markets and third-party certifications. Thus, while surveyed firms provide marketing and distribution services, those involved in production and processing often have inadequate capacity to market their products and services.

> *"For most of our SMEs, you find that marketing is a problem for them and as NOGAMU, we try to support them by training them on marketing of organic products and services. There is skills gap and where additional capacity building is required is in marketing techniques, how to meet the global markets."*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

Informants further highlighted that the growing urban demand for healthy, traceable food and EAOPS-driven trade facilitation across the EAC opened new opportunities. Thus, by reinforcing marketing and export skills among service providers, surveyed companies can leverage these channels to expand their organic trade in East Africa and beyond.

> *"There is an increasing demand for healthy, chemical-free, and traceable food in urban areas… The East African Organic Product Standards (EAOPS) facilitate cross-border trade within the East African Community (EAC). This reduces trade barriers for organic products across the EAC; thus, traders should take advantage of this fact."*

Official, Regulatory Authority, Kenya

3.2.3 Production and client volumes

When asked about their approximate annual production or service volumes (**Table 8**), 45% of the 95 surveyed companies reported output below 10 metric tons (or equivalent units), 31% fell in the 10–50 tons range, 17% in the 51–100 tons bracket, and 11% exceeded 100 tons. These figures reflect a predominantly small-to-medium scale profile among companies already linked to organic networks.

Table 8: *Proportion of surveyed companies reporting production volumes*

a8. What is the approximate annual production or service volume of the selected items?	Country of operation			Years of operation				Total (n=95
	Kenya (n=37)	Uganda (n=33)	Tanzania (n=25	Less than 1 year (n=1)	1–5 years (n=48)	6–10 years (n=29)	Over 10 years (n=17	
< 10 metric tons or units	41%	48%	48%	100%	54%	31%	41%	**45%**
10–50 metric tons or units	41%	24%	24%	0%	33%	38%	12%	**31%**
51–100 metric tons or units	19%	12%	20%	0%	15%	24%	12%	**17%**
> 100 metric tons or units	3%	18%	12%	0%	4%	7%	35%	**11%**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100%**

Country-level analysis reveals that 41% of Kenyan respondents produced under 10 tons, another 41% reported 10–50 tons, 19% reached 51–100 tons, and just 3% exceeded 100 tons. In Uganda, nearly half (48 per cent) reported quantities below 10 tons, 24 per cent recorded 10–50 tons, 12 per cent reported 51–100 tons, and 18 per cent indicated quantities exceeding 100 tons. Similarly, 48% of surveyed firms in Tanzania operated under 10 tons, 24% reported 10–50 tons, 20% indicated 51–100 tons, and 12% exceeded 100 tons.

When cross-tabulated with years in operation, the data revealed that newer companies tended to have smaller outputs while older firms achieved higher volumes. Specifically, for companies older than ten years, 41% fell under 10 tons, 12% reached 10–50 tons, 12% reported 51–100 tons, and a notable 35% exceeded 100 tons. Contrastingly, for firms that have been operating for 1–5 years, 54 per cent produced under 10 tons, 33 per cent reached 10–50 tons, 15 per cent reported 51–100 tons, and 4 per cent exceeded 100 tons.

This pattern suggests that as companies matured, they scaled up their production or services, likely by expanding farmer out-grower networks, investing in processing facilities, or strengthening distribution channels.

A Kenyan key informant noted that volumes were increasing, although exact figures, especially for exports, remained difficult to determine. For the domestic market alone, the informant reported an estimated annual turnover of half a billion Kenyan shillings. He added that about 60 farmers held organic certification for export, while some 10,000 served the local market. This testimony aligns with the survey findings that larger, older companies drive export volumes, whereas newer and smaller firms focus on domestic sales.

> *"Regarding annual production volumes and overall sales/revenue trends of organic companies, volumes are increasing though difficult to give exact figures especially for*

> *export market, for domestic market the volumes is ½ billion annual turnover. 60 farmers certified organic for export market, 10,000 farmers for local market." ."*

Official, Kenya Organic Agriculture Network (KOAN)

Study findings further showed that 34 of the 95 surveyed companies offered marketing, distribution or support services (**Table 9**). These service providers varied widely in their annual client base: 6% served fewer than ten clients, 26% handled 10–50 clients, 32% managed 51–100 clients, and 35% reported serving over 100 clients each year.

Table 9: *Proportion of surveyed companies reporting client volumes*

Question	Client volume	a4. How long has your business been operating?			Total (n=34)
		1–5 years (n=16)	6–10 years (n=12)	10 years (n=6)	
a9. If you provide services (Marketing and distribution and Support Services), what is the approximate number of clients you serve per year?	< 10 clients	6%	0%	17%	**6%**
	10–50 clients	13%	50%	17%	**26%**
	51–100 clients	44%	25%	17%	**32%**
	> 100 clients	38%	25%	50%	**35%**
	Total	**100%**	**100%**	**100%**	**100%**

In Kenya (n=14), 36% of service firms worked with more than 100 clients, 43% supported 10–50 clients, and 21% served 51–100 clients. Ugandan providers (n=5) skewed toward mid-range volumes, with 60 per cent serving 51–100 clients, 20 per cent serving over 100, and no firm reporting fewer than ten. In Tanzania (n=15), 40% managed over 100 clients, 33% served 51–100, and 13% served 10–50.

When broken down by production focus, purely organic service firms (n=26) tended to have larger portfolios: 35% served over 100 clients, 35% handled 51–100 clients, and 31% handled 10–50 clients.

Study results also reveal the role of years of experience on client base. Among those in business for one to five years (n=16), 38% served over 100 clients, 44% served 51–100, and 13% served 10–50. Mid-career firms with six to ten years of operation (n=12) displayed a similar spread: 25% served over 100, 25% served 51–100, and 50% served 10–50. The most seasoned providers (those with over ten years of experience, n=6) dominated the top tier with 50% serving more than 100 clients annually, thus indicating how longevity fosters broader customer networks.

Key informants noted that larger, older service firms drove network growth by offering certification guidance, logistics coordination and bulk-distribution channels, services that newer entrants had yet to scale.

3.2.4 Market reach

Study findings show that surveyed companies served a mix of local, national, regional and international markets, reflecting the study's aim to map export readiness under EAOPS. Overall, 78% of the 95 respondents reported selling in local community markets, 55% reached national buyers, 31% traded regionally within East Africa, and 28% exported beyond the continent.

Country differences emerged. In Kenya (n=37), 78% of surveyed firms indicated that they sold locally, 38% served national markets, 19% traded regionally, and 14% exported internationally. Uganda's sample (n=33) leaned more toward domestic reach, with 88% in local markets, 61% nationally, 39% regionally, and 33% exporting abroad. In Tanzania (n=25), 64% sold locally, 72% nationally, 36% regionally, and 44% globally.

When broken down by production focus, purely organic respondents (n=70) dominated local (80%) and national (57%) sales while also driving regional (29%) and international (23%) exports. Hybrid operators (n=22) sold through local (77%), national (50%), regional (36%) and global (50%) channels.

Further analysis of study findings shows that longevity influenced market reach. Among 1–5-year-old firms (n=48), 81% sold locally, 54% nationally, 25% regionally, and 19% internationally. Mid-career companies (6–10 years, n=29) expanded into 76% local, 66% national, 41% regional, and 28% global markets. The most established companies (those with over 10 years of experience, n=17) achieved sales of 71% local, 41% national, 29% regional, and 59% international.

Key informants in Kenya confirmed these patterns and identified the top organic exports, *"Avocados, Macadamia, Avocado oil, Herbal teas, Tea, Essential oil, Baobab, coffee and coconut"* and noted that only 2% of total revenue came from organic exports versus 98% from conventional lines. They added that organic sales accounted for 20% of local revenues and had grown steadily year over year. According to the key informant, by the end of 2024, surveyed networks had certified 63,200 farmers across 173,120 hectares, with primary exports to Germany, France, the UK, the US, and Japan. These data show how market diversification and certification drive the regional and international expansion that EAOPS aims to foster.

> *"Fresh Avocados, Macadamia, Avocado oil, Herbal teas, Tea, Essential oil, Baobab, coffee and coconut are the types of products primarily exported as organic mainly to German, France, UK, US and Japan. Current proportion is organic 2%, conventional 98%. Local market organic 20%, conventional 80%. There is annual growth in organic. By end of 2024 total land under organic was 173,120ha of land and 6,320 farmers certified organic."*

Official, Kenya Organic Agriculture Network (KOAN)

3.2.5 Distribution channels

To investigate one of the study's objectives, which aimed to map how companies connect to regional and international markets, the study asked surveyed firms about the primary distribution channels they use to reach these markets. Study findings reveal multi-channel strategies involving a mix of traditional and modern distribution networks to meet the diverse needs of various market segments mainly local consumers, national retailers, regional agents, and international customers.

According to the study findings (**Figure 8**), surveyed companies heavily relied on direct-to-consumer channels as the main distributional channel of choice, with 82% of the 95 respondents selling directly to end-users. Wholesalers served as the second most common avenue (59%), followed by agents (52%) and retail chains (45%). Courier services played a lesser but still significant role (24%), particularly for firms that export or serve distant domestic customers.

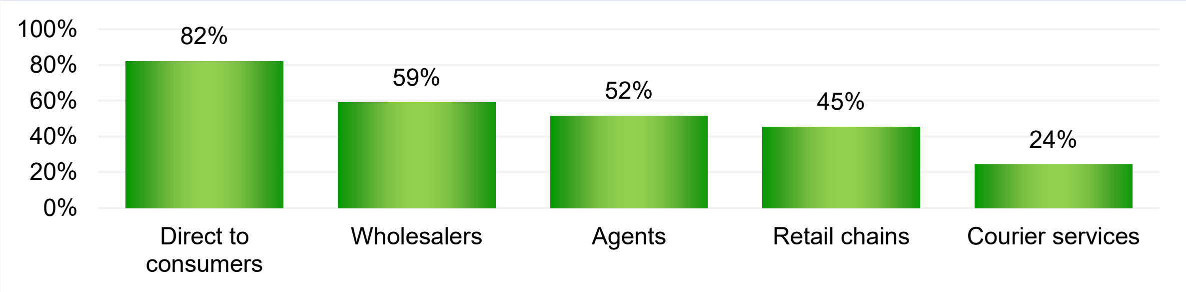

Figure 8: *Proportion of companies reporting the type of farming or production their businesses primarily focus on*

The dominance of direct-to-consumer sales reflected strong local brand recognition and trust in organic labels, a point confirmed by key informants, who noted that consumers often seek certified products through farmgate outlets or farmers' markets.

> *"Export market for organic produce/ products is expanding. Also, there is change in consumers' preference to organic products and buying them directly from the farms."*

Official, Kenya Organic Agriculture Network (KOAN)

Notably, the robust use of wholesalers and agents indicated that many companies partnered with established supply-chain actors to scale beyond their immediate networks. Retail chains, used by nearly half of the respondents, signalled growing supermarket demand for organic goods, especially in urban centres. The 24% uptake of courier services also suggests the emergence of e-commerce and parcel-based delivery models, which offer a pathway for younger firms to reach niche buyers abroad or in remote areas within their respective domestic markets.

3.2.6 Identification of 16 firms for export-readiness support

A key study objective was to identify 16 companies per country with potential for organic trade expansion and most in need of export-readiness support. To identify the sixteen firms in each country, the study first translated each company's responses on ten key dimensions, certification readiness, compliance with international quality standards, quality-control mechanisms, cold-storage capacity, export-packaging readiness, transport and logistics reliability, market knowledge, export-documentation experience, export-contract readiness, and willingness to invest in upgrades, into numeric scores (higher = more ready). See **table 10** for further reference.

Table 10: *Survey questions used to assess export-readiness of surveyed companies*

d4. Which statement best describes your company's readiness to obtain or upgrade certifications for export markets? (ONE ANSWER ONLY)	
1	Not prepared to invest in certification at this time
2	Considering applying for EAOPS or other organic certifications within the next 12 months
3	In the process of obtaining new/updated certifications
4	Fully certified and current with all necessary export certifications
d5. Which of the following best describes your company's current compliance with international quality standards? (ONE ANSWER ONLY)	
1	No compliance measures in place beyond basic domestic regulations

2 Partial compliance or working towards full compliance with international quality standards
3 Fully compliant with internationally recognized quality and safety standards
4 Exceeds standard compliance through continuous quality improvement initiatives

d6. Which quality control mechanisms does your company currently have in place? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)

0 None
1 Basic visual inspection
2 Testing for chemical residues, pathogens, or contaminants
3 Dedicated quality control staff and lab facilities
4 Traceability systems (batch coding, digital records)

d7. How would you describe your company's cold storage and post-harvest handling infrastructure? (ONE ANSWER ONLY)

1 No cold storage or specialized handling facilities
2 Limited cold storage capacity, suitable for small batches
3 Adequate cold storage and handling facilities meeting basic export requirements
4 Advanced cold chain infrastructure capable of handling large volumes consistently and maintaining strict quality standards

d8. How prepared is your company's packaging and labeling for export markets? (ONE ANSWER ONLY)

1 Basic packaging with no specialized export labeling
2 Packaging that meets domestic standards but not fully adapted for export market requirements
3 Packaging and labeling designed to meet targeted export market regulations (e.g., organic logos, language requirements)
4 High-quality, market-specific packaging and labeling that aligns with multiple international standards

d9. Which statement best describes your company's access to efficient transport and logistics solutions? (ONE ANSWER ONLY)

1 Long and unpredictable lead times with frequent delays
2 Moderate lead times with occasional delays
3 Generally reliable supply chain with predictable lead times
4 Highly efficient and reliable supply chain with minimal delays

d10. How would you describe your company's knowledge of its target export markets? (ONE ANSWER ONLY)

1 No knowledge or research on export markets
2 Some preliminary research but limited market intelligence
3 Moderate understanding of target markets (customer preferences, competition, pricing)
4 In-depth market knowledge supported by research, buyer feedback, or previous export experience

d11. How would you describe your company's experience with export documentation and customs procedures? (ONE ANSWER ONLY)

1 No experience; unfamiliar with export documentation requirements
2 Limited experience; some staff have knowledge of basic export procedures
3 Moderate experience; able to handle typical documentation and customs clearance
4 Extensive experience; streamlined processes for export compliance and documentation

d12. Which of the following best describes your company's existing export contracts? (ONE ANSWER ONLY)

1 Informal agreements or verbal commitments from buyers
2 Formal letters of intent from potential buyers
3 Existing contractual agreements with regular international customers
4 No informal or formal agreements so far

d14. How willing is your company to invest in upgrading its infrastructure to meet export requirements? (ONE ANSWER ONLY)

1	Not willing at this time
2	Possibly, if external support or financing is available
3	Likely to invest in incremental improvements (e.g., cold storage, packaging)
4	Already investing or prepared to invest in significant upgrades

The study summed the ten-item scores to yield an Aggregate Export Readiness Score ranging from 9 (for the least prepared) to 43 (for the most prepared).

Next, within each country (Kenya, Uganda, Tanzania), the study ordered companies from highest to lowest on this aggregate score, assigning Rank 1 to the firm with the highest readiness and incrementing downward. Finally, to pinpoint those with the greatest need for assistance, the sixteen lowest-ranked firms in each national cohort, that is, the sixteen companies with the smallest aggregate scores (and hence the highest numerical ranks), were flagged as priority candidates for targeted support. This process ensured a transparent and comparable selection across all three countries, focusing on firms least equipped to meet export market requirements without external assistance.

Thus, guided by the above methodology, the study analyzed the export readiness of firms across Kenya, Uganda, and Tanzania. Based on aggregate scores ranging from 9 (least prepared) to 43 (most prepared), the study recorded an overall mean aggregate export readiness score of 20.65 for the three countries. This score reflects modest readiness among all the assessed 95 companies. A higher variability (standard deviation of 5.70) highlighted considerable differences in company capabilities within and across the countries.

Country-level analyses (**Table 11**) revealed distinct levels of export readiness. With a mean score of 19.30, surveyed Kenyan firms showed the lowest export readiness score and the highest variability of 5.77, indicating uneven preparedness levels and significant disparities among individual firms. On the other hand, surveyed firms in Uganda and Tanzania exhibited higher mean readiness scores of 22.06 and 20.80, respectively, and equally high variability of 5.66 for Uganda and 5.39 for Tanzania).

Table 11: *Country analysis of the level of export-readiness of surveyed companies*

s3. Country of operation.	Mean	N (Sample size of firms)	Std. Deviation
Kenya	19.2973	37	5.77285
Uganda	22.0606	33	5.65652
Tanzania	20.8000	25	5.38516
Total	**20.6526**	**95**	**5.69951**

Amongst the 16 lowly ranked companies, study results show an overall low readiness level (mean=16.81) among these firms, with Kenya scoring lowest (mean=14.69), and Uganda (mean=17.75) and Tanzania (mean=18.00) somewhat better prepared.

The study further categorized companies into three distinct groups: low readiness (scores 9–20), moderate readiness (scores 21–30), and high readiness (scores 31–43). Based on this categorization, the study findings (**Table 12**) show that only 8% of firms across the three countries achieved high export readiness, highlighting substantial gaps and the need for targeted interventions. The majority of firms (55%), comprising 68% of firms in Kenya, 52% in Tanzania, and 48% in Uganda, fall into the low readiness category.

Table 12: *Categorization of surveyed companies based on export readiness levels*

Metric	Score category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
Export Readiness score	Low readiness **(9-20)**	68%	42%	52%	**55%**
	Moderate readiness **(21-30)**	24%	45%	44%	**37%**
	High readiness **(31-43)**	8%	12%	4%	**8%**
	Total	**100%**	**100%**	**100%**	**100%**

In terms of the 16 lowly ranked companies on the export-readiness scale, all Kenyan firms (100%) fell into the low readiness category, highlighting an urgent need for foundational support, while Uganda (81% for low readiness and 19% for moderate readiness) and Tanzania (69% for low readiness and 31% for moderate readiness) exhibited slightly better baseline capabilities. None of the 16 firms fell in the high readiness category.

These findings have critical implications for strategic support and intervention. Kenya requires extensive support to build foundational capabilities in export readiness. Uganda and Tanzania, although somewhat better positioned, still require tailored assistance aimed at enhancing their moderate capabilities, particularly in terms of compliance with quality standards, certification processes, cold-chain infrastructure, packaging, and documentation. These study results call for strategic investments and targeted technical support for low-readiness companies across all three countries, leveraging their expressed willingness to invest and addressing critical infrastructure and capability gaps.

3.3 Objective 2: Document the stage of growth and development of the companies in terms of outputs, spatial coverage, personnel, and infrastructure development.

Introduction

The objective of this phase of the study was to assess the capacity and operational maturity of companies trading in organic products in Kenya, Uganda, and Tanzania to provide a clear understanding of where these companies stand in terms of their growth, development, and overall readiness for market expansion.

Key data points used included company size, production outputs, geographic reach, and infrastructure capacity, such as processing facilities and storage capabilities. The study used several key indicators, including production volumes and export frequency to evaluate company development. In addition, companies were assessed at different stages of growth, from startups to well-established companies.

Summary of findings

a) **Stage of growth of companies:** Firms span the full business lifecycle: 22% are startups (less than 3 years, limited presence), 46% are in early growth (building market share), 9% are established (steady outputs), 20% in expansion mode (broadening), and just 2% mature (well-recognized domestically and internationally). Kenya's distribution closely matches the regional average, featuring startups (24%), early growth (43%), and a notable mature segment (5%). Uganda skews strongly toward early growth (48%) and expansion phases (27%), with no mature firms. Tanzania mirrors regional growth phases, with startups at 24% and early growth at 48%, but also has no firms yet at maturity.

b) **Organic production:** Organic adoption is notably high across all countries: 40% of companies report over 75% of their output as organic, 25% at 51–75%, 23% at 26–50%, 7% at 1–25%, and only 4% remain fully conventional. Tanzania leads with 44% of firms achieving 75% or more organic growth, followed closely by Kenya at 41% and Uganda at 36%. Uganda stands out with a higher share (12%) in the lower organic bracket (1–25%), reflecting active efforts by NGOs and CSOs to transition conventional farmers toward organic practices.

c) **Access to domestic markets:** Domestic reach varies considerably, with 43% serving a single county or district, 32% trading regionally, and 25% having national coverage. Kenyan firms predominantly operate locally (49%), while Ugandan companies balance local (45%) with a substantial national presence (27%), and Tanzanian firms boast the broadest national coverage at 36%. Company age strongly influences market reach: 29% of young companies (1–5 years) trade nationally compared to 35% among mature companies (over 10 years).

d) **Access to export markets:** Currently, 18% of exporters exclusively export organic products, 11% export both organic and conventional goods, and 5% export conventional products only. A significant 55% plan future organic exports, while 12% have no export intentions. Kenyan firms notably lead in future export plans (62%), but only 8% currently export organic. Uganda has a strong current organic export presence at 24%, with 48% planning further growth. Similarly, Tanzania now exports 24% of its organic products and plans to export 52% in the future. Main export markets include Germany, Denmark, Italy, Netherlands, France, the UK, the US, Japan, and Middle Eastern hubs.

e) **Export plans:** Looking ahead, 59% of companies plan to enter or expand into regional or international markets within 2–5 years, while 39% aim to consolidate their domestic reach, with just 2% having no expansion plans. Kenya demonstrates balanced intentions, with 43% aiming internationally; Uganda has a stronger regional and international focus at 58%; Tanzania leads substantially, with 84% targeting cross-border growth. Expansion preferences differ by firm size: mid-sized firms consolidate domestically, whereas early-growth and mature companies actively pursue export opportunities.

f) **Workforce training and experience:** Workforce capacity gaps are pronounced: 45% of companies report only minimal (1–25%) staff training in organic practices, 23% report a majority (51–75%) trained, 15% have about half (26–50%), and 8% each report either most staff trained (>75%) or none at all. Uganda exhibits a higher proportion of companies (30%), with roughly half of its workforce trained, but it still faces substantial challenges in documentation and traceability. Kenya and Tanzania exhibit similar shortfalls, highlighting the urgent need for structured, ongoing training programs.

g) **Current production or processing infrastructure:** The infrastructure remains largely basic, with 55% relying on manual, limited-equipment setups, 36% moderately mechanized, and only 9% featuring well-developed or advanced facilities. Kenya (57%), Tanzania (56%), and Uganda (52%) each have over half their firms using basic setups, and fewer than 10% in each country possess advanced infrastructure. Significant constraints include poor storage, uncalibrated scales, inadequate packaging, and weak traceability, highlighting the urgent need for targeted upgrades.

h) **Alignment with organic standards:** Full alignment with organic standards is low at 12%, while 21% are mostly aligned, 55% are partially aligned (requiring significant adjustments), and 13% need major overhauls. Kenya and Tanzania each report higher rates of fully aligned firms (14–16%) compared to Uganda (6%). Uganda notably exhibits the highest proportion requiring partial alignment (70%), highlighting widespread infrastructural and procedural gaps.

i) **Planned infrastructure investment:** Nearly all companies plan infrastructure improvements; 27% have clear budgets and plans, 69% plan investments conditionally, and only 3% have no plans. Uganda leads in defined budgets (33%), followed by Kenya (27%) and Tanzania (20%), revealing clear opportunities for targeted grants and concessional loans to facilitate investment.

j) **Growth expectations under expanded organic practices:** A majority (61%) predict significant growth in output and market coverage in 2–5 years if organic practices deepen; 34% foresee moderate improvements, 4% minimal changes, and 1% remain uncertain. Kenyan firms are the most optimistic (68% expect significant growth), followed closely by Tanzanian companies (64%), while Ugandan companies express slightly more caution (52%). The level of optimism correlates closely with existing progress on certification, infrastructure, and market development.

3.3.1 Stage of growth of companies

Study findings (**Figure 9**) showed that respondents spanned all stages of business development, reflecting a dynamic mix of startups, scale-ups and veteran companies. Overall, 22% of the 95 surveyed companies described themselves as startups (under three years old with limited market presence), 46% identified as being in early growth (establishing market presence and increasing output), and 9% considered themselves established (with steady market presence and stable outputs). A further 20% reported being in expansion mode (increasing products, services, markets, or facilities), and just 2% considered themselves as mature (well-recognized with a stable or growing domestic and international presence).

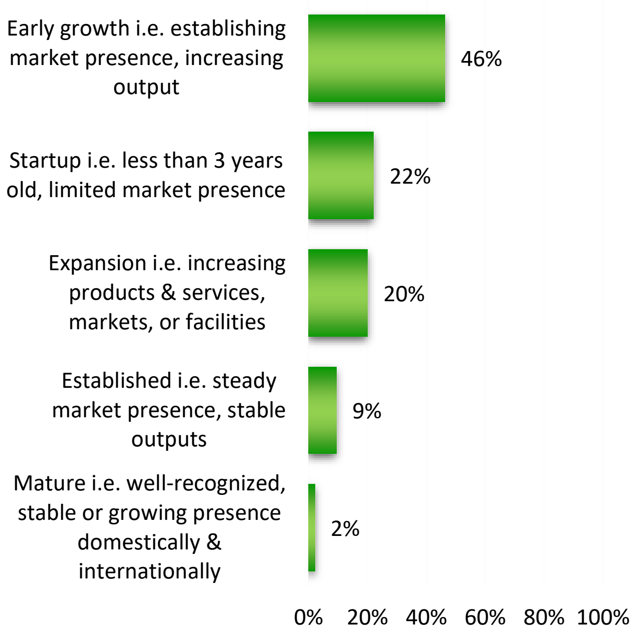

Figure 9: *Proportion of surveyed companies describing the current stage of their company's development (n=95)*

Country breakdowns (**Table 13)** reveal slight variations. In Kenya (n=37), the distribution was as follows: 24% were startups, 43% were in early growth, 14% were established, 14% were in expansion, and 5% were mature. Ugandan companies (n=33) were skewed toward growth phases: 18% were startups, 48% were in the early growth phase, 6% were established, and 27% were in expansion, with none yet having reached mature status. Tanzanian firms (n=25) mirrored Kenya in startups at 24%, matched Uganda in early growth at 48%, and 8% were established, 20% were in expansion, and none (0%) were mature.

Table 13: *Proportion of surveyed companies describing the current stage of their company's development*

Market	s3. Country of operation.			Total (n=95)
	Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
Startup i.e. less than 3 years old, limited market presence	24%	18%	24%	**22%**
Early growth i.e. establishing market presence, increasing output	43%	48%	48%	**46%**
Established i.e. steady market presence, stable outputs	14%	6%	8%	**9%**
Expansion i.e. increasing products & services, markets, or facilities	14%	27%	20%	**20%**
Mature i.e. well-recognized, stable or growing presence domestically & internationally	5%	0%	0%	**2%**
Total	100%	100%	100%	100%

Key informants from national organic movements noted that startups and early-growth companies primarily targeted domestic and regional markets because they lacked the organization, capital, and certification status required to meet stricter international requirements. In addition, these two segments would drive demand for certification support, value-added facilities, and market linkages, while established and mature players would offer mentorship and services. The relatively low share of mature companies highlighted an opportunity for targeted capacity-building for expansion-stage respondents who could accelerate their progress into the mature category.

> *"Startups and early-growth companies are typically small, loosely organized, and in need of both certification support and working capital. As a result, they focus on domestic and regional markets, where certification requirements, such as those set by UNBS, are less stringent than those for international markets."*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

3.3.2 Organic production

Study results further indicate widespread organic adoption among companies linked to the national organic agriculture movements (NOAMs) with country-level differences reflecting certification status, market strategy and the support roles of NGOs and CSOs in driving high organic shares.

According to the study findings, most surveyed companies across the three countries reported a high organic output share, reflecting the study's objective to gauge uptake of EAOPS. Overall, 40% of the 95 respondents reported that more than three-quarters of their output was organic, while 25% fell in the 51–75% bracket, 23% reported 26–50% organic, 7% recorded 1–25%, and 4% remained fully conventional (0% organic).

Country comparisons (**Table 14**) revealed variations in organic integration. In Kenya (n=37), 41% achieved over 75% organic output, 22% reported 51–75%, 30% fell in the 26–50% range, 3% were at 1–25%, and 5% remained entirely conventional. Ugandan firms (n=33) showed 36% with over 75%, 24% at 51–75%, 24% in the 26–50% tier, 12% at 1–25%, and 3% conventional. Tanzanian respondents (n=25) led with 44% over 75% organic, 32% at 51–75%, 12% at 26–50%, 8% at 1–25%, and 4% conventional.

Table 14: *Proportion of surveyed companies describing the percentage of their total output that is currently (or would potentially be) organic*

Question	Market	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
b2. What percentage of your total output is currently (or would potentially be) organic?	0%	5%	3%	4%	**4%**
	1–25%	3%	12%	8%	**7%**
	26–50%	30%	24%	12%	**23%**
	51–75%	22%	24%	32%	**25%**
	Over 75%	41%	36%	44%	**40%**
	Total	**100%**	**100%**	**100%**	**100%**

Key informants contextualized these statistics. Uganda's NOGAMU noted, *"The companies that we are dealing with … are operating within the organic space. Yes, some of them are yet to attain certification, but they are buying raw materials from organic sources,"* highlighting why even uncertified firms reported high organic proportions.

In Kenya, a KOAN representative highlighted challenges behind the 4–7 percent low-organic tiers.

> *"Most of the companies are we are dealing with are organic, a few like Olivado are dual hence do both organic and conventional fresh avocadoes and oil. The merit for organic and convention is wide range of market. The demerit is the requirement of vigorous checks of quality control to control mixing organic and nonorganic, records to prove compliance, cleaning equipment, processing machine and storage among others."*

Official, Kenya Organic Agriculture Network (KOAN)

A TOAM official in Tanzania further explained why 44 percent of Tanzanian firms reported over 75 percent organic output.

> *"The majority of our partner organizations are CSOs/NGOs that empower farmers through training in Ecological Organic Agriculture (EOA) practices. Production is primarily driven by smallholder farmers and their associations, specializing in organically cultivated crops such as coffee, spices, avocados, and tea. While processing remains limited, it is an area of growing focus. Export is critical, particularly for high-value commodities like avocados, cocoa, coffee, and spices. The supply of approved organic inputs is also increasing, supported by companies like Plant Biodefender Ltd.."*

Official, Tanzania Organic Agriculture Movement (TOAM)

3.3.3 Access to domestic markets

Study findings (**Figure 10**) indicate varied domestic reach among the 95 surveyed companies, thus reflecting differing scales of operation and maturity. Overall, 43% of respondents operated locally within a single county or district, 32% had regional coverage across multiple districts, and 25% claimed national coverage.

Country comparisons revealed that Kenyan firms (n=37) skewed toward local markets, with 49% operating within one county, 35% active regionally, and 16% serving the entire country. Ugandan companies (n=33) presented a more national profile: 45% remained local, 27% expanded regionally, and 27% covered national markets. Tanzanian respondents (n=25) demonstrated the broadest domestic presence, with 32% limited to local areas, 32% spanning multiple districts, and 36% operating nationwide.

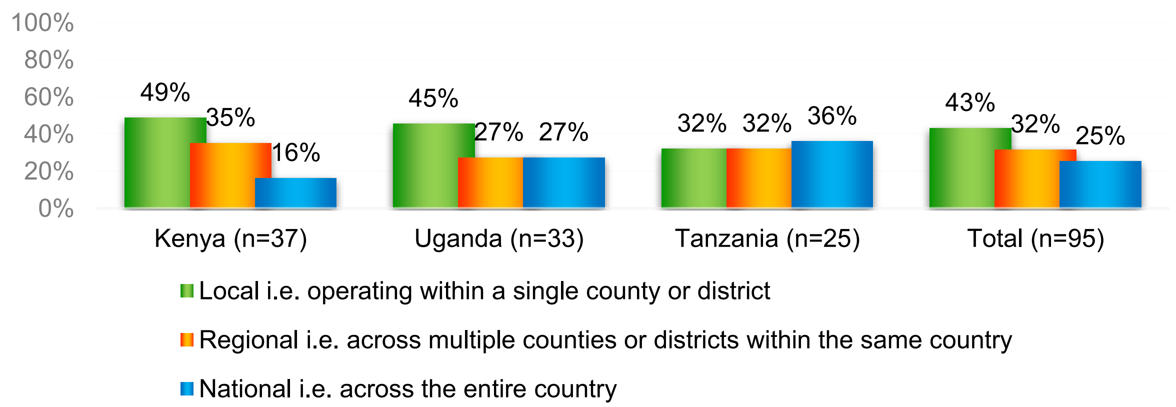

Figure 10: *Proportion of companies reporting their domestic geographic reach*

When linked to business age, the data suggested that maturity expanded geographic reach. The sole startup (less than one year) remained local. Among companies in operation for one to five years (n=48), 40% served only their home district, 31% traded regionally, and 29% sold nationally. Mid-career firms (six to ten years, n=29) shifted toward regional coverage, with 45% operating locally, 41% reaching a regional level, and 14% achieving a national presence. The most seasoned companies (those over ten years old, n=17) reported the widest networks, with 47% remaining local, 18% serving multiple districts, and 35% covering the entire country.

3.3.4 Access to export markets

The study also found that a majority of surveyed companies planned to enter export markets at the time of the survey, aligning with the study's objective to assess export readiness under EAOPS. Overall, 55% of the 95 respondents indicated that they were not currently exporting but planned to export organic products in the future. Eighteen per cent were already exporting organic products, 11% exported both organic and conventional goods, and 5% exported only conventional products. Only 12% neither exported nor planned to do so.

Country patterns (**Table 15**) revealed that Kenyan firms (n=37) led in future plans: 62% planned to export organics, while 8% were already exporting organic products, and 5% exported both streams. Nineteen per cent remained without export activity or plans. Among Ugandan companies (n=33), 48% intended to export organic products in the future, 24% were already exporting them, 9% exported both, and 12% had no export plans. Tanzanian respondents (n=25) exhibited a similar profile: 52% planned to export organic products, 24% were already exporting organic products, 20% planned to export both, and none lacked any export orientation.

***Table 15:** Proportion of surveyed companies indicating that they currently export or plan to export (organic or conventional) products/services*

Question	Market	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
b4. Does your company currently export or plan to export (organic or conventional) products/ services?	No exports and no plans to export	19%	12%	0%	**12%**
	Currently exporting conventional products only	5%	6%	4%	**5%**
	Currently exporting organic products	8%	24%	24%	**18%**
	Currently exporting both organic & conventional products	5%	9%	20%	**11%**
	Not exporting now but plan to export organic products in the future	62%	48%	52%	**55%**
	Total	**100%**	**100%**	**100%**	**100%**

Key informants contextualized these findings by describing the major destinations and strategic approaches employed. They noted that East African organic exports primarily flowed to the European Union, mainly to Germany, Denmark, Italy, the Netherlands, France, the UK, and Belgium, as well as to the US, Japan, China, and Middle Eastern markets such as Dubai and Oman. They further indicated that companies utilized trade fairs such as BioFach, association websites, and direct linkages to establish these export channels.

> *"These organic products are exported to EU, US. So, in the EU countries, Germany, number one, followed by Denmark, Italy, Netherlands, France, UK, Belgium. All these take our exports or import our goods. Those are the major ones. So we have some exports to Japan and China. And the middle East, Dubai, Abu Dhabi, Oman. Some exports going to Israel, to India. And in the region, of course, Kenya"*

Official, Association of Exporters, Uganda

One of the key informants observed a strategic trade-off that many organic companies faced: balancing the higher costs and stringent requirements of international markets against the stability and flexibility of domestic and regional channels. Describing local and regional markets as "cushioning or diversification opportunities," the informant highlighted how firms mitigate against international shocks such as sudden regulatory changes, currency fluctuations or global demand slumps. As earlier reported, Survey data showed that 55% of respondents planned future organic exports but were not yet exporting; these firms likely relied on domestic and regional sales to maintain cash flow as they prepared for international entry.

> *"The most significant destinations are the international markets. They're well-structured. Yes, it's expensive to attain certification for international market standards, but they're very structured, they give premiums, there is an incentive that comes with targeting that market. The requirements are tighter, but, yes, they are more interesting. Now, the international markets are for companies that are established and organized to export and trade internationally. Now, the domestic and regional markets, largely today, offer a cushioning or diversification opportunity for small firms and even the large firms in case something bad happens to the international market. There's a fallback position"*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

Informants emphasized that while certification costs for international markets remained high, established and organized companies found the premium returns well worth the investment, highlighting the strategic value of transitioning from local and regional niches into robust export markets.

3.3.5 Export plans

Study findings (**Figure 11**) reveal an organic sector poised for significant geographic diversification, both within East Africa and beyond. A majority of surveyed companies (59%) reported plans to broaden their market reach over the next two to five years while 39% expected to expand within their home countries. Only 2% of the 95 respondents had not planned any geographic expansion.

Country-level analysis reveals differing strategic emphases. In Kenya (n=37), 54% of respondents intended to expand into new regions within the country, while 43% planned to

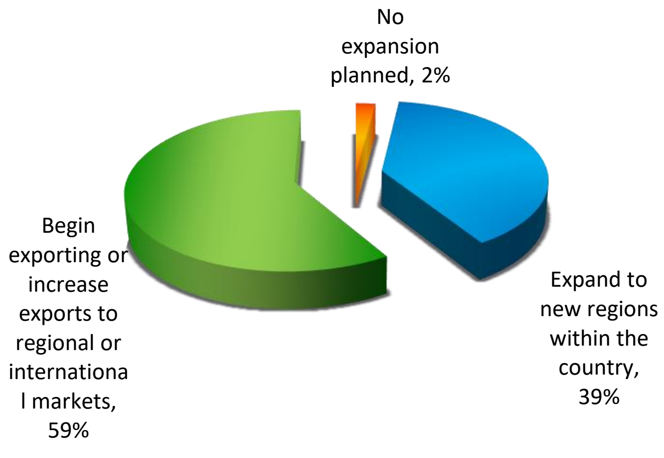

Figure 11: Proportion of companies reporting their expansion plans over the next 2–5 years

initiate or increase exports to regional or international markets, while only 3% had no expansion plans. Ugandan companies (n=33) demonstrated a stronger export focus, with 58% anticipating increasing exports into regional or international markets, 39% targeting expanding to new domestic regions, and 3% planning no change. Tanzanian respondents (n=25) led the way in export ambitions, with 84% eyeing regional or global customers, and 16% aimed to increase their domestic reach while none reported a lack of expansion plans.

Plans by surveyed companies to expand to regional/international markets or grow domestically highlight different growth trajectories for surveyed firms depending on their sizes. Specifically, mid-sized and established firms leveraged domestic expansion as a stepping stone, while early-growth and mature companies prioritized cross-border trade to capture international premiums. As earlier noted, key informants indicated that domestic market consolidation often preceded entry into stringent export markets.

3.3.6 Workforce training and experience

Surveyed companies varied widely in the proportion of staff with organic knowledge (**Figure 12**). Overall, 45% of respondents reported that only 1–25% of their workforce had relevant organic experience, 23% indicated a majority (51–75%), and a further 8% noted that most or all staff (over 75%) held training. Another 8% admitted to having no organic-trained personnel at all. These figures highlighted the uneven capacity that key informants reported as a critical barrier to scaling organic trade.

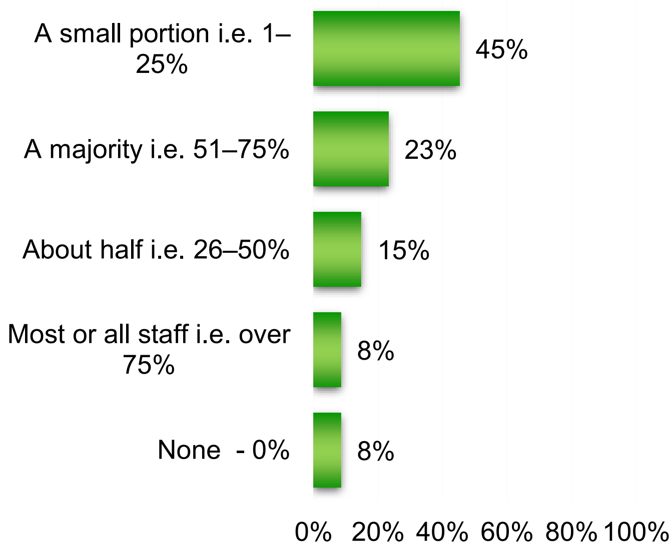

***Figure 12:** Proportion of surveyed companies reporting the percentage of their workforce that has training or experience in organic production, processing, or marketing*

Interviewed key informants rated staff knowledge low, around 3 out of 10, and stressed the need for frequent refresher courses as one certification-body representative explained, “Low knowledge like 3 out of 10. They require refresher training on past training and training to be done frequently.” This comment highlighted why nearly half of respondents had only minimal (1–25%) organic experience on their teams.

An observation by an official from a certification body highlights capacity gaps among certified and aspiring organic companies. By rating staff knowledge at just “3 out of 10,” the informant highlighted a pervasive shortfall in organic-specific expertise. Specifically, the key informant reported a tendency for skills to lapse without ongoing reinforcement, operational vulnerabilities such as poor record-keeping and weak traceability systems that can jeopardize certification and market access and, therefore, a need for hands-on guidance in establishing robust, in-house quality controls.

> *“They have low levels of organic-specific knowledge - like 3 out 10. They require refresher training on past training and trainings to be done frequently especially on*

> *organic practices to meet standards, keeping records because are not well kept and updated, poor traceability systems and how to undertake internal standards"*

Official, Certification body, Uganda

Country-level analysis (**Table 16**) revealed similar gaps. In Kenya (n=37), 41% had minimal (1–25%) organic training, 38% reported a majority (51–75%), 8% claimed most staff were trained, and 11% had none. Key informants from Kenya identified inconsistent quality control and inadequate record-keeping as symptoms of inadequate training. They recommended intensive training in maintaining records, internal standards, and certification procedures as essential to ensuring organic compliance and maximizing export opportunities.

Table 16: *Proportion of surveyed companies reporting the percentage of their workforce that has training or experience in organic production, processing, or marketing*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
b8. What percentage of your workforce has training or experience in organic production, processing, or marketing?	None i.e. 0%	11%	6%	8%	**8%**
	A small portion i.e. 1–25%	41%	45%	52%	**45%**
	About half i.e. 26–50%	3%	30%	12%	**15%**
	A majority i.e. 51–75%	38%	12%	16%	**23%**
	Most or all staff i.e. over 75%	8%	6%	12%	**8%**
	Total	**100%**	**100%**	**100%**	**100%**

In Uganda (n=33), 45% held minimal training, 30% reported about half (26–50%), and only 6% each had zero or over 75% trained. Approximately one half of surveyed firms in Tanzania (52%) had minimal training, 16% possessed a majority, and 12% boasted most or all staff trained. Key informants reported that companies in Uganda commonly faced challenges such as poor documentation practices and undeveloped traceability systems, both of which are directly linked to workforce capacity. They emphasized that staff generally had low familiarity with certification requirements, reinforcing the urgency for frequent, structured training interventions, particularly in record-keeping and traceability.

In Tanzania (n=25), approximately 52% of surveyed companies reported minimal training, 16% indicated that a majority of their staff had received training, and 12% stated that most or all of their staff had received training. Notably, informants from Tanzania interviewed highlighted significant limitations stemming from insufficient workforce skills, particularly the inability of many companies to consistently meet stringent international market demands due to inadequate in-house knowledge. They identified skills gaps, such as a lack of awareness of organic standards, internal auditing procedures, and practical organic farming solutions, as central areas requiring further training.

Informants recommended targeted refresher training on internal standard maintenance, certification procedures and organic production techniques. *"Additional training needed is to meet standards, records for certification, and how to undertake internal standards,"* noted one certification-body respondent. Further, the auditors highlighted the role of training in boosting yields and market access: *"They increase companies' knowledge and skills on organic production practices that lead to better yield, improve communication and feedback* *mechanism … build quality assurance and public trust on organic products hence access to market and economic benefits."*

Taken together, the quantitative data and verbatim data from key informants demonstrate a pressing need for structured, ongoing training programs backed by both NOAMs and certification bodies to elevate companies' staff competence from its current low baseline and support the region's organic scaling ambitions.

3.3.7 Current production or processing infrastructure

The infrastructure capacity among respondents remained largely basic, suggesting challenges in scaling up organic production and processing. Across the sample, 55% relied on basic infrastructure, utilising manual methods and limited equipment, 36% were moderately developed with some mechanisation, while only 4% were well-developed and 5% were highly advanced.

The heavy reliance on basic infrastructure, where 55% of surveyed companies still used manual methods and limited equipment, mirrors the practical hurdles described by key informants. A TOAM official in Tanzania highlighted that poor transport, storage, processing and packaging facilities undermine both product quality and traceability:

> *"The gap stems from lack of thorough understanding of the PGS structure and different roles and responsibilities of various actors along the value chain. Also, there is a lack of awareness of the benefit of the mark. There are challenges which are faced as a result of poor infrastructures for organic farmers from transportation, storage, processing, packaging, branding and marketing their products. As a system based on trust and guarantee, it is difficult for customers to trace products due to poor documentation and record keeping systems, hence, impairing trust"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Similarly, a KOAN representative in Kenya pointed out deficiencies in critical tools and systems:

> *"There is lack of good storage facilities, weighing scales not being calibrated regularly, lack of proper packaging materials and poor traceability due to lack of proper coding machines, computers for record keeping, … lack of different machines for processing organic and non-organic"*

Official, Kenya Organic Agriculture Network (KOAN)

The above qualitative data from key informants contextualize the survey's finding that only 9% of companies reported well-developed or highly advanced infrastructure. When 36% reported moderate mechanization, they likely refer to basic infrastructure, but without calibrated scales or digital traceability as reported by key informants.

Country-level patterns reinforce this general picture. Kenyan companies predominantly had basic infrastructure (57%), with 30% moderately developed, 8% well-developed, and 5% highly advanced. Ugandan respondents (52% basic, 45% moderate, and 3% highly advanced) also lacked significant advanced capabilities. Tanzanian companies followed similar trends (56% basic, 32% moderate), though with slightly higher advanced capabilities (4% well-developed, 8% highly advanced). These findings highlighted substantial room for infrastructure improvement across all countries.

Overall, the verbatim testimonies from the key informants explain why over half of all companies depend on basic infrastructure: systemic underinvestment in essential facilities, from calibrated scales to coded traceability systems, constrains organic value-chain growth and erodes customer trust. Thus, to scale regional trade, targeted infrastructure upgrades and training in documentation systems emerge as urgent priorities.

3.3.8 Alignment of facilities and processes with organic standards

Study findings (**Table 17**) showed that only 12% of surveyed companies reported being fully aligned with organic standards, meaning their facilities and processes already met or could easily adapt to EAOPS requirements. A further 21% indicated they were mostly aligned, requiring only minor modifications for certification. However, more than half (55%) stated they were only partially aligned, requiring significant adjustments, such as improved inputs or enhanced traceability systems, while 13% admitted their operations would necessitate a considerable overhaul to comply.

Table 17: *Proportion of surveyed companies reporting the extent to which their facilities and processes are currently aligned with organic standards*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
b11. To what extent are your facilities and processes currently aligned with organic standards?	Not at all i.e. would require major overhaul	19%	6%	12%	**13%**
	Partially i.e. some adjustments needed, e.g., changing inputs or improving traceability	46%	70%	48%	**55%**
	Mostly aligned i.e. minor modifications needed for certification	22%	18%	24%	**21%**
	Fully aligned i.e. already meet organic standards or easily adaptable	14%	6%	16%	**12%**
	Total	**100%**	**100%**	**100%**	**100%**

Country-level patterns revealed distinct readiness profiles. In Kenya (n=37), 14% claimed complete alignment, 22% mainly were aligned, 46% were partially aligned, and 19% required major overhauls. Ugandan companies (n=33) exhibited the highest partial alignment at 70%, with only 6% being fully aligned, 18% mostly aligned, and 6% requiring significant work. Tanzanian respondents (n=25) fell between the two extremes, with 16% fully aligned, 24% mostly aligned, 48% partially aligned, and 12% requiring significant changes.

These statistics echoed the capacity gaps identified by key informants. Both TOAM and KOAN officials highlighted weaknesses in traceability, storage and documentation systems, core elements of “partial alignment.” For example, poor record-keeping and uncalibrated weighing scales directly translate into companies’ inability to claim full or mostly aligned status. The 13% of firms requiring major overhaul likely correspond to those without basic infrastructure (55% of the sample).

Conversely, the small share of fully aligned companies represents the 9% of companies with well-developed or highly advanced infrastructure. According to the key informants, these firms have in place calibrated equipment, dedicated storage, and internal quality control protocols, enabling them to meet EAOPS standards with minimal additional effort.

Thus, while a minority of companies are ready for immediate certification, the majority must invest in targeted upgrades, particularly in traceability, input sourcing, and documentation, to achieve the compliance required for regional and international organic trade.

3.3.9 Planned infrastructure investment

According to study results (**Table 18**), nearly all surveyed companies planned to invest in some level of infrastructure to support organic production or certification over the next two years. Overall, 27% reported having clear plans and budgets in place, while 69% indicated they would invest "possibly, depending on market conditions and financial support." Only 3% had no such plans, and none disavowed interest in an organic transition.

Table 18: *Proportion of surveyed companies planning to invest in infrastructure improvements to support organic production or certification in the next two years*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
b12. Do you plan to invest in infrastructure improvements to support organic production or certification in the next two years?	Yes, we have a clear plan and budget	27%	33%	20%	**27%**
	Possibly, depending on market conditions and financial support	70%	64%	76%	**69%**
	Not at this time	3%	3%	4%	**3%**
	Not applicable i.e. not interested in organic transition	0%	0%	0%	**0%**
	Total	**100%**	**100%**	**100%**	**100%**

At the country level, 27% of Kenyan respondents had defined budgets, and 70% remained conditional on funding or market shifts. In Uganda, a higher proportion (33%) reported having clear investment plans, with 64% willing to proceed, pending external support. In Tanzania, while only 20% of companies secured dedicated budgets, approximately three out of every four (76%) expressed conditional willingness, pending market conditions and financial support.

These intentions align with the capacity gaps highlighted in the previous sections of this report, which assess production and processing infrastructure and the alignment of facilities and processes with organic standards. When 55% of companies operated with basic, largely manual infrastructure and 55% required only partial alignment with organic standards yet needed improvements in traceability, storage, and processing, this category of companies recognized the critical need for investment in infrastructure upgrades.

The 27% of firms with clear plans likely corresponded to the smaller cohort (9%) already boasting well-developed or highly advanced infrastructure. These mature players leveraged their stronger financial footing and market connections to budget proactively for further enhancements, such as automated traceability systems or certified storage facilities.

Additionally, the 69% who indicated they would invest, conditional on market conditions and financial support, point to a key opportunity for targeted financing and infrastructure grants.

The financial support will help the companies to enhance their compliance with organic standards and international markets. This support will help small and medium-sized firms strengthen their operations.

3.3.10 Expectations for growth under expanded organic practices

Study findings (**Table 19**) indicate that a majority of surveyed companies anticipated robust expansion if they adopted or deepened organic practices. Across all 95 respondents, 61% expected significant growth in outputs and market coverage over the next 2–5 years, while 34% forecast moderate, incremental improvements. Only 4% anticipated a steady state with minimal change, and a negligible 1% remained uncertain.

Table 19: *Proportion of surveyed companies reporting their expectations on their company's growth and development to progress in the next 2–5 years if adopting or expanding organic practices*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
b13. How do you expect your company's growth and development to progress in the next 2–5 years if adopting or expanding organic practices?	Significant growth in outputs and market coverage	68%	52%	64%	**61%**
	Moderate growth with incremental improvements	30%	39%	32%	**34%**
	Steady state with minimal changes	3%	6%	4%	**4%**
	Uncertain at this time	0%	3%	0%	**1%**
	Total	**100%**	**100%**	**100%**	**100%**

Country-level variations were evident. In Kenya (n=37), approximately seven out of every ten surveyed firms (68%) predicted significant growth, the highest among the three countries, reflecting strong confidence among Kenyan companies in the profitability and market pull of organic expansion. Another 30% expected moderate growth, and only 3% saw minimal change. In Uganda (n=33), half (52%) anticipated significant growth, while 39% envisioned moderate gains. A slightly higher share (6%) felt they would remain largely steady, and 3% were uncertain, suggesting slightly more cautious optimism compared to Kenya. In Tanzania (n=25), 64% projected significant growth, 32% expected moderate improvements, and 4% predicted minimal change, thus positioning Tanzania between Kenya and Uganda in terms of growth outlook.

These optimistic projections aligned with earlier findings: companies that developed partial or complete alignment with organic standards and planned infrastructure investments signalled readiness to scale. The higher optimism in Kenya and Tanzania corresponded to larger shares of firms with clear infrastructure plans and stronger market linkages. At the same time, Uganda's more measured forecast reflected a higher reliance on conditional investments and certification.

Overall, the study data show that surveyed companies link training, infrastructure, and certification with accelerated growth, expanded market coverage, and enhanced competitiveness both regionally and globally.

3.4 Objective 3: Identify scope, benefits, and contributions the companies are making to the local and national economy.

Introduction

The study also aimed to assess the economic impact that the companies are making on their local communities and the broader national economy in Kenya, Uganda, and Tanzania. This assessment will provide insights into how these companies contribute to economic development through various channels, including job creation, revenue generation, and support for local supply chains.

Thus, the study measured the direct and indirect contributions of the companies, focusing on key economic metrics such as employment, contributions to local supply chains, revenues and the broader social impact within their communities.

Summary of findings

a) **Employment trends over the past three years:** Overall, 78% of companies expanded their staff count between 2021 and 2024: 53% grew slightly, 25% grew significantly, while only 10% experienced a decline in staff count. Growth was strongest in Tanzania, with 92% of firms adding staff (72% grew slightly, 20% significantly). Kenya also showed strong employment growth at 78% (54% slight increase, 24% significant), while Uganda reported more moderate overall growth of 66% (36% slight, 30% significant). Mid-career companies (6–10 years) across all three countries demonstrated the highest employment expansion rate at 97%, indicating their role as key job creators.

b) **Workforce hiring practices:** Nearly half of all surveyed companies (49%) source over 75% of their employees from within a 50 km radius, highlighting the organic sector's critical role in local rural employment. Local hiring was most prevalent in Tanzania (64% of firms), followed by Kenya (54%) and Uganda (33%). Younger companies (1–5 years old) led in localized employment, with 56% hiring over 75% of staff locally, while mid-career firms had a broader hiring scope (45% hiring predominantly locally). This reflects the organic sector's foundational role in regional economic and community development.

c) **Revenue trends and scale:** Most companies remain micro- to medium-scale companies. Specifically, 57% of Kenyan firms earn under KES 1 million annually (30% under KES 500,000), similarly 57% of Ugandan companies earn under UGX 150 million (30% below UGX 15 million), and 50% of Tanzanian companies earn less than TZS 100 million annually. Over the past three years, revenue growth was most widespread in Tanzania, where 64% saw slight increases and 20% significant gains, closely mirrored by Uganda (61% slight increase, 15% significant) and Kenya (54% slight increase, 24% significant). Approximately 26% of all companies derive more than 75% of their turnover from organic products, highlighting the sector's emerging commercial viability, particularly notable in Tanzania (28%) and Uganda (27%), compared to Kenya's 24%.

d) **Future plans to enhance economic contributions:** Survey respondents across all countries outlined diversified growth strategies, with market expansion topping the list for 35% overall (Kenya 35%, Uganda 36%, Tanzania 32%). Certification to access premium markets was a priority especially in Tanzania (28%) and Uganda (27%), compared to only 8% in Kenya. Workforce training and supplier development investments were cited by 8%, consistently across countries. Sustainability and community engagement initiatives were noted by 11% overall, most prominently in Kenya (19%), suggesting a balanced approach by companies to pursue global market opportunities while reinforcing local economic impacts.

3.4.1 Employment trends over the past three years

Study findings (**Figure 13**) reveal that organic companies have experienced employment gains over the past three years. Specifically, surveyed companies broadly expanded their workforce between 2021 and 2024, with variation by country and firm age. Overall, 53% of respondents reported that employment levels “increased slightly,” while a further 25% saw levels “increase significantly.” Only 8% experienced a slight decrease, and a mere 2% reported a sharp reduction in headcount.

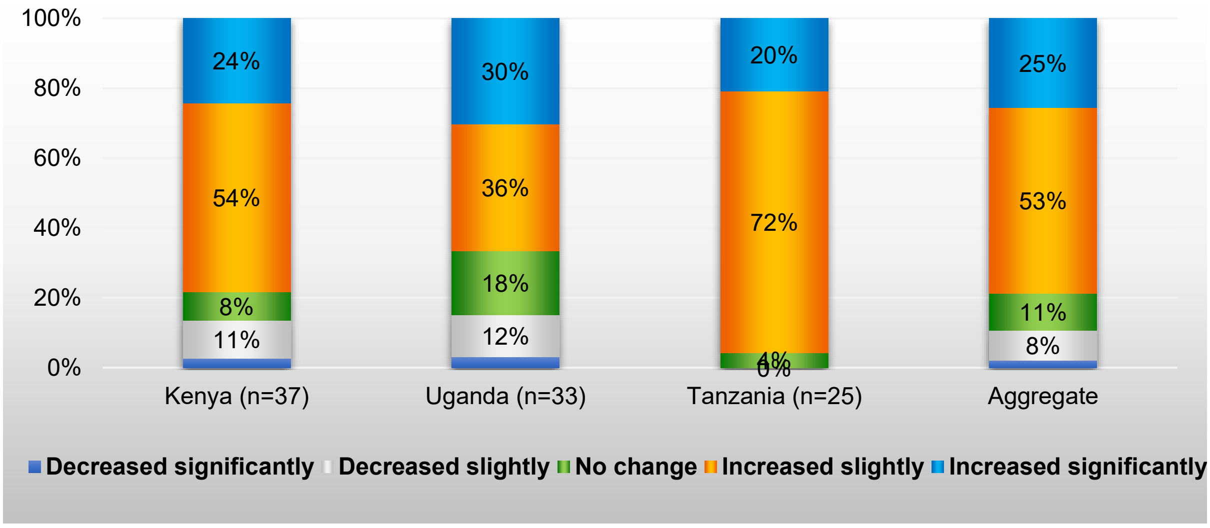

Figure 13: Proportion of surveyed companies reporting change in employment levels in their company over the last three years

As illustrated in **Figure 13**, country-level data indicate that growth was strongest in Tanzania, where 72% of firms added staff modestly, and 20% grew substantially, resulting in 92% of Tanzanian companies expanding their teams. Kenyan companies followed closely: 54% reported slight increases and 24% significant gains (78% growth overall), while Uganda showed more tempered growth, with 36% reporting slight rises and 30% notable increases (66% growth overall). A small share in Uganda (18%) and Kenya (8%) remained unchanged, and neither country reported any significant layoffs.

Firm age trends (**Table 20**) indicate that mid-career companies (6–10 years in operation) experienced the most robust hiring, with 52% significantly expanding their workforce and 45% growing slightly, resulting in an overall expansion rate of 97%. By contrast, the youngest companies (1–5 years old) reported more measured growth, with 56% experiencing slight growth and 17% experiencing significant growth (73% total growth), thus reflecting early-stage scaling. Established firms (over 10 years) also registered expansion, with 47% experiencing slight increases and 18% significant increases (65% total growth), despite a higher share (30%) experiencing slight or significant reductions (24% and 6%).

Table 20: *Firm age analysis of the proportion of surveyed companies reporting change in employment levels in their company over the last three years*

Question	Category	a4. How long has your business been operating?			Total (n=95)
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)	
c1. How have the employment levels in your company changed over the last three years?	Decreased significantly	2%	0%	6%	**2%**
	Decreased slightly	6%	3%	24%	**8%**
	No change	17%	0%	6%	**11%**
	Increased slightly	56%	52%	47%	**53%**
	Increased significantly	17%	45%	18%	**25%**
	Not applicable e.g., new company	2%	0%	0%	**1%**
	Total	**100%**	**100%**	**100%**	**100%**

Key informants attributed these trends to the continuous demand for organic products across local and export markets, enhanced by capacity-building initiatives and certification-driven market access. In Tanzania, the experts stated that these staffing increases stem directly from deeper engagement with local suppliers, smallholder farmers, and expanding export markets. They explained that companies forge “market linkages initiatives” with NGOs and donors to connect members’ databases, detailing locations, products and services, to local input suppliers and farmer groups. These collaborations scaled organic knowledge from individual communities to the national level, driving demand for ecological organic agriculture (EOA) inputs and stimulating new income opportunities for smallholder suppliers.

> *“Companies engage with local suppliers through different market linkages initiatives done by NGO’s through donor funded projects, and through TOAM Market linkages initiatives where we share the database of our members where valuable information such as location and products/ service offered are done. The knowledge for organic farming has been scaled up from community to national level, this driven by the presence of local suppliers for EOA inputs, NGO’s promoting Organic farming to smallholder farmers, and national strategies to promote Ecological Organic Agriculture.”*

KII, Tanzania Organic Agriculture Movement (TOAM)

Similarly, the experts described how export-led growth boosts local employment by creating jobs across the value chain, generating foreign exchange, and enhancing the national economic profile.

> *“Exporting by organic companies boosts local employment by creating jobs across the value chain, generates foreign exchange to stabilize the economy, and enhances the national economic profile through diversification, global competitiveness, and infrastructural growth.”*

KII, Tanzania Organic Agriculture Movement (TOAM)

Thus, the key informant data attributes the recorded employment expansion in the organic sector to integrated supply-chain partnerships, access to premium markets as a result of certification, and export diversification strategies.

Overall, the employment data confirm that organic-sector companies are scaling operations regionally, with mid-career firms driving the strongest job creation. At the same time, start-ups and veteran companies also contribute to ongoing workforce growth.

3.4.2 Workforce hiring practices among companies

When asked if they hire locally, within a 50 km radius, nearly half of all surveyed companies (49%) sourced over 75% of their workforce from communities within a 50 km radius, highlighting the significant local employment footprint of the organic sector (**Figure 14**). Beyond the majority, one in five companies (20%) employed between 51% and 75% local staff, and another 20% drew 25% to 50% of their employees from within a 50 km radius. Only 8% of firms reported that less than 25% of their workforce came from the immediate vicinity, indicating that purely external recruitment remained uncommon. A small share (2%) was unsure of their local hiring levels, suggesting limited human-resource tracking among a few respondents.

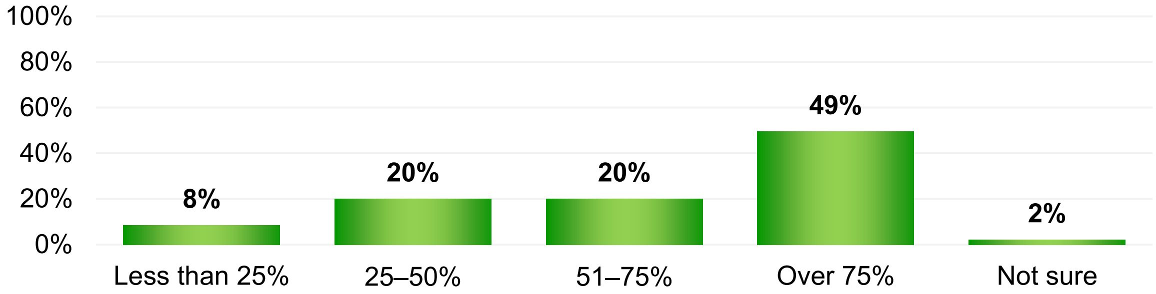

Figure 14: *Proportion of surveyed companies reporting hiring employees from local communities (within a 50 km radius)*

Country-level patterns (**Table 21**) varied: in Tanzania, 64% of respondents hired predominantly locally, reflecting close ties between farms, processors, and nearby villages. Kenyan firms followed, with 54% sourcing the majority of their staff locally, while one-third (33%) of Ugandan companies reported similar high local hiring practices.

Table 21: *Country analysis of the proportion of surveyed companies reporting hiring employees from local communities (within a 50 km radius)*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
c2. Approximately what percentage of your employees are drawn from local communities (within a 50 km radius)?	Less than 25%	8%	6%	12%	**8%**
	25–50%	19%	30%	8%	**20%**
	51–75%	19%	24%	16%	**20%**
	Over 75%	54%	33%	64%	**49%**
	Not sure	0%	6%	0%	**2%**
	Total	**100%**	**100%**	**100%**	**100%**

When linked to company maturity (**Table 22**), younger firms (1–5 years) were most likely to hire heavily from their local surroundings: 56% of such businesses recruited over 75% of their staff locally, and 17% hired between 51% and 75%. Mid-career companies (6–10 years) exhibited broader recruitment patterns: 45% hired predominantly locally, 31% employed 51–75% local staff, and 24% drew 25–50% of their staff from nearby communities. Among companies over 10 years old, local hiring remained high, with 41% sourcing most employees from the region. However, these mature firms also exhibited greater variation, with 18% hiring fewer than 25% of their employees locally.

Table 22: *Firm age analysis of the proportion of surveyed companies reporting hiring employees from local communities (within a 50 km radius)*

Question	**Category**	**a4. How long has your business been operating?**			**Total (n=95)**
		1–5 years (n=48)	**6–10 years (n=29)**	**10 years+ (n=17)**	
c2. Approximately what percentage of your employees are drawn from local communities (within a 50 km radius)?	Less than 25%	8%	0%	18%	**8%**
	25–50%	17%	24%	24%	**20%**
	51–75%	17%	31%	12%	**20%**
	Over 75%	56%	45%	41%	**49%**
	Not sure	2%	0%	6%	**2%**
	Total	**100%**	**100%**	**100%**	**100%**

3.4.3 Annual gross revenue and revenue trends

At the time of the survey, surveyed companies in all three countries primarily operated at small to medium revenue scales. According to the study data (**Figure 15**), approximately six out of ten (57%) of Kenyan companies (n=37) reported annual gross revenues of up to KES 1 million, with 30% under KES 500,000 and 27% in the KES 500,001–1 million range. A further 22% achieved KES 1.1–5 million, while only 3% reached KES 5.1–10 million. Meanwhile, 16% exceeded KES 10 million, and 3% preferred not to disclose. These figures indicate that nearly six in ten Kenyan companies remain at the micro-scale level, while 38% are mid-level, earning a revenue of over KES 1 million.

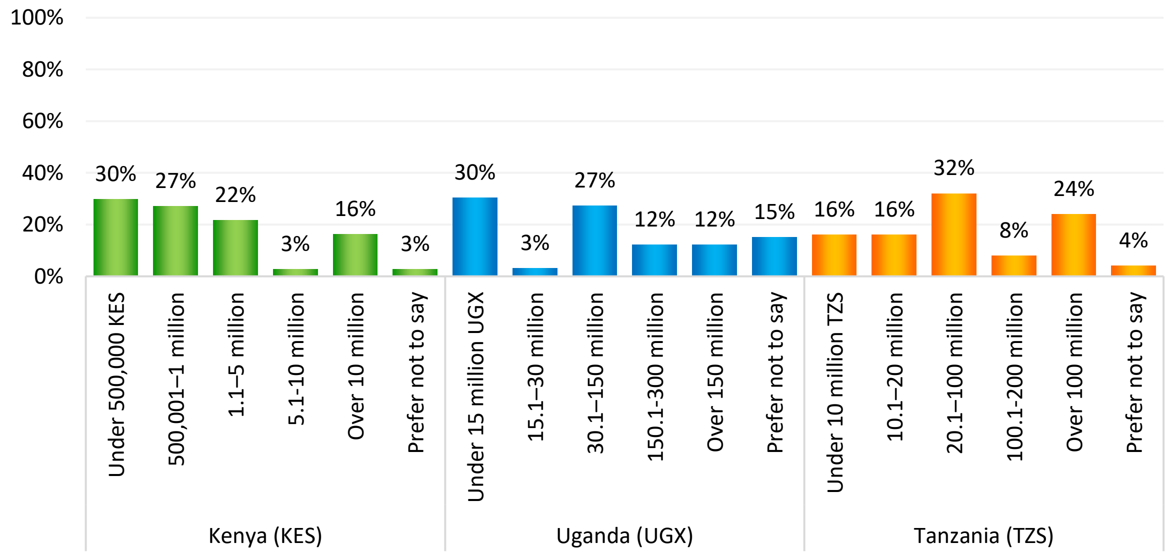

Figure 15: *Proportion of surveyed companies reporting the approximate Annual Gross Revenue of their businesses*

Of the 33 Ugandan companies surveyed, 30% reported revenues below UGX 15 million, and 27% fell in the UGX 30.1–150 million bracket. Just 3% earned UGX 15.1–30 million, while 12% each recorded UGX 150.1–300 million or above UGX 150 million. Notably, 15% declined to state their figures. In Tanzania **(n=25)**, survey data reveal a more evenly distributed revenue band: 16% reported an income of under TZS 10 million, and another 16% reported an income between TZS 10.1 million and TZS 20 million. The largest group (32%) earned between TZS 20.1 and 100 million, while 8% fell within the TZS 100.1–200 million band and 24% exceeded TZS 100 million. Thus, half of Tanzanian companies generated at least TZS 20 million annually, with nearly one-quarter operating at high-revenue levels above TZS 100 million.

Thus, across East Africa, the prevalence of smaller revenue bands (under KES 1 million, UGX 15 million, and TZS 20 million) illustrates the developing stage of many organic businesses. As noted, there are pockets of mid and high-revenue outliers, especially in Tanzania and Uganda, who may already possess the financial capacity to invest in certification, infrastructure, and market expansion. At the same time, the prevalence of micro-level companies among the surveyed firms presents an opportunity to offer targeted support in the form of finance, training, and market linkages to help them scale and benefit from premium organic market opportunities.

Further analysis of study data (**Table 23**)reveal growth in revenues among surveyed companies. Overall, 59% of surveyed companies reported slight increases in turnover, while 20% saw their revenues rise significantly. Only 11% reported a slight decrease, and 9% noted no change in revenue over the three years.

Table 23: *Overall and country-level analysis of companies' revenue trend over the past three years*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
c4. What has been the revenue trend over the past three years?	Decreased significantly	0%	0%	0%	**0%**
	Decreased slightly	14%	9%	8%	**11%**
	No change	8%	15%	4%	**9%**
	Increased slightly	54%	61%	64%	**59%**
	Increased significantly	24%	15%	20%	**20%**
	Not applicable i.e. new company or insufficient data	0%	0%	4%	**1%**
	Total	**100%**	**100%**	**100%**	**100%**

Across countries, Tanzania recorded modest growth, with 64% of firms reporting slight revenue increases, one in two (20%) recording significant revenue gains, 8% experiencing slight declines, and 4% reporting no change. Uganda experienced a similar trend, with 61% of companies reporting a slight increase in revenue and 15% achieving significant growth. A smaller proportion (9%) reported slight declines, and 15% saw flat revenues. In Kenya, 54% of companies experienced slight growth, 24% reported significant growth, 14% reported slight decreases, and 8% saw no change.

A look at firm age dynamics (**Table 24**) reveals that younger firms (1–5 years) reported modest revenue growth, with 63% experiencing slight increases and 17% achieving significant gains. Only 4% experienced slight declines, while 17% reported flat revenues, reflecting the revenue volatility common in young ventures. Among mid-career companies (6–10 years), 55% reported slight growth and 28% significant increases, 10% recorded slight declines, and just 3% had unchanged revenues. Older companies (those over 10 years old), on the other hand, reported more positive trends: 59% reported slight revenue growth, and 18% reported significant gains. However, a higher proportion (24%) experienced slight declines.

Table 24: *Overall and firm age analysis of companies' revenue trend over the past three years*

Question	Category	a4. How long has your business been operating?			Total (n=95)
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)	
c4. What has been the revenue trend over the past three years?	Decreased significantly	0%	0%	0%	**0%**
	Decreased slightly	4%	10%	24%	**11%**
	No change	17%	3%	0%	**9%**
	Increased slightly	63%	55%	59%	**59%**
	Increased significantly	17%	28%	18%	**20%**
	Not applicable i.e. new company or insufficient data	0%	3%	0%	**1%**
	Total	100%	100%	100%	**100%**

A review of revenue share from organic products over the last three years (**Figure 16**) shows that organic sales already account for a substantial share of overall turnover for most surveyed companies. Overall, 26% of respondents derived over 75% of their revenue from organic products, and another 22% received between 51% and 75% from organics. A further 21% recorded revenues of 26–50%, while 13% earned revenues of 1–25%. Only 11% had no organic revenue at the time of the survey, and 7% were unsure of the exact split.

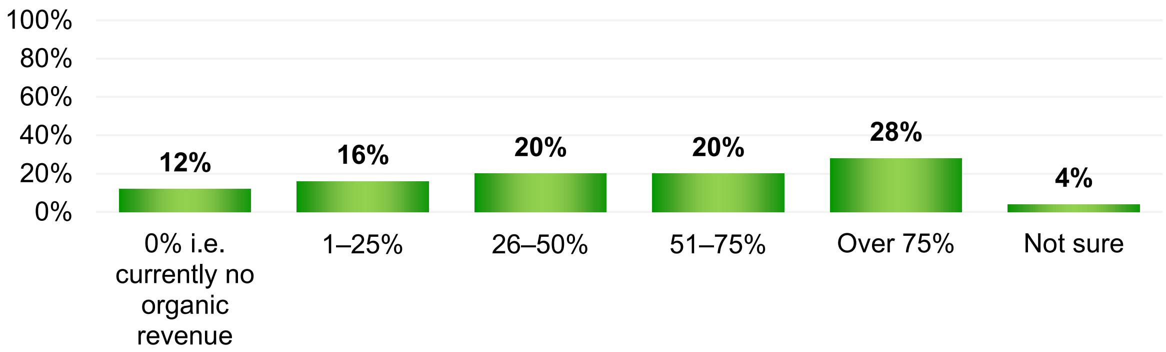

Figure 16: *Proportion of surveyed companies reporting hiring employees from local communities (within a 50 km radius)*

Tanzania led in high organic dependence, with 28% of firms generating over 75% of their revenue from organics and 20% falling in the 51–75% bracket. A combined 40% reported 1–50% organic share, while 12% had no organic sales. In Uganda, a similar trend was evident: 27% of companies earned over 75% of their revenue from organic products, and 21% fell within the 51–75% category. Only 3% had no organic revenue, though a notable 15% were unsure of their exact proportions.

Kenya displayed a more mixed profile: 24% of firms derived over 75% of their revenue from organics, and another 24% derived between 51% and 75%. However, 16% reported zero organic revenue, indicating a larger conventional cohort, while 8% earned just 1–25% of their revenue from organics.

These trends suggest that, while organic lines represent a dominant revenue source for a quarter of the surveyed companies, particularly in Tanzania and Uganda, a significant segment of Kenyan firms remains in the earlier stages of organic market development. Across the region, roughly two-thirds of companies already rely on organics for at least half their sales, highlighting the sector's commercial viability.

3.4.4 Future plans to enhance economic contributions

Study findings (**Figure 17**) show that surveyed companies across Kenya, Uganda, and Tanzania are proactively planning diversified strategies to strengthen their economic impact. These include market expansion as a priority, certification to access premium channels, local sourcing and workforce development, sustainability and community engagement.

(i) Market expansion: Overall, 35% of companies, comprising 35% in Kenya, 36% in Uganda, and 32% in Tanzania, identified expanding into new markets, either domestically or for export, as their top priority.

(ii) Certification to access premium markets: One in five surveyed companies (20%) planned to pursue or expand organic certification to access premium markets. This plan was more of a priority in Uganda (27%) and Tanzania (28%) than in Kenya (8%).

(iii) Local sourcing and workforce development: Approximately one in ten (12%) surveyed companies indicated that they intended to increase local sourcing of inputs, including seeds and fertilisers, with the strongest interest in Tanzania (16%). Additionally, 8% of companies across the three countries planned targeted investments in training and building the capacities of their employees or local suppliers to improve their compliance and competitiveness.

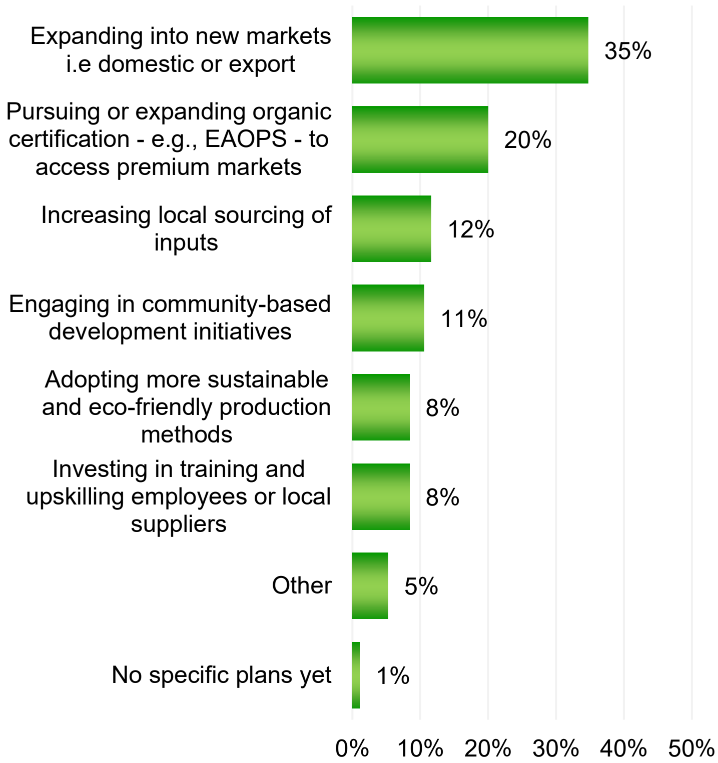

Figure 17: *Proportion of surveyed companies reporting future plans to enhance their economic contributions*

(iv) Sustainability and community engagement: Another 8% of surveyed companies cited plans to adopt more sustainable, eco-friendly production methods, while 11% planned to participate in community-based development initiatives. This idea was more pronounced in Kenya (19%) than in Uganda (3%) and Tanzania (8%).

(v) The above plans align with previous study findings. As earlier noted by key informants and companies, plans such as market expansion and certification will be key in attracting opportunities in premium markets, thereby enhancing both the economy and the companies' revenue streams. On the other hand, planned strategies such as local sourcing, workforce training, and community engagement appeal bring about economic development back home.

3.5 Objective 4: Identify the export readiness of the companies – does the company have sufficient production capacity that can be committed to the export market?

Introduction

The study aimed to establish the capacity of the companies in the organic sector to meet the demands of regional and international organic markets. Specifically, the study sought to determine whether these companies have the necessary production capacity, certifications, and infrastructure to successfully scale their operations for export.

The study employed an export readiness assessment framework focusing on key areas, including production capacity, certification with standards, quality control mechanisms, and logistics infrastructure. Special attention was given to critical infrastructure elements like cold storage facilities and efficient supply chains, which are essential for maintaining product quality during export processes.

The study's criteria for assessing export readiness of the sampled companies included gauging their ability to scale production, any existing export contracts and their compliance with international quality standards.

Summary of findings

a) **Annual production and growth drivers:** Most companies remain small to medium in scale: 37% produce under 10MT annually, 35% fall in the 10–50MT bracket, 17% operate at 51–100MT, and only 12% exceed 100MT. Kenyan firms skew smaller (41% at 10–50MT, just 3% over 100MT), while Uganda (18% over 100MT) and Tanzania (16%) have notably larger shares of high-volume producers. Production capacity also rises with age: firms older than ten years are four times more likely (24%) to exceed 100MT than those under five years (6%).

b) **Ability to scale for export:** Only 15% of firms can boost output by >50% with existing resources; 34% can grow by 26–50%; 35% by up to 25%; and 17% need major investment to scale at all. Tanzanian and Ugandan companies are the most flexible (18%-20% can expand >50%), whereas Kenyan firms face the greatest constraints (22% cannot scale without heavy investment). Mid-career firms (6–10 years) show the greatest ramp-up potential, with 41% able to increase by 26–50% and only 7% fully constrained.

c) **Readiness for export certification:** Three-quarters of companies (73%) plan to apply for EAOPS or other organic certifications within 12 months; 15% are already in process, 3% fully certified, and 9% unprepared to invest. Uganda leads in intent (85%), closely followed by Tanzania (80%), with Kenya lagging behind (57%). Mid-career and older firms demonstrate higher mid-certification activity (up to 29%), suggesting experience and resources ease the certification pathway.

d) **Consistency of product supply:** Only 19% of firms achieve truly year-round output; 32% are mostly consistent with occasional dips, 32% operate seasonally, and 18% are highly seasonal. Tanzania reports the highest reliability (24% year-round), Kenya the lowest (16%), with Uganda at 18%. Firms able to scale by >50% also tend to report mostly year-round supply, indicating operational agility underpins both consistency and scalability.

e) **Compliance with international quality standards:** Across the sample, 29% have no measures beyond domestic rules, 53% are partially compliant or working toward full alignment, 15% fully comply with global standards, and 3% exceed them. Kenya shows the strongest full-compliance share (22%), Uganda leads in partial compliance (67%), and Tanzania has the largest non-compliant segment (40%). Older firms more likely achieve full compliance (29% of firms over 10 years vs. 10% of startups).

f) **Cold storage & post-harvest handling:** A majority (57%) lack any cold-chain infrastructure; 32% have limited small-batch capacity; 9% meet basic export requirements; and only 2% operate advanced systems. Tanzania faces the steepest shortfall (68% without cold storage), followed by Kenya (57%) and Uganda (48%). Even among firms over ten years old, just 8% possess adequate or advanced facilities.

g) **Access to transport & logistics:** Logistics reliability varies widely: 24% suffer long, unpredictable delays; 42% see moderate lead-times; 27% enjoy generally reliable chains; and only 6% benefit from highly efficient logistics. Tanzanian companies fare best (40% reliable logistics), Kenyan firms worst (30% face extended delays), with Ugandans facing moderate delays (41%). Established companies report higher logistics efficiency (18% of those older than 10 years compared to 2% younger firms aged 1-5 years).

h) **Willingness to invest in export-grade infrastructure:** Seventy-one percent of firms would invest in export-grade upgrades if external support is available; 25% can self-fund minor improvements; and 2% are already planning major investments. Conditional willingness is highest in Kenya (73%) and Uganda (70%), slightly lower in Tanzania (68%). Mid-career and startup firms show the greatest appetite for conditional upgrades, highlighting potential impact from concessional financing.

i) **Existing export commitments:** Only 14% of companies hold binding export contracts; 26% have letters of intent; 32% rely on informal or verbal commitments; and 28% have no agreements. Kenya has the highest "no-agreement" share (38%), while Tanzania shows the strongest contract rate (20%), with Uganda and Kenya recording 15% and 8% respectively. Firms over ten years old convert buyer interest into formal contracts at six times the rate of startups.

j) **Short-term export readiness goals:** Nearly half (46%) plan to secure certifications and upgrade facilities; 33% intend to conduct market research; 14% aim to scale production and finalize long-term contracts; 6% have no plans; and 1% already meet their goals. Uganda (55%) and Tanzania (52%) prioritize certification/upgrades, whereas Kenya balances market exploration (46%) with infrastructure improvements (35%).

k) **Support needs for export-ready organic trade:** Almost all firms require external assistance: 92% seek financing for infrastructure; 79% want certification/compliance training; 73% need market research and buyer linkage services; 69% request quality-control and post-harvest support; and 58% look for logistics optimization. Tanzania (100%) and Uganda/Kenya (89%) show greatest demand for funding; Uganda and Tanzania both at (88%) also lead in certification-training needs, with Kenya showing slightly lower demand (65%).

3.5.1 Annual production and growth drivers

According to study data, the 95 surveyed companies exhibited a predominance of small to medium-scale production. Overall, 37% reported annual volumes under 10 Metric Tonnes

(MT), 35% fell in the 10–50 MT range, 17% operated at 51–100 MT, and 12% produced over 100 MT of their main product.

At the country level (**Table 25**), Kenya (n=37) had approximately 38% of surveyed companies producing under 10 MT, 41% reaching 10–50 MT, 19% reporting 51–100 MT, and just 3% exceeding 100 MT. In Uganda (n=33), approximately 36% fell under 10 MT, 30% operated at 10–50 MT, 15% reported 51–100 MT, and a notable 18% exceeded 100 MT. A similar trend was evident in Tanzania (n=25), where 36% recorded production under 10 MT, 32% produced 10–50 MT, 16% fell within the 51–100 MT bracket, and 16% exceeded 100 MT.

Table 25: *Country analysis of the proportion of surveyed companies reporting their company's approximate annual production volume for its main product*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
d1. What is your company's approximate annual production volume for its main product?	Less than 10 metric tons	38%	36%	36%	**37%**
	10–50 metric tons	41%	30%	32%	**35%**
	51–100 metric tons	19%	15%	16%	**17%**
	Over 100 metric tons	3%	18%	16%	**12%**
	Total	**100%**	**100%**	**100%**	**100%**

Additionally, analysis by business age (**Table 26**) reveals that companies operating for one to five years (n=48) tend to be smaller: 40% produce under 10 MT, 44% reach 10–50 MT, 10% manage 51–100 MT, and just 6% exceed 100 MT. Those in the six to ten-year bracket (n=29) showed more balance: 31% remained under 10 MT, 28% fell into each of the 10–50 MT and 51–100 MT ranges, and 14% surpassed 100 MT. Among companies older than ten years (n=17), 35% still produced under 10 metric tons (MT), 24% reported production between 10 and 50 MT, 18% achieved output between 51 and 100 MT, and 24% exceeded 100 MT. Thus, there is evidence that production volumes increase with firm maturity: the share of companies producing over 100 metric tons rose from 6% among the youngest firms to 24% among the oldest.

Table 26: *Business age analysis of the proportion of surveyed companies reporting their company's approximate annual production volume for its main product*

Question	Category	a4. How long has your business been operating?			Total (n=95)
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)	
d1. What is your company's approximate annual production volume for its main product?	Less than 10 metric tons	40%	31%	35%	**37%**
	10–50 metric tons	44%	28%	24%	**35%**
	51–100 metric tons	10%	28%	18%	**17%**
	Over 100 metric tons	6%	14%	24%	**12%**
	Total	**100%**	**100%**	**100%**	**100%**

A KOAN official in Kenya confirmed these trends, noting that *"volumes are increasing though difficult to give exact figures, especially for export markets. For the domestic market, the volume is half-a-billion [KES] annual turnover, with 60 farmers certified for export and 10,000* *for local markets."* This observation aligned with the survey's finding that only a small minority currently produce at export-scale volumes (>100 MT).

> *"Volumes are increasing though difficult to give exact figures especially for the export market, for domestic market the volumes is ½ billion annual turnover. About 60 farmers are certified organic for export market and 10,000 farmers for local market"*

Official, Kenya Organic Agriculture Network (KOAN)

The KOAN official's remarks highlighted a dual reality in Kenya's organic sector. While annual domestic turnover reached a substantial half a billion Kenyan shillings, primarily driven by 10,000 smallholders, the export segment remained largely unexploited, with only 60 farmers supplying international markets. This observation mirrored survey findings, showing that just 12% of companies produced over 100 metric tons, an export-scale volume, highlighting how the bulk of surveyed firms operated at scales tailored to domestic demand.

Revenue patterns further illustrated this split: organic exports contributed a mere 2% of total turnover compared to 20% from local organic sales. Despite these modest export revenues, the informant emphasized year-on-year growth, underpinned by a rapidly expanding certified land base (173,120 ha) and a growing farmer cohort (6,320 certified). These figures suggested that while export readiness was confined to relatively few large producers, broader participation in certification laid a foundation for future scale-up. Thus, as more farmers entered the organic fold, the pipeline for mid-sized aggregators and processors strengthened, setting the stage for incremental export growth.

> *"Current proportion is organic 2%, convectional 98%. Local market organic 20%, convection 80%. There is annual growth in organic. By end of 2024 total land under organic was 17,3120ha of land and 6,320 farmers certified organic"*

Official, Kenya Organic Agriculture Network (KOAN)

Similarly, a TOAM official in Tanzania observed, *"There is an increase in production volume and sales/revenue of organic products due to rising market demand both regionally and internationally."* This perspective that production volumes and revenues rose in response to regional and international demand corroborated this trajectory. Longer-established firms with the highest shares of large-volume outputs capitalized on these market opportunities, leveraging their infrastructure and networks. On the other hand, the ability of younger companies to bridge the gap from local to export scales is dependent on supportive policies, training and financing.

The challenge and opportunity, therefore, rests in converting rising certification and land under production into broader export capacity, ensuring that increasing volumes among 6,320 certified farmers translate into a diversified revenue and deeper regional and global market penetration.

When asked how easily their respective companies can increase production volume to supply export markets (**Figure 18**), the surveyed companies varied in their ability to ramp up output without heavy new investment, reflecting both infrastructure gaps and operational flexibility. Overall, 17% reported they could not increase production without significant investment or restructuring, 35% could boost output by up to 25% with some adjustments, 34% could grow by 26–50% with moderate changes, and 15% could expand by more than 50% using existing resources and minimal tweaks.

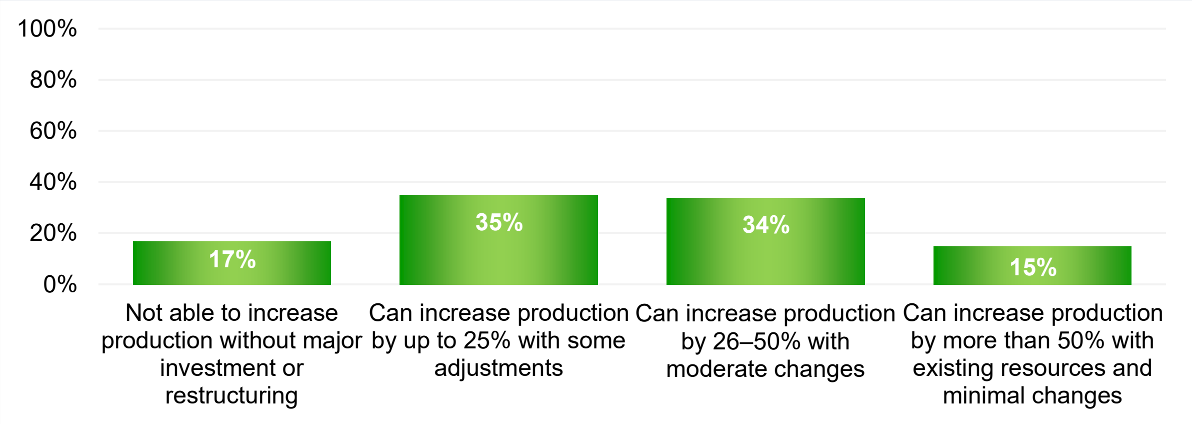

Figure 18: *Proportion of surveyed companies reporting how easily they can increase their production volume to supply export markets*

The country-level analysis (**Table 27**) reveals that 22% of respondents in Kenya (n=37) could not scale without significant investment, 38% could increase by up to 25%, 32% could add 26–50%, and 8% could expand by more than 50%. In Uganda (n=33), approximately two out of every ten firms (21%) faced significant constraints: 27% could grow by up to 25%, 33% could increase capacity by 26–50%, and 18% could exceed a 50% expansion with minimal changes. In Tanzania (n=25), only 4% required significant investment to scale, while 40% could increase by up to 25%, approximately 36% could grow by 26–50%, and 20% could expand by more than 50%.

This pattern suggests that Tanzanian companies, likely those with a slightly higher share of advanced infrastructure, enjoyed the greatest flexibility. In contrast, Kenyan firms experienced the largest share of scale-up constraints.

Table 27: *Country-level analysis of the proportion of surveyed companies reporting how easily they could increase their production volumes to supply export markets*

Question	Category	s3. Country of operation.		
		Kenya (n=37)	**Uganda (n=33)**	**Tanzania (n=25)**
d2. How easily can your company increase its production volume to supply export markets?	Not able to increase production without major investment or restructuring	22%	21%	4%
	Can increase production by up to 25% with some adjustments	38%	27%	40%
	Can increase production by 26–50% with moderate changes	32%	33%	36%
	Can increase production by more than 50% with existing resources and minimal changes	8%	18%	20%
	Total	**100%**	**100%**	**100%**

Analysis by the age of surveyed companies (**Table 28**) revealed that approximately a quarter (25%) of surveyed firms aged 1–5 years (n=48) could not scale without significant investment, 33% could add up to 25%, 29% could grow by 26–50%, and 13% could expand by over 50%. Among firms aged 6–10 years (n=29), only 7% required significant investment, 38% could increase output by up to 25%, 41% could expand by 26–50%, and 14% could exceed 50% growth. In the over 10 years (n=17) category, 12% faced heavy constraints, 29% could grow by up to 25%, 35% could scale by 26–50%, and a robust 24% could expand by more than 50% using current resources.

These results suggest that firms aged 6–10 years are better positioned to scale due to a more immediate need for better infrastructure to meet their expanding markets. In contrast, the youngest and oldest companies showed varying levels of flexibility depending on their current investment status.

Table 28: *Business age analysis of the proportion of surveyed companies reporting how easily they could increase their production volumes to supply export markets*

Question	Category	a4. How long has your business been operating?		
		1–5 years (n=48)	**6–10 years (n=29)**	**10 years+ (n=17)**
d2. How easily can your company increase its production volume to supply export markets?	Not able to increase production without major investment or restructuring	25%	7%	12%
	Can increase production by up to 25% with some adjustments	33%	38%	29%
	Can increase production by 26–50% with moderate changes	29%	41%	35%
	Can increase production by more than 50% with existing resources and minimal changes	13%	14%	24%
	Total	**100%**	**100%**	**100%**

The above reported capacities to scale-up align with the earlier analysis of production volumes and infrastructure readiness. Key informants noted that even companies with moderate mechanization required improvements in storage, processing lines and traceability to meet export demands. The relatively low proportion of surveyed firms (15%) that reported that they could boost their respective outputs by over 50% highlights a need for targeted investments, such as in training, equipment or processes, to unlock larger-scale organic exports. Thus, this project should target companies in the early-growth (1-5 years) and mid-career (6-10 years) stages by leveraging their hunger to grow and their existing operational strengths to enhance their access to premium markets.

3.5.2 Certification uptake amongst companies

Study findings (**Figure 19**) show that certification uptake among the 95 surveyed companies remains uneven. Overall, 59% of respondents held no formal certifications, while the remaining 41% managed one or more schemes, ranging from Good Agricultural Practices (GAP) to multiple organic standards. Overall, 7% reported holding EAOPS at the time of the survey, USDA Organic-NOP (7%), HACCP ISO 22000 (8%), GAP (12%) and others such as JAS, CERES etc. (21%).

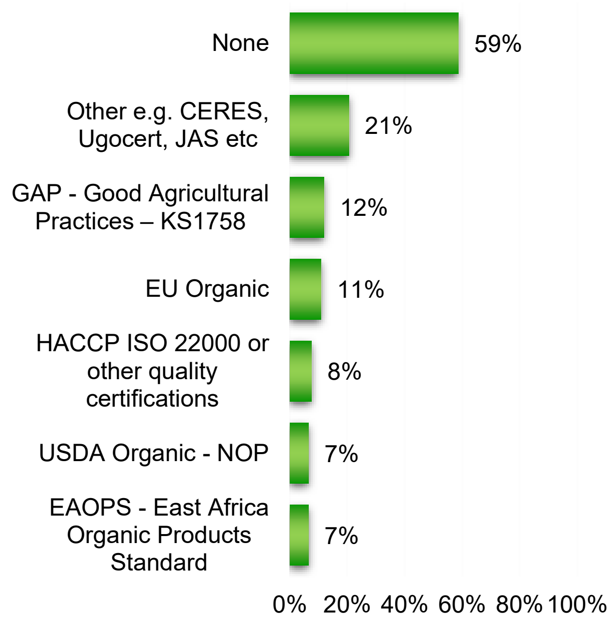

Figure 19: *Proportion of surveyed companies reporting the certifications they currently hold*

Further analysis of study data shows that production focus influenced certification. Among exclusively organic producers (n=70), 39% held at least one certification, with EAOPS (9%), EU Organic (11%), and GAP (7%) being the most common. Conventional-only firms (n=3) reported no organic certifications, while hybrid operators (n=22) reported the highest certification rates overall, with 33% holding GAP and 33% held EAOPS or other certifications, thus highlighting their need to satisfy both domestic and export buyers.

Country patterns (**Table 29**) revealed that Uganda had the highest share of uncertified firms (70%), followed by Kenya (54%) and Tanzania (52%). Among those holding certifications, Kenya led in EU Organic (18%) and USDA Organic–NOP (12%), reflecting its export orientation toward Europe and the U.S. Tanzanian companies showed relatively stronger uptake of the East Africa Organic Products Standard (EAOPS) at 16%, consistent with their deeper engagement in regional trade networks.

Table 29: *Country analysis of the proportion of surveyed companies indicating the certifications they hold*

Question	Certification	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
a11.Which certifications do you currently hold? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY):	None	54%	72%	48%	**59%**
	GAP - Good Agricultural Practices – KS1758	20%	9%	4%	**12%**
	EAOPS - East Africa Organic Products Standard	6%	0%	16%	**7%**
	EU Organic	9%	19%	4%	**11%**
	USDA Organic - NOP	6%	13%	0%	**7%**
	HACCP ISO 22000 or other quality certifications	11%	9%	0%	**8%**
	Others	20%	13%	32%	**21%**
	Total	**100%**	**100%**	**100%**	**100%**

Furthermore, firm maturity shaped certification depth (**Table 30**). Startups (<1 year, n=1) held no certifications. In the 1–5-year cohort (n=48), 41% remained uncertified, 23% held GAP, and 8–10% held EAOPS or EU Organic. Mid-career firms (6–10 years, n=29) showed a higher uptake: 45% had no certification, but 14% carried GAP, 10% EAOPS, and 10% EU Organic. The oldest companies (>10 years, n=17) exhibited depth and diversity: 35% were uncertified, while significant proportions of surveyed companies held GAP (24%), EAOPS (24%), EU Organic (29%), and other premium labels such as CERES, Ugocert, JAS etc. (12%).

Table 30: *Business-age analysis of the proportion of surveyed companies indicating the certifications they hold*

Question	Certification	s3. Country of operation.			Total (n=95)
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)	
a11.Which certifications do you currently hold? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY):	None	75%	45%	35%	**59%**
	GAP - Good Agricultural Practices – KS1758	6%	14%	24%	**12%**
	EAOPS - East Africa Organic Products Standard	8%	10%	24%	**6%**
	EU Organic	4%	10%	29%	**11%**
	USDA Organic - NOP	0%	10%	18%	**6%**
	HACCP ISO 22000 or other quality certifications	4%	3%	24%	**7%**
	Others	15%	34%	12%	**20%**
	Total	**100%**	**100%**	**100%**	**100%**

3.5.3 Readiness for export certification

Surveyed companies varied significantly in their readiness to pursue or upgrade certifications for export markets (**Figure 20**). Overall, the study findings indicate that approximately 73% of the 95 respondents reported considering applying for EAOPS or other organic certifications within the next 12 months, 15% were in the process of obtaining new or updated certifications, and only 3% were fully certified and current with all necessary export credentials. However, 9% of the surveyed companies reported that they were not prepared to invest in certification at this time.

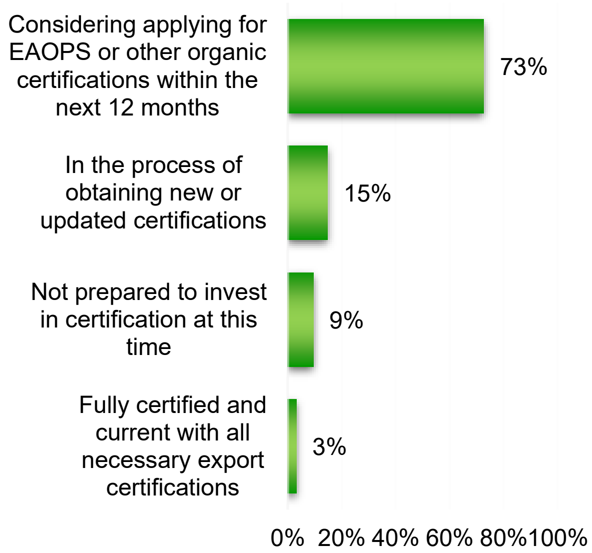

Figure 20: *Proportion of surveyed companies reporting their readiness to obtain or upgrade certifications for export markets*

In Kenya (n=37), 57% planned to apply soon, 16% were in mid-certification status, 5% held up-to-date credentials, and 22% lacked readiness to invest. Meanwhile, in Uganda (n=33), 85% anticipated applying for certification, 12% were actively updating their certifications, 3% were fully certified, and notably, none reported being unprepared. Similarly, in Tanzania (n=25), 80% intended to pursue certifications, 16% were in the process, and none were fully certified, while 4% had no plans to invest. (**Table 31**)

Table 31: *Country analysis of the proportion of surveyed companies reporting their readiness to obtain or upgrade certifications for export markets*

Question	Category	s3. Country of operation		
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)
d2. How easily can your company increase its production volume to supply export markets?	Not prepared to invest in certification at this time	22%	0%	4%
	Considering applying for EAOPS or other organic certifications within the next 12 months	57%	85%	80%
	In the process of obtaining new or updated certifications	16%	12%	16%
	Fully certified and current with all necessary export certifications	5%	3%	0%
	Total	**100%**	**100%**	**100%**

A look at the relationship between the age of a business and certification readiness (**Table 32**) reveals that longer-established firms demonstrate higher mid-certification activity (29% vs. 10% among the youngest), suggesting that experience and resources facilitate the certification process. Among firms aged 1–5 years (n=48), nearly eight out of every ten (77%) considered applying, 10% were mid-stream in their application process, 2% were fully current, and 10% were unprepared to apply. Amongst the 6–10 years (n=29) category, 72% planned to use, 14% were updating, 3% were fully certified, and 10% lacked readiness. In the older age category (Over 10 years (n=17)), nearly six out of every ten (59%) surveyed firms intended to apply for new certifications, 29% were in the process of obtaining them, 6% were fully certified, and only 6% were unprepared.

Table 32: *Business age analysis of the proportion of surveyed companies reporting their readiness to obtain or upgrade certifications for export markets*

Question	Category	a4. How long has your business been operating?		
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)
d4. Which statement best describes your company's readiness to obtain or upgrade certifications for export markets? (ONE ANSWER ONLY)	Not prepared to invest in certification at this time	10%	10%	6%
	Considering applying for EAOPS or other organic certifications within the next 12 months	77%	72%	59%
	In the process of obtaining new or updated certifications	10%	14%	29%
	Fully certified and current with all necessary export certifications	2%	3%	6%
	Total	**100%**	**100%**	**100%**

Data from key informants provide a picture of the certification landscape, revealing both the drivers and the pain points that slow progress. Firstly, the prioritization of multiple standards, as reported by the interviewed NOAM officials (i.e., EU, USDA NOP, EAOPS, JAS, and Bio Suisse), illustrates how companies tailor their certification strategies to meet the demands of premium markets. Because Europe and the United States absorb the lion's share of East African organic exports, firms feel compelled to secure the corresponding badges, even if that means shouldering extra audits, paperwork and fees. This layered approach increases both complexity and cost, thus contributing to the reasons why 9% of surveyed companies remained unprepared to invest at all.

> *"In order of priority is EU, NOP (USAD Organic), EOAPS JAS and Biosuisse organic because most of organic produce are exported to Europe, followed by USA. Every country only accepts products certified using their standards"*

Oficial, Kenya Organic Agriculture Network (KOAN)

Second, key informants interviewed stated that the annual certification renewal results in recurring expenses and administrative work for companies in the organic sector. They indicated that lapses often stem from cash-flow shortfalls or simple miscommunication, such as changes in ownership or management or insufficient information for renewal. These lapses may have contributed to the survey finding that only a small minority held valid export certifications at the time of the study.

> *"For the first certification after 2 years but after the first certification every year. Yes, there are relapses may be due to financial constraints, noncompliance with organic standards, insufficient information for renewal, change of plan, ownership or management"*

Official, Kenya Organic Agriculture Network (KOAN)

Third, certification bodies act as strategic advisors, guiding firms in choosing the proper standard based on market targets, timelines, and budget constraints. As noted by the key informants interviewed, larger, more established companies have the capacity to absorb the certification costs. In contrast, small to mid-sized companies' fallback position is to seek donor grants or government support. These findings highlight the importance of financial mechanisms in any certification program.

> *"Yes, companies are willing to pay for certification, some are very able to pay while others struggle hence seek grants from donors, government and other well-wishers"*

Official, Kenya Organic Agriculture Network (KOAN)

Fourth, the interviewed NOAMs indicated that compliance is more than a certificate on the wall. Specifically, certification is dependent on robust record-keeping, clear traceability systems and internal mechanisms to identify and correct noncompliance. They noted that the operational answers extend beyond mere paperwork and rely on the infrastructure and workforce training deficits identified in the previous sections of this report.

> *"Areas that are most critical for achieving compliance are proper understanding of the organic standards to be certified against, keeping detailed records, selection of appropriate organic certification body, production of quality and export-quantity produce, and maintain important certification requirements such as technical staff and infrastructure such as production and processing facilities"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Finally, informants emphasized that once firms navigate the certification environment, they unlock premium markets and consumer trust, particularly among health and environmentally conscious buyers who are willing to pay more for certified goods.

> *"Companies can capitalize on building consumers trust on heathy food and environmental protection because of consumers' willingness to pay premium prices for sustainable organic products"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Thus, the above qualitative perspectives show that strong export intentions (73% planning certification) and active mid-certification efforts (15%) operate in an environment of financial pressures and operational gaps. Thus, targeted financial support, technical assistance with compliance systems, and access to market intelligence will be key in this project to adequately support companies in enhancing their access to regional and international markets.

3.5.4 Consistency of product supply

As previously noted in earlier sections of this report, a consistent supply is essential for meeting export-scale volumes (exceeding 100 MT). Study findings (**Table 33**) show that consistent year-round supply remained a challenge for many surveyed companies, with only 19% of the 95 respondents reporting truly uninterrupted output throughout the year. A further 32% described their supply as mostly year-round, with occasional fluctuations; 32% labelled it moderately seasonal (available only part of the year); and 18% admitted it was highly seasonal, confined to peak harvest windows. Thus, with only 12% of firms currently producing at least 100 metric tonnes, the 19% that achieve year-round consistency show that only a small subset of exporters can reliably service international buyers throughout the calendar year.

Table 33: *Business age analysis of the proportion of surveyed companies reporting their readiness to obtain or upgrade certifications for export markets*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
d3. How would you describe the consistency of your product supply throughout the year?	Highly seasonal i.e. limited availability outside peak season	24%	18%	8%	**18%**
	Moderately seasonal i.e. availability for part of the year only	32%	33%	28%	**32%**
	Mostly year-round availability with occasional fluctuations	27%	30%	40%	**32%**
	Year-round consistent supply	16%	18%	24%	**19%**
	Total	**100%**	**100%**	**100%**	**100%**

Country-level data show that 16% of surveyed firms in Kenya (n=37) had consistent year-round supply, while in Uganda (n=33) and Tanzania (n=25), 18% and 24%, respectively, reported year-round reliability.

Contextually, surveyed firms that could expand production by more than 50% with minimal changes (15%) were aligned with those reporting mostly year-round availability, suggesting that operational flexibility and product supply go hand in hand. Additionally, export-focused certification standards often require proof of uninterrupted supply to secure contracts with buyers. The 73% of respondents considering certification must, therefore, address evident seasonal gaps, especially the 32% who reported facing moderate seasonality. The project could support these firms by investing in cold storage, staggered planting, or processing reserves to align with the stringent traceability and supply continuity requirements highlighted by key informants.

3.5.5 Compliance with international quality standards

Study results (**Figure 21**) reveal varied levels of alignment with global quality benchmarks among surveyed companies. As a key indicator of export readiness, the study investigated the level of compliance with international quality standards among targeted companies. Across all 95 respondents, 29% had no compliance measures beyond basic domestic regulations, 53% were partially compliant or actively working toward complete alignment, 15% were fully compliant with internationally recognized standards, and only 3% exceeded basic requirements through ongoing quality improvement initiatives.

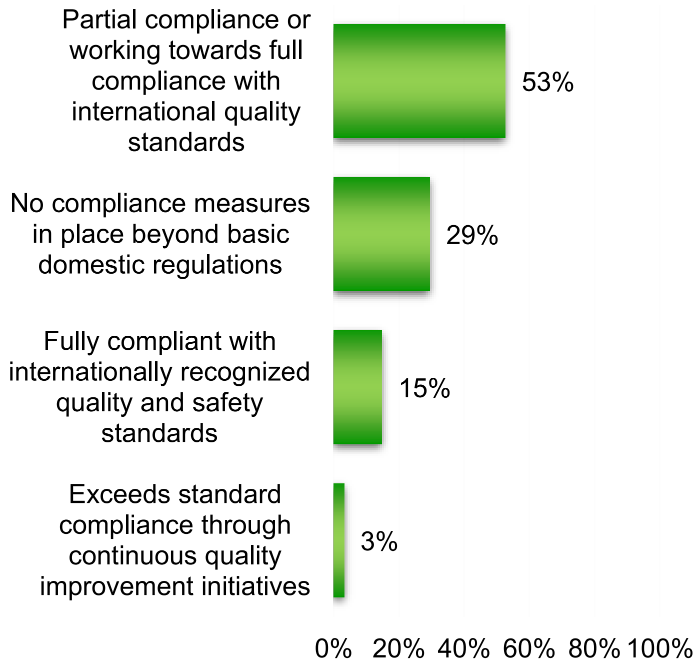

__Figure 21:__ Proportion of surveyed companies reporting their current compliance with international quality standards

Breakdowns by country (**Table 34**) show that 32% of surveyed companies in Kenya (n=37) lacked any international compliance framework, 43% were partially compliant, 22% achieved full compliance, and 3% exceeded the standard. In Uganda (n=33), approximately two out of every three companies reported working towards compliance (67%), 9% were fully compliant, 6% exceeded, and just 18% had no measures in place. In Tanzania (n=25), four out of every ten surveyed companies (40%) remained unprepared, 48% were partially compliant, 12% met all standards, and none exceeded them.

__Table 34:__ Country analysis of the proportion of surveyed companies reporting their current compliance with international quality standards

Question	Category	s3. Country of operation.		
		Kenya (n=37)	**Uganda (n=33)**	**Tanzania (n=25)**
d5. Which of the following best describes your company's current compliance with international quality standards?	No compliance measures in place beyond basic domestic regulations	32%	18%	40%
	Partial compliance or working towards full compliance with international quality standards	43%	67%	48%
	Fully compliant with internationally recognized quality and safety standards	22%	9%	12%
	Exceeds standard compliance through continuous quality improvement initiatives	3%	6%	0%
	Total	100%	100%	100%

A comparison of the age of firm vis-à-vis compliance (**Table 35**) reveals that longer-established firms demonstrate stronger compliance, reflecting their greater resources and experience in navigating certification regimes. Specifically, younger firms (1–5 years (n=48)) struggled, with 40% having no measures, 50% partially compliant, 10% fully compliant, and none exceeding standards. Mid-career companies (6–10 years (n=29)) showed progress, with 17% unprepared, 66% partially compliant, 14% fully compliant, and 3% exceeding compliance. Meanwhile, only 18% of companies with over 10 years of experience (n=17) were unprepared, 41% were partially compliant, 29% were fully compliant, and 12% exceeded standards.

***Table 35:** Business age analysis of the proportion of surveyed companies reporting their current compliance with international quality standards*

Question	Category	a4. How long has your business been operating?		
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)
d5. Which of the following best describes your company's current compliance with international quality standards?	No compliance measures in place beyond basic domestic regulations	40%	17%	18%
	Partial compliance or working towards full compliance with international quality standards	50%	66%	41%
	Fully compliant with internationally recognized quality and safety standards	10%	14%	29%
	Exceeds standard compliance through continuous quality improvement initiatives	0%	3%	12%
	Total	100%	100%	100%

Although 68% of respondents reported at least partial alignment with international quality standards, the path to full certification depended on a sequence of interrelated steps as enumerated by the key informants interviewed.

a. **Strategic standards selection:** According to the key informants, companies require expert guidance to match their target export markets, whether the EU, USA or regional trade blocs, with the appropriate combination of EAOPS, USDA NOP or Bio Suisse standards. This tailored approach helps prevent wasted resources on low-priority certifications and concentrate efforts where return on investment is highest.

> *"Areas most critical for achieving compliance are proper understanding of the organic standards to be certified against to manage resources responsibly, keeping detailed records, selection of appropriate organic certification body, having a mechanism in place to address any noncompliance and maintain certification requirements"*

Official, Certification body, Kenya

b. **Foundational compliance factors:** Key informants also cited the importance of robust record-keeping and noncompliance management systems. They indicated that a clear grasp of standard requirements, together with detailed documentation and a plan to remedy any shortfalls, formed the foundation of sustainable certification, yet only 15% of firms reported full compliance. In addition, study data shows that key informants prioritize audits of physical infrastructure, such as storage, packaging lines, calibrated scales and waste-management facilities because these elements reinforce traceability efforts. With

29% of companies lacking any compliance measures, this brings into question the need for major capital investment.

> *"Improvements most urgent for sustaining organic compliance and growth are like records documentation, traceability, packaging and storage, management buffer zones to control chemical drifts and sustainable certification. Also company physical facilities like stores, toilets, waste disposal and Operation System Plan (OSP) manual are key to compliance"*

Official, Certification body, Kenya

c. **Workforce training and capacity building:** According to the key informants interviewed, companies struggle with staff capacity to maintain compliance. Specifically, they indicated that inadequate organic-specific knowledge among staff made internal audits and adherence to standards processes difficult. Informants recommended modular training on standards interpretation, record-keeping protocols, internal audit techniques, tailored to each firm's existing capabilities, and available financial resources.

> *"Companies often struggle the most with financial resources, as the costs of certification, organic inputs, and infrastructure upgrades can be prohibitive. Technical know-how is another key challenge, with limited access to training on organic standards and compliance requirements, while supply chain management issues, such as inconsistent quality and inadequate logistics, further hinder their competitiveness"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Thus, as earlier noted, a high proportion of companies reported partial compliance (68%) and an equally considerable proportion of respondents (29%) indicated no measures towards compliance. Thus, to convert intent into full compliance, the project should consider targeted financial support, such as subsidized certification fees, audits, and essential infrastructure upgrades (e.g., traceability systems and cold storage facilities), strengthen advisory services informed by needs assessments and customized training in record-keeping, internal audits and quality-assurance systems, and simplify certification pathways to help companies prioritize and sequence multiple standards to manage complexity and reduce costs, e.g. EAOPS alongside EU and USDA NOP.

3.5.6 Cold storage and post-harvest handling capacity

Study findings (**Table 36**) show that the majority of surveyed companies lacked sufficient cold chain infrastructure to support consistent, high-quality organic exports. Overall, 57% of the 95 respondents reported having no cold storage or specialized handling facilities, 32% maintained limited capacity for small batches, 9% possessed adequate basic export-grade facilities, and only 2% operated advanced cold chains capable of handling large volumes to strict standards.

***Table 36:** Country-level analysis of the proportion of surveyed companies describing their cold storage and post-harvest handling infrastructure*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
d7. How would you describe your company's	No cold storage or specialized handling facilities	57%	48%	68%	**57%**
	Limited cold storage capacity, suitable for small batches	24%	42%	28%	**32%**

cold storage and post-harvest handling infrastructure?	Adequate cold storage and handling facilities meeting basic export requirements	14%	9%	4%	**9%**
	Advanced cold chain infrastructure capable of handling large volumes consistently & strict quality standards	5%	0%	0%	**2%**
	Total	**100%**	**100%**	**100%**	**100%**

In Kenya, over half of companies (57%) lacked cold storage, 24% maintained limited batch capacity, 14% met basic export standards, and 5% operated advanced systems. Ugandan firms showed similar gaps: 48% had no facilities, 42% ran small-batch storage, and 9% met basic requirements, while none had advanced infrastructure. In Tanzania, 68% lacked cold chains, 28% had limited capacity, and only 4% met basic export standards, with no advanced systems reported.

Startups (1–5 years) uniformly lacked cold storage, while mid-career companies (6–10 years) still faced deficits, with 63% lacking facilities and 31% limited to small batches. However, a few (4%) met basic standards, and 2% operated advanced systems. Among the oldest firms (over 10 years), 59% remained without cold chains, 29% had limited capacity, and modest shares (6% each) met basic export requirements or operated advanced systems. Further analysis by firm age is shown in **table 37**.

Table 37: *Business age analysis of the proportion of surveyed companies describing their cold storage and post-harvest handling infrastructure*

Question	Category	a4. How long has your business been operating?			Total (n=95)
		1–5 years (n=48)	6–10 years (n=29)	10 years+ (n=17)	
d7. How would you describe your company's cold storage and post-harvest handling infrastructure?	No cold storage or specialized handling facilities	63%	45%	59%	**57%**
	Limited cold storage capacity, suitable for small batches	31%	34%	29%	**32%**
	Adequate cold storage and handling facilities meeting basic export requirements	4%	21%	6%	**9%**
	Advanced cold chain infrastructure capable of handling large volumes consistently & strict quality standards	2%	0%	6%	**2%**
	Total	**100%**	**100%**	**100%**	**100%**

Key informants from Uganda corroborated the above survey findings, highlighting the infrastructure gaps. According to them, the Ugandan government and the EU are now addressing the widespread lack of cold storage, as reported by nearly half of the surveyed companies, by building a dedicated cold-chain corridor from farms to the airport. This initiative will ensure that fresh commodities remain at the proper temperature from the field to the freight.

> *"I think the challenges that happen in supply chain is majorly for products which require cold chain. So for those, we still have in Uganda a probably with having a robust cold chain system. I think now with support from the EU, the government has now, in collaboration with the government of Uganda, they're setting up a fully-fledged system, I think, along the road that connects the airport for some of these products which are exported fresh, that require to be maintained in storage in the cold chain. So, this facility will actually be able to facilitate people who are exporting some of these fresh commodities"*

Official, Government Ministry, Uganda

Key informants also highlighted the NOGAMU-led pineapple cooperative example illustrating how targeted partnerships and supply-chain audits can unlock prompt improvements. By linking producers to temperature-controlled logistics, they reduce losses, enhance traceability, and transition from small-batch to consistent export volumes. This model demonstrates that even 32% of firms with limited capacity can scale effectively when given the proper support.

> *"We as NOGAMU work closely with the member companies to assess their logistics framework from the firm level to actually processing and do the final transportation, which includes looking at your cold rooms, deal out the cold rooms. We also look at the transport systems. We also try to go ahead and map out bottlenecks along the value chain. For example, a member exporting organic pineapples. For example, we supported the supply chain audits that identified weakness in packaging and cold storage transportation. As a result, the farmer cooperative was linked with the logistic provider that offers temperature-controlled rooms, reducing the post harvest losses"*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

Key informants also reported the reliance on buckets and manual threshing as key processing facilities which limit both quality and scale. They indicated that these outdated practices erode shelf life, increase post-harvest losses, and undermine buyer confidence.

> *"The technologies we are using are largely rudimentary. So we cannot compete because of the production technologies. Because of the harvesting and post-harvesting handling technologies. People are using, I mean other farmers are using cold chains. And for us we are only using buckets to handle produce. To go and harvest. To process we are using our hands to thresh. To do what others are using just machines. Using machines. Using robots and we are still using our hands. So those are the weaknesses"*

Official, Government Ministry, Uganda

In Tanzania, informants cited high certification fees and weak market linkages as factors that worsen the issue of cold storage. However, they highlighted mobile certification tracking, solar drying and decentralized cold rooms as some of the technologies that can extend access to firms across the region.

> *"Technological advancements in mobile-based certification tracking, solar drying, and cold storage can enhance quality and shelf life, while partnerships with international organic certifiers and ethical buyers improve market access. With strategic investments in value addition, branding, and compliance with international standards, Tanzania's organic sector is well-positioned for expansion"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Taken together, and combined with certification guidance and workforce training, the above study data reveal a path for EAOPS rollout: building shared cold-chain hubs, funding mobile processing units, and brokering logistics partnerships.

3.5.7 Access to transport and logistics solutions

Study findings reveal that the reliability of transport and logistics varied considerably among surveyed companies, impacting their ability to meet domestic and export market deadlines. Overall, 24% of the 95 respondents reported long and unpredictable lead times with frequent delays, 42% experienced moderate lead times with occasional setbacks, 27% enjoyed generally reliable supply chains with predictable lead times, and only 6% benefited from highly efficient logistics with minimal delays.

At the country level (**Table 38**), study data shows that Tanzanian firms reported the best overall reliability in logistics. At the same time, Kenyan companies faced the greatest unpredictability, while Ugandan firms fell somewhere in between. In Kenya, 30% of companies experienced long, unpredictable delays, 41% faced moderate lead times, 22% maintained reliable logistics, and 8% operated highly efficient supply chains. In Uganda, 24% reported frequent delays, 45% experienced moderate lead times, and 24% enjoyed reliable service, while 6% achieved top-tier efficiency. Tanzania fared better, with only 16% suffering long delays, 40% operating under moderate lead times, another 40% benefiting from predictable supply chains, and 4% running highly efficient logistics.

Table 38: *Country-level analysis of the proportion of surveyed companies describing their access to efficient transport and logistics solutions?*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
d9. Which statement best describes your company's access to efficient transport and logistics solutions?	Long and unpredictable lead times with frequent delays	30%	24%	16%	**24%**
	Moderate lead times with occasional delays	41%	45%	40%	**42%**
	Generally reliable supply chain with predictable lead times	22%	24%	40%	**27%**
	Highly efficient and reliable supply chain with minimal delays	8%	6%	4%	**6%**
	Total	**100%**	**100%**	**100%**	**100%**

Analysis by the age of firms (**Table 39**) reveals that younger firms (1–5 years) struggle the most with logistics, with 31% facing extended delays, 50% reporting moderate lead times, 17% maintaining reliable service, and only 2% enjoying highly efficient logistics. Within mid-career companies (6–10 years), only 14% experienced long delays, 38% reported facing moderate delays, 41% operated reliably, and 7% achieved efficiency. The most established companies (those over 10 years old) led in performance, with 24% experiencing long delays, 24% having moderate lead times, 35% maintaining reliable supply chains, and 18% operating highly efficient logistics.

Table 39: *Business age analysis of the proportion of surveyed companies describing their access to efficient transport and logistics solutions?*

Question	Category	a4. How long has your business been operating?			Total (n=95)
		1–5 years	6–10 years	10 years+	

		(n=48)	(n=29)	(n=17)	
d9. Which statement best describes your company's access to efficient transport and logistics solutions?	Long and unpredictable lead times with frequent delays	31%	14%	24%	**24%**
	Moderate lead times with occasional delays	50%	38%	24%	**42%**
	Generally reliable supply chain with predictable lead times	17%	41%	35%	**27%**
	Highly efficient and reliable supply chain with minimal delays	2%	7%	18%	**6%**
	Total	**100%**	**100%**	**100%**	**100%**

According to Tanzania's officials, logistics bottlenecks, including poor roads and limited temperature-controlled facilities, explain why nearly one in six firms cannot reliably move perishable products to market. According to the key informants interviewed, inefficient customs clearance and weather disruptions further increase logistics challenges.

> *"Logistics challenges include poor road network, insufficient facilities for temperature-sensitive products, weather conditions and inefficient customs clearance process sometimes results in long waiting times at port/borders"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Furthermore, by auditing cold rooms, mapping transport routes, and coordinating logistics providers through NOGAMU, key informants interviewed in Uganda indicated that these interventions would be crucial in addressing existing logistical challenges.

> *"So, just to answer that briefly, as NOGAMU, we evaluate and support this logistics and supply chain capabilities of our member companies through capacity building, stakeholder coordination and technical support. So, this is done to ensure that the organic products are exported efficiently, sustainably and in line with market requirements. So, for example, when you look at the supply chain assessments, we as NOGAMU work closely with the member companies to assess their logistics framework from the firm level to actually processing and do the final transportation, which includes looking at your cold rooms, deal out the cold rooms"*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

Key informants interviewed in Kenya also cited KEBS training programs in handling, cold-chain management, packaging, and documentation as contributing to the improvement of logistics reliability. According to them, the program's emphasis on hygiene and labelling helps firms reduce delays and meet both domestic and export market requirements.

> *"KEBS assesses transportation and storage facilities (especially for perishable or certified goods) to ensure hygiene compliance, proper labeling, and cold chain integrity where necessary. KEBS through its quality assurance and the national quality institute provides technical assistance and training on: Product handling and storage, Cold chain logistics, packaging standards, labeling and transport documentation"*

KII, State Department official, Kenya

Based on the above study data, there is a need to pair infrastructure investments, such as road networks, farm-to-airport cold corridors and customs reforms, with expanded technical assistance and training to equip companies to overcome logistical hurdles and deliver certified organic products on time.

3.5.8 Willingness to invest in export-grade infrastructure

Study data from both surveyed companies and key informants interviewed shows that companies are willing to invest in production and processing infrastructure but face financial constraints. When asked if they would be willing to invest in upgrading their infrastructure to meet export requirements, a majority of surveyed companies (71% of the 95 respondents) expressed readiness, provided they received external support (**Figure 22**). Overall, 25% were likely to fund incremental improvements, such as cold storage and packaging, out of their budgets, and only 2% were already preparing for significant upgrades.

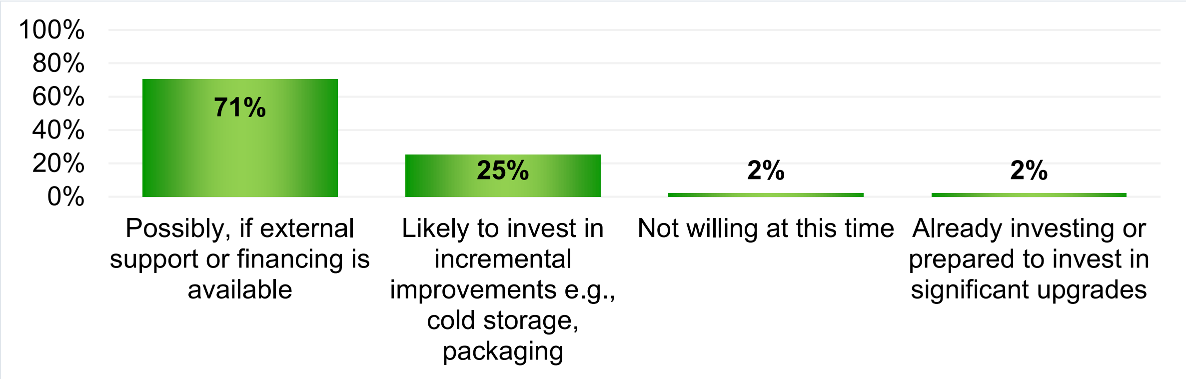

Figure 22: *Proportion of surveyed companies reporting their willingness to invest in upgrading its infrastructure to meet export requirements?*

Across countries, the vast majority of companies expressed readiness to upgrade infrastructure with external support: in Kenya, 73% were conditionally willing, 24% planned minor self-funded upgrades, and 3% declined; in Uganda, 70% needed support, 24% would self-fund minor upgrades, 3% were already gearing up for significant investments, and 3% were unwilling; in Tanzania, 68% relied on external backing, 28% would fund incremental improvements, and 4% were ready for significant upgrades.

By business age, startups (1–5 years) showed the greatest conditional willingness (75%), with 23% planning minor upgrades and no refusals. Amongst mid-career firms (6–10 years), 69% expressed conditional willingness, 28% planned self-funded improvements, and 3% were already investing heavily. Meanwhile, the highest share of firms aged more than 10 years (29%) planned incremental investments; 59% reported conditional willingness (59%), while 12% were not willing at this time.

These results highlighted that while financial constraints limited many companies' ability to self-fund large-scale infrastructure projects, they demonstrated a strong interest in enhancing their infrastructure (including cold-chain, storage, and packaging capabilities) once external support through grants, low-interest loans, or public-private partnerships, became available. These findings highlight the need for targeted funding support to help startups and mid-career firms translate their investment expectations into tangible upgrades and enhanced export readiness.

The conditional willingness of 71% of respondents reflects a genuine intent to invest, but it remains unrealized due to a lack of capital. A Kenyan certification body's rating of 3 out of 10 on companies' preparedness to meet organic standards highlights this gap: firms recognize that stronger market linkages, better prices, and regular inspections can drive upgrades, yet they lack the upfront funds to implement them. Similarly, Tanzanian informants' advocacy for SME-friendly loans reveals that existing credit conditions, high collateral requirements, short repayment windows, exclude many smallholders and early-growth firms.

> *"For preparedness to meet organic standards on a scale of 1-10 the score is 3. The firms are willing to invest but the limiting factor is finances. Incentives that push companies to upgrade facilities or processes include market linkages, good prices and continuous inspections. In fact, the reason companies give for postponing or reducing necessary investments is financial constraint"*

Official, Certification Body, Kenya

These financing barriers compound other challenges, such as high certification fees, technical skills shortages and weak logistics networks. Without targeted financing, companies cannot build the required infrastructure to meet buyers' needs, meaning the 25% of respondents planning only modest self-funded infrastructure upgrades remain unable to scale.

> *"The key challenges in Tanzania's organic sector include high certification costs, limiting market access, and limited technical expertise in meeting organic standards. Poor infrastructure, like cold storage and transport, affects product quality, while weak market linkages restrict connections with buyers beyond East Africa. Low government support, such as insufficient subsidies and complex export processes, further hinders growth. Addressing these issues requires financial aid, capacity building, infrastructure investment, and policy reforms to enhance sector competitiveness"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Notably, for companies to access working capital and insurance, they require easy access to concessional loans and grants to underwrite infrastructure upgrades, such as cold-chain hubs, refinancing schemes for traceability technology, and policy reforms. By reducing the financial barriers that companies face, as shown above, financiers can convert companies' intent into concrete investments.

3.5.9 Existing export commitments

Study findings (**Table 40**) reveal that a significant share of surveyed companies lacked firm export contracts, relying instead on informal agreements. Overall, 28% of the 95 respondents reported having no agreements so far, 32% held informal or verbal commitments, 26% possessed formal letters of intent, and only 14% enjoyed existing contractual agreements with regular international customers.

Among surveyed companies in Kenya, 38% had no export arrangements, 24% relied on verbal commitments, 30% secured letters of intent, and only 8% held binding contracts. In Uganda, 24% lacked any agreements, 36% had informal commitments, 24% held letters of intent, and 15% maintained ongoing contracts. Tanzania, on the other hand, had about 20% having no agreements, 36% relying on verbal promises, 24% holding letters of intent, and 20% enjoying repeat-buyer contracts.

Table 40: *Country-level analysis of the proportion of surveyed companies reporting their company's existing export contracts*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
d12. Which of the following best describes your company's existing export contracts?	Informal agreements or verbal commitments from buyers	24%	36%	36%	**32%**
	Formal letters of intent from potential buyers	30%	24%	24%	**26%**
	Existing contractual agreements with regular international customers	8%	15%	20%	**14%**
	No informal or formal agreements so far	38%	24%	20%	**28%**
	Total	**100%**	**100%**	**100%**	**100%**

Study data further shows that amongst younger companies (1–5 years), 27% had no agreements, 35% relied on verbal commitments, 31% held letters of intent, and just 6% managed active contracts. Comparatively, mid-career firms (6–10 years) fared better than younger firms, with 34% lacking agreements, 24% holding verbal commitments, 28% securing letters of intent, and 14% maintaining contracts. Established companies (over 10 years) excelled, as only 18% had no agreements, 35% relied on verbal commitments, 12% held letters of intent, and 35% enjoyed regular export contracts. This progression reflects how deeper networks and greater operational capacity, which come with experience, enable longer-standing firms to convert buyer interest into binding contracts.

Across the three countries, key informants highlighted strategies tailored to local strengths and networks that support companies in securing export contracts. Specifically, key informants reported internationally that trade fairs, B2B events, digital matchmaking platforms and government-facilitated export programs help bridge the gap in export contracts. For example, in Uganda, NOGAMU, with the support of the government and other private stakeholders, has used Swiss Import Promotion, involving sponsored matchmaking between vanilla and dried-fruit exporters and high-value European importers, illustrating how structured B2B forums have accelerated contract sign-ups.

> *"To secure export contracts, we support companies to participate in international trade fairs. Like every year, we participate in Germany, the BioFAQ, every February, where our members are showcasing different products. So, here there is direct exposure to international buyers, and also there's opportunities to benchmark against the competitors, see what other people are doing. Then the other that we do is business matchmaking and B2B platforms. So, as an association, NOGAMU facilitates direct B2B linkages by organizing buyer-seller forums, matchmaking, and also virtual marketplace. When you look at our website, we have our members' products that are selling. So, through this, in terms of business matchmaking, partnership with the Swiss Import Promotion Program, NOGAMU has linked Ugandan exporters of organic, vanilla, and dried fruit to premium buyers in Europe"*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

In Tanzania, TOAM officials indicated that support for fair participation and digital outreach enabled companies in the organic sector to meet buyers face-to-face and showcase their products, thus converting initial interest and inquiries into potential agreements.

> *"Companies secure export contracts and establish market linkages by participating in trade fairs, obtaining certifications, leveraging digital platforms, forming partnerships with facilitators, utilizing government support, conducting market research, networking with buyers, and accessing export financing"*

Official, Tanzania Organic Agriculture Movement (TOAM)

In Kenya, a KOAN official emphasized the importance of credible quality marks in securing contracts, thus, in addition to targeted buyer networking forums. Therefore, key informants emphasized the importance of following up networking at events with structured capacity building, particularly in relation to certification.

> *"To secure export contracts or establish market linkages, firms must attend fair trades, get linkages through KOAN and negotiations. The support that are most critical for companies for further development to meet export requirements for organic products include linkages, attending forums to interact with buyers, training and capacity building including on networking, and certification support etc."*

Official, Kenya Organic Agriculture Network (KOAN)

The above data from key informants illustrate why newer firms without extensive networks often remain at the letter-of-intent stage and why older, more established companies are more likely to secure binding contracts due to networking experience. Furthermore, while trade fairs remain vital, actual differentiation rests in the follow-up activities, such as targeted training, dedicated matchmaking, digital tools, and support from government especially on policy issues to transform informal interest into durable export relationships.

3.5.10 Short-term export readiness goals (12–24 months)

When asked about their company's short-term export readiness goal over the next 12–24 months (**Figure 23**), study findings reveal a strong focus among companies on building foundational export capabilities. Overall, 46% of the 95 respondents planned to obtain necessary certifications and upgrade facilities to meet basic export requirements, 33% intended to begin exploring organic export opportunities and gather market intelligence, and 14% aimed to scale production and establish long-term contracts for steady international presence. Only 6% had no plans to pursue export readiness, and a negligible 1% reported having already met their short-term readiness goals.

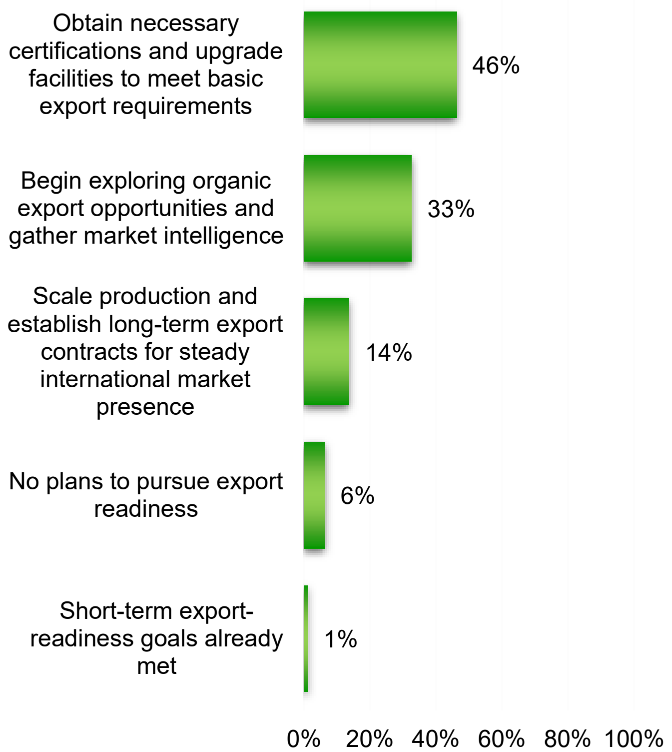

Figure 23: Proportion of surveyed companies reporting their company's short-term export readiness goal over the next 12–24 months

Country level analysis reveals that Ugandan and Tanzanian companies place greater emphasis on certification and facility upgrades (over 50%), while Kenyan firms balance initial market research (46%) with upgrades (35%). Specifically, 46% of companies in Kenya (n=37) planned to explore export markets and gather intelligence, 35% focused on certification and facility upgrades, 5% targeted production scaling and contract development, 11% had no readiness plans, and 3% had already met their goals. In Uganda (n=33), 55% prioritized certifications and facility improvements, 24% began market exploration, 15% aimed to scale production and secure long-term contracts, and 6% had no export plans. In Tanzania (n=25), 52% concentrated on certification and infrastructure upgrades, 24% explored export opportunities, and 24% planned to scale production and contracts, with none unprepared or already fully ready.

Thus, across the three countries (**Table 41**), most organic companies recognize that achieving export readiness hinges on certification and facility improvements, with a substantial minority also investing in market research and scaling production.

Table 41: Country-level analysis of the proportion of surveyed companies reporting their company's short-term export readiness goal over the next 12–24 months

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
d16. Which of the following best	No plans to pursue export readiness	11%	6%	0%	6%
	Begin exploring organic export opportunities and gather market intelligence	46%	24%	24%	33%

describes your company's short-term export readiness goal over the next 12–24 months?	Obtain necessary certifications and upgrade facilities to meet basic export requirements	35%	55%	52%	46%
	Scale production and establish long-term export contracts for steady international market presence	5%	15%	24%	14%
	Short-term export-readiness goals already met	3%	0%	0%	1%
	Total	100%	100%	100%	100%

3.5.11 Support needs for export-ready organic trade

Study findings (**Figure 24**) showed that nearly all surveyed companies required external assistance to advance their export readiness under EAOPS, with only 1% feeling fully self-sufficient. The most widely cited need was financial support or loans for infrastructure improvements, 92% overall, peaking at 100% in Tanzania and 89% in Kenya and Uganda. This strong demand reflects the critical capital investment gaps in cold storage, processing facilities, and traceability systems discussed earlier.

***Figure 24:** Proportion of surveyed companies reporting their company's short-term export readiness goal over the next 12–24 months*

Training in organic certification and compliance ranked a close second, with 79% of firms seeking this support (88% in both Uganda and Tanzania and 65% in Kenya). Given the 68% partial or full-compliance rate and key informants' emphasis on record-keeping and standard interpretation, tailored certification workshops remain a top priority.

Market research and buyer linkage services emerged as another primary need, identified by 73% of respondents (82% in Uganda, 72% in Tanzania, and 65% in Kenya). This finding aligns with the 33% of firms exploring export markets and the role of trade fairs, B2B matchmaking and digital platforms in converting intent into contracts.

Additionally, technical assistance in quality control and post-harvest management was cited by 69% overall (85% in Uganda, 68% in Tanzania, and 57% in Kenya), highlighting persistent infrastructure and handling deficits that negatively impact product quality and certification compliance.

Finally, logistics and supply chain optimization support ranked slightly lower but still significant at 58% overall (64% Tanzania, 58% Uganda, 54% Kenya), reflecting the transport and customs delays as earlier reported when assessing transport and logistics efficiency among surveyed companies and where key informants called for corridor upgrades and streamlined clearance processes.

3.6 Objective 5: Document the extent to which the companies are utilizing the EAOPS standard and other organic standards.

Introduction

The study assessed the extent to which the target companies are utilizing the East Africa Organic Products Standard (EAOPS) and other relevant organic certification standards. Specifically, this objective aimed to provide a clear picture of how well companies are adopting and complying with EAOPS as well as other international organic certification standards such as EU Organic and USDA Organic standards, which are critical for ensuring market access and maintaining product quality.

Summary of findings

a) **Organic certification status and challenges:** Study findings show that just 22% of surveyed companies held current organic certification, while 60% produced to organic standards without formal accreditation. Tanzania led in formal certification at 36%, notably higher than Uganda (18%) and Kenya (16%), while Uganda dominated in uncertified adopters (73%) compared to Kenya (57%) and Tanzania (48%). Fifteen per cent remained conventional but planned to transition, with the highest percentage in Kenya (22%), followed by Tanzania (16%) and Uganda (6%). A minor share (3%) had no near-term certification plans, predominantly in Kenya (5%) and Uganda (3%). Older firms (those over 10 years) were most likely to be certified (41%), compared to mid-career companies (28%) and early-growth companies (13%). Key informants confirmed that high certification costs, complex traceability requirements, social standards audits, and low EAOPS awareness, particularly in Kenya and Uganda, significantly undermine formal certification.

b) **Planned organic certification timelines:** Among the 48 uncertified respondents, 94% intend to pursue certification, with 58% planning to do so within one year and 35% within two to three years; only 6% have no plans. Uganda showed the strongest short-term commitment (86% within 12 months), followed by Tanzania (63%) and Kenya (48%). Start-ups and mid-career firms split almost evenly between one-year and two-to-three-year plans, whereas mature firms demonstrated strong near-term readiness (75% within 12 months). This robust pipeline highlights a sector-wide eagerness to formalize organic credentials swiftly.

c) **Audit outcomes and documentation:** Among the surveyed 21 certified companies, audit results varied: 48% reported compliance without significant issues, 10% achieved "fully compliant" status, and another 10% required only minor corrections. Conversely, 14% faced major non-conformities, and 19% had no recent audit. Documentation revealed a strong correlation with audit outcomes; 62% maintained comprehensive records, 10% utilized advanced digital traceability, 19% had partial documentation, and 10% struggled significantly, thereby complicating verification efforts.

d) **Familiarity with EAOPS:** Overall, 69% of surveyed companies had heard of EAOPS, yet only 6% were already certified. Of the respondents, 31% remained unaware, with Kenya reporting the highest unawareness (35%), followed by Uganda (33%) and Tanzania (20%). Meanwhile, 35% knew of EAOPS but remained uncertified, notably higher in Kenya (49%), with Uganda at 27% and Tanzania at 24%. Tanzania (40%) recorded highest active consideration of EAOPS certification, followed closely by Uganda (39%), and Kenya

(11%). Key informants highlighted this knowledge gap as a critical area for targeted outreach and training.

e) **Financial readiness for EAOPS transition:** Among 35 EAOPS-aware but uncertified companies, only 11% had allocated transition funds, with the highest allocations in Uganda (17%), Tanzania (13%), and Kenya (8%). Conversely, 80% were willing to invest conditionally, based on access to external financing, especially in Tanzania (88%) and Kenya (85%), while Uganda showed significant financial constraints (33% unlikely to invest). Interviewed key informants emphasized that high compliance costs, limited incentives and preferences for international certifications hindered the uptake of EAOPS, highlighting the urgent need for dedicated financial support mechanisms.

f) **Future EAOPS certification plans:** All 35 EAOPS-aware companies intend to engage within 2–3 years; 89% plan to initially certify under EAOPS, notably all Ugandan (100%) and most Tanzanian (94%) respondents, compared to 77% in Kenya. Eleven per cent intend to renew or upgrade their existing EAOPS accreditation, the highest in Uganda (17%) and Kenya (15%) and the lowest in Tanzania (6%). Moreover, 20% of the plan by surveyed firms involves complementary international certifications, with Tanzania leading (31%), followed by Uganda (17%), and 8% in Kenya, highlighting a strategic approach to leveraging EAOPS for broader market access.

3.6.1 Organic certification status and challenges

Study findings (**Figure 25**) show that only 22% of the 95 surveyed companies were currently certified for organic production. In comparison, a majority (60%) reported producing according to organic standards but had not yet secured formal certification. Fifteen per cent described themselves as conventional with an interest in transitioning, and at least 3% indicated no immediate plans to pursue organic accreditation.

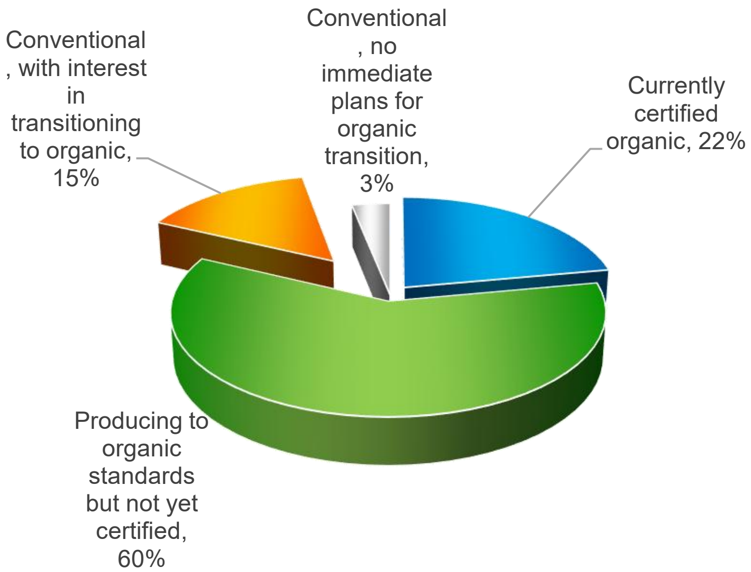

Figure 25: Proportion of surveyed companies reporting that they are currently certified for organic production

Certification rates varied notably by country. In Tanzania, 36% of respondents held current organic certification, the highest among the three countries, compared with 18% in Uganda and 16% in Kenya. Conversely, Uganda led in uncertified adoption, with 73% of its companies producing to standards but awaiting certification, compared to 57% in Kenya and 48% in Tanzania. Kenya and Uganda each had small shares (3–5%) of purely conventional firms with no near-term transition plans. See **table 42** for further analysis by country.

Table 42: Country-level analysis of the proportion of surveyed companies reporting that they are currently certified for organic production

Question	Category	s3. Country of operation.		
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)
e1. Is your company currently certified for organic production?	Currently certified organic	16%	18%	36%
	Producing to organic standards but not yet certified	57%	73%	48%
	Conventional, with interest in transitioning to organic	22%	6%	16%
	Conventional, no immediate plans for organic transition	5%	3%	0%
	Total	**100%**	**100%**	**100%**

Firm age also influenced certification status (**Table 43**). Companies operating for over ten years were most likely to be certified (41%), while those in the 6–10-year bracket lagged at 28%, and early-growth companies (1–5 years) were certified at only 13%. Across all age groups, around 60% were practising organic methods without formal certification, highlighting a widespread willingness to meet standards but persistent barriers to final accreditation.

Table 43: *Business age analysis of the proportion of surveyed companies reporting that they are currently certified for organic production*

Question	Category	s3. Country of operation.		
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)
e1. Is your company currently certified for organic production?	Currently certified organic	13%	28%	41%
	Producing to organic standards but not yet certified	65%	62%	41%
	Conventional, with interest in transitioning to organic	17%	10%	18%
	Conventional, no immediate plans for organic transition	6%	0%	0%
	Total	**100%**	**100%**	**100%**

Key informants confirmed these patterns and highlighted the certification obstacles firms encounter. A KOAN official in Kenya noted that while most companies are familiar with EU standards, they struggle with the "high cost of certification, significant investments to meet traceability requirements and the complexity of social standards audits." He also reported that EAOPS remains unknown mainly among Kenyan companies, leading to "challenges on awareness, knowledge and interpretation of EAOPS and the cost of certification."

> *"EU certification are familiar to most companies. The challenges are high cost of certification, require big investments due to trait requirement, prominent to social standards certification. KOAN provides capacity building on documentation, precertification and working on corrective actions. Familiarity of companies with EAOPS...majority in Kenya are not aware of EAOPS. Majority experience challenges on awareness, knowledge and interpretation of EAOPS and the cost of certification."*

Official, Kenya Organic Agriculture Network (KOAN)

In Tanzania, the TOAM representative described a dual dynamic: "Companies already engaged in organic trade and farming are very familiar with EAOPS, thanks to our regional and international capacity-building and monitoring efforts; however, those not yet trading in organic products remain largely unaware of these standards."

> *"TOAM as an umbrella of organization for organic development in Tanzania, we do organic certification through EAOPS, capacity building/training on organic certification both regional and international standards to trainers/NGO/ CSO, and monitoring application of EAOPS/EAOM. Those companies that are engaged in organic trade/farming are very familiar with the EAOPS but its vice versa to companies that are not dealing with organic farming/trade. Those companies that engaged in organic trade/farming are very familiar with the EAOPS but its vice versa to companies that are not dealing with organic farming/trade"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Likewise, Uganda's NOGAMU official emphasized uneven EAOPS understanding: "The level of awareness of EAOPS varies from company to company. We still have much work to do in creating awareness and building audit capacity, challenges that feed directly into why many firms remain uncertified despite producing to organic methods."

> *"Now, the level of understanding of EAOPS in Uganda varies from company to company. But I can assure you, the level of understanding in general is still with regard to the East African Organic Product Standard. We still have a lot of work to do. So that's what I can say in summary. There's a lot of work to do in terms of creating awareness about EAOPS. Hence certification challenges related to EAOPS is mainly knowledge and audit capacity."*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

Together, these quantitative and qualitative findings paint a picture of a sector motivated to pursue organic certification but constrained by financial, technical and informational barriers, particularly around EAOPS awareness and audit readiness. Targeted capacity-building, subsidized certification support, and focused outreach on regional standards emerge as critical tools to convert organic practices into formal accreditation.

Furthermore, among the 21 surveyed companies already holding organic accreditation, only 10% of these companies reported having a single organic certification with no plans to pursue additional credentials, indicating a small proportion satisfied with their current market access. The majority, 52%, held one certification but actively pursued further accreditations, reflecting a strategic effort to enter new export markets or meet multiple buyer requirements. A substantial 38% of certified respondents already hold more than one organic certification, demonstrating a high level of commitment and resource capacity to navigate diverse standards.

Thus, companies are layering standards to maximize regional and international opportunities. Key informants noted that firms often begin with the most accessible certification, typically local or EU-compliant, before adding EAOPS, USDA NOP, Bio Suisse or other premium labels. The fact that 90% of certified respondents either seek additional certifications or already hold multiple badges highlights both the high competitiveness in global organic markets and the opportunities available for companies with diversified accreditations.

3.6.2 Planned organic certification timelines

Asked if they plan to obtain organic certification, nearly all of the 48 surveyed companies not currently certified reported that they intended to pursue organic accreditation, reflecting the sector's strong commitment to formalising organic practices in line with the study's export-readiness objectives. Only 6% of respondents reported no plans for certification, highlighting a clear pipeline toward formal organic status.

Country variations emerged in certification plans (**Table 44**). In Uganda, where companies already exhibit high engagement with organic networks, 86% of the seven uncertified firms aimed to complete certification within the next year, and 14% had no immediate plans. Tanzanian respondents followed closely, with 63% targeting the coming 12 months and 38% projecting a 2–3-year timeframe; none ruled out certification altogether. Kenyan companies displayed a somewhat longer horizon: 48% planned certification within one year, 44% within two to three years, and 8% had no current plans.

Table 44: *Country-level analysis of the proportion of surveyed companies planning to obtain organic certification in the future*

Question	Category	s3. Country of operation.			Total (n=48)
		Kenya (n=25)	Uganda (n=7)	Tanzania (n=16)	
e2. Is your company planning to obtain organic certification in the future?	Yes, within the next year	48%	86%	63%	**58%**
	Yes, within 2–3 years	44%	0%	38%	**35%**
	No plans for certification	8%	14%	0%	**6%**
	Total	100%	100%	100%	**100%**

Age-based patterns further illustrated how maturity shapes investment timing (**Table 45**). Among startups and early-growth firms (1–5 years old), 54% expected to certify within a year, while 46% anticipated a two- to three-year process. Mid-career companies (6–10 years) showed a similar split, 62% fast-tracking certification and 31% in the longer bracket, though 8% had no plans. The most established companies (those over 10 years old) led the near-term group, with 75% seeking certification within 12 months; smaller shares (13% each) planned a 2–3-year path or opted out.

Table 45: *Business-age analysis of the proportion of surveyed companies planning to obtain organic certification in the future*

Question	Category	a4. How long has your business been operating?			Total (n=48)
		1–5 years (n=26)	6–10 years (n=13)	10 years+ (n=8)	
e2. Is your company planning to obtain organic certification in the future?	Yes, within the next year	54%	62%	75%	**58%**
	Yes, within 2–3 years	46%	31%	13%	**35%**
	No plans for certification	0%	8%	13%	**6%**
	Total	100%	100%	100%	**100%**

Comprehensive documentation is key to successful audit outcomes and consequently acquisition of organic certification. However, analyses of audit outcomes and documentation robustness among the 21 certified companies show mixed results (**Figure 26**). Nearly half (48%) of the firms reported being "compliant with no major issues noted" during their most recent external audit, suggesting a complete alignment with organic standards. One in ten (10%) achieved the highest score (fully compliant and praised for high standards), while another 10% required only minor corrective actions. However, 14% of respondents faced significant non-compliance, triggering major corrective actions, and 19% had not undergone a recent audit.

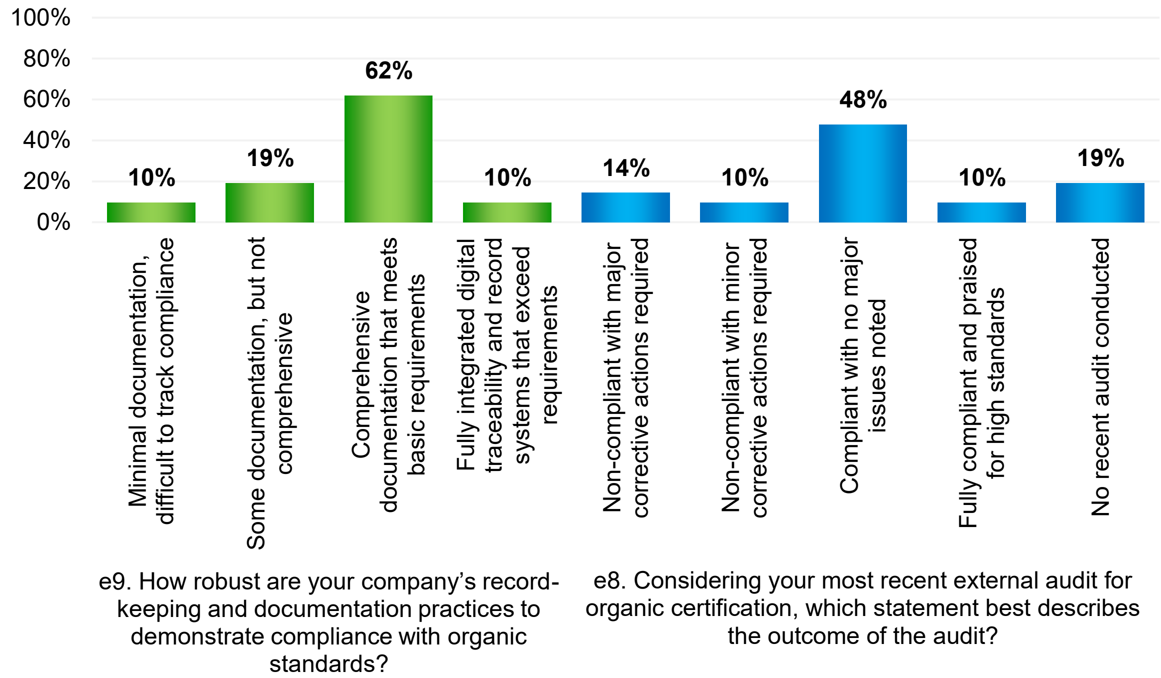

Figure 26: *Proportion of surveyed companies reporting about the robustness of their record-keeping and documentation and the outcome of the most recent audit*

Regarding record-keeping, approximately 62% of the surveyed companies reported maintaining comprehensive documentation that meets basic requirements, while 10% had fully integrated digital traceability and record systems that exceeded requirements. Additionally, nearly one out of every five companies surveyed (19%) reported partial documentation, thus leaving gaps in compliance tracking. A further 10% struggled with minimal records, which made verification difficult.

3.6.3 Familiarity with the East Africa Organic Products Standard (EAOPS)

A key objective of this study was to measure knowledge levels about East African Organic Products Standard (EAOPS) as a crucial variable on export readiness under regional standards. According to study findings (**Table 46**), awareness and engagement with EAOPS varied markedly across the 95 surveyed companies.

Table 46: *Country analysis of surveyed companies reporting familiarity with EAOPS*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
e10. How familiar is your company with the East Africa Organic Products Standard (EAOPS)?	Not aware of EAOPS	35%	33%	20%	**31%**
	Aware of EAOPS but have not sought certification	49%	27%	24%	**35%**
	Aware of EAOPS and considering pursuing certification	11%	39%	40%	**28%**
	Aware of EAOPS and already certified to this standard	5%	0%	16%	**6%**

	Total	**100%**	**100%**	**100%**	**100%**

Although 69% of the 95 surveyed companies had at least heard of EAOPS, study findings show that genuine understanding and engagement with this regional standard remain uneven, closely mirroring the sentiments of key informants. In Uganda, for example, 33% of respondents reported no awareness of EAOPS, and another 27% knew of it but had not pursued certification. NOGAMU's official confirmed this gap:

> *"Now, the level of understanding of EAOPS in Uganda varies from company to company. But I can assure you, the level of understanding in general is still limited with regard to the East African Organic Product Standard. We still have a lot of work to do. So that's what I can say in summary. There's a lot of work to do in terms of creating awareness about EAOPS. Hence certification challenges related to EAOPS is mainly knowledge and audit capacity."*

Official, National Organic Agricultural Movement of Uganda (NOGAMU)

This observation from the NOGAMU official explains why a low proportion of Ugandan firms (39%) are actively considering or have already achieved EAOPS accreditation. In Tanzania, 20% of companies remained unaware of EAOPS, while 40% were considering certification, and 16% already held the standard. TOAM's representative had this to say:

> *"Those companies that are engaged in organic trade/farming are very familiar with EAOPS, but it is vice versa for companies not dealing with organic farming/trade"*

Official, Tanzania Organic Agriculture Movement (TOAM)

This observation can be attributed to the fact that companies already embedded in organic value chains in Tanzania have leveraged TOAM's capacity-building workshops and certification monitoring to adopt EAOPS, whereas newer or conventional players lack exposure.

Meanwhile, Kenya recorded the highest proportion of respondents either unaware of EAOPS (35%) or had yet to translate awareness into active certification (49%). Thus, despite KOAN's certification support, EAOPS outreach has not penetrated deeply into Kenya's broader agricultural sector.

3.6.4 Motivations for pursuing EAOPS Certification

Study findings show that meeting buyer and export-market requirements topped the list of drivers for EAOPS certification, cited by 30% of the 37 companies either already certified or actively considering accreditation. This explanation was most popular in Kenya (38%) compared to Tanzania (29%) and Uganda (20%).

Additionally, 27% of the surveyed companies reported that they sought EAOPS to improve product quality and credibility, especially in Tanzania, where 36% of firms emphasized this benefit. Access to premium pricing emerged as the principal driver for 16% of surveyed companies, with 23% in Kenya and 20% in Uganda. Although less pronounced in Tanzania (7%), these figures highlight that price incentives remain a key consideration as well.

Study findings (**Figure 27**) also show that alignment with corporate sustainability and environmental goals motivated approximately one out of every four respondents (24%), primarily in Uganda (30%) and Tanzania (29%). These companies view EAOPS certification not only as a market-access tool but also as a reflection of their organizational values and commitments to environmental issues.

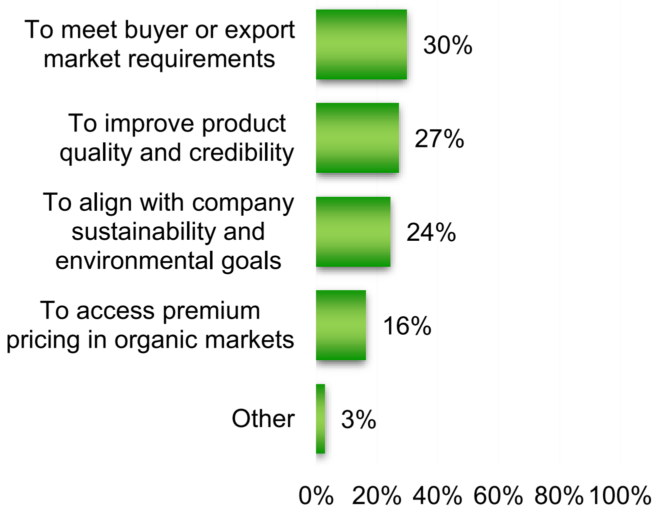

***Figure 27:** Proportion of surveyed companies indicating the primary reason(s) for being EOAPS-certified or considering EAOPS certification*

Only a small share (3%) cited other reasons, indicating that the vast majority of EAOPS-focused firms orient their certification strategies around concrete market access, quality assurance, pricing, and sustainability objectives. Thus, companies seek EAOPS to meet the demands of export markets, enhance the credibility of their organic products, capture higher margins, and demonstrate their environmental commitments.

3.6.5 Financial readiness for EAOPS transition

Among the 35 surveyed companies aware of EAOPS but not yet certified, the study results **(Table 47)** show that virtually all indicated their willingness to invest in transitioning to organic certification and compliance with EAOPS, although with varying levels of preparedness. Only 11% reported having funds already allocated for EAOPS compliance, while 80% said they would "possibly" invest, contingent on access to credit, grants, or subsidies. A small minority (9%) described themselves as unlikely to invest due to financial constraints.

***Table 47:** Country analysis of the proportion of surveyed reporting familiarity with EAOPS*

Question	Category	s3. Country of operation.			Total (n=35)
		Kenya (n=13)	Uganda (n=6)	Tanzania (n=16)	
e19. If you are aware of EAOPS but not EAOPS-certified, is your company willing to invest financially in transitioning to organic certification and compliance with EAOPS?	Yes, we have funds allocated for this transition	8%	17%	13%	**11%**
	Possibly, depending on available credit, grants, or subsidies	85%	50%	88%	**80%**
	Unlikely, due to financial constraints	8%	33%	0%	**9%**
	No	0%	0%	0%	**0%**
	Total	**100%**	**100%**	**100%**	**100%**

Country breakdowns show slight differences in readiness. In Kenya, only 8% of 13 companies had dedicated budgets for EAOPS, while 85% awaited external financing and 8% felt constrained. Among Ugandan respondents, 17% had already allocated funds for transition, 50% conditional on support, while fully one-third (33%) doubted they could invest. In Tanzania, 13% had allocated funds for the transition, and 88% based their decision on subsidies or loans, with none ruling out EAOPS investment. This broad, but conditional, commitment aligns with key informants' insights. The TOAM official in Tanzania noted that adoption

> *"Encouraging companies to adopt EAOPS is challenged by limited awareness, the perceived high cost of compliance, and a preference for internationally recognized certifications like EU Organic or USDA Organic. Insufficient infrastructure, restricted access to organic inputs, and minimal government incentives further hinder the transition to organic practices under EAOPS standards"*

Official, Tanzania Organic Agriculture Movement (TOAM)

These barriers help explain why only 10% of the surveyed firms have adequate funds for EAOPS plans, with most relying on external financial mechanisms.

Moreover, the same informant observed that while EAOPS remains "cost-effective and tailored to local conditions, its limited global visibility makes international certifications more appealing for export-oriented businesses", a position that amplifies the need for targeted grants and low-interest credit to spur the uptake of regional standards among the small-to-medium companies.

> *"Awareness of EAOPS is lower compared to internationally recognized certifications like EU Organic and USDA Organic, which are often prioritized by Tanzanian companies for access to global markets. While EAOPS is cost-effective and tailored to local conditions, its limited global visibility makes international certifications more appealing for export-oriented businesses, and thus is therefore EAOPS commonly used by smallholder organic producers and startup companies"*

Official, Tanzania Organic Agriculture Movement (TOAM)

Thus, study data show that companies recognize the strategic value of EAOPS but express a dependence on external financing to underwrite the transition activities, such as infrastructure upgrades, audits, and input sourcing.

Asked about the areas they would most likely invest in to support their transition to EAOPS certification, three out of every four respondents (75%) aware of EAOPS but not yet certified identified certification fees and auditing costs as their top investment priority. This finding aligns with the "perceived high cost of compliance" that key informants reported as a barrier to the uptake of certification services by companies in the organic sector.

Further analysis of study data (**Figure 28**) shows that infrastructure and facility upgrades ranked a close second at 68%, thus highlighting the recognition by respondents that their existing processing, storage and traceability systems fall short of EAOPS requirements. In Kenya, 73% of the 11 companies identified facility investments, and 69% of Tanzanian firms likewise prioritized upgrades.

More than half of the surveyed companies also planned to invest in marketing and promotion (64%) and staff training (57%), highlighting two critical factors crucial for certification and market entry. Kenyan respondents prioritized marketing (82%), while Tanzanian firms placed equal emphasis on capacity building (63%). Furthermore, the procurement of organic inputs, such as certified seeds and fertilizers, was third in line at 43%, reflecting the need to source compliant inputs for EAOPS accreditation. Over half of Kenyan firms (55%) and 38% of Tanzanian companies cited this area as a key concern.

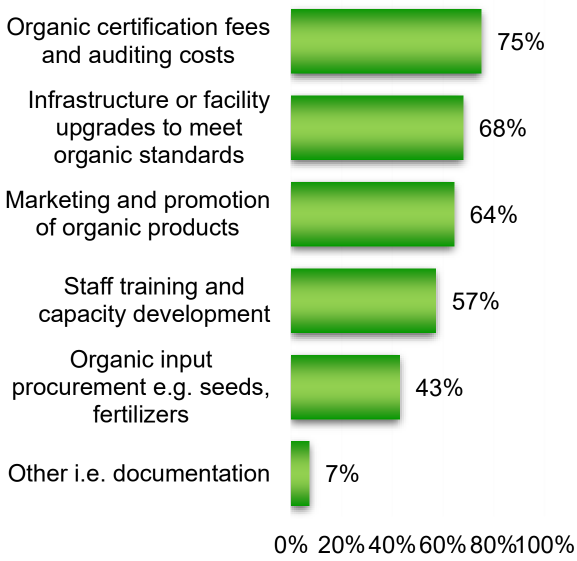

Figure 28: Proportion of surveyed companies indicating where they would most likely invest in to support their transition to EAOPS certification

These findings align with the TOAM official's observation that *"insufficient infrastructure, restricted access to organic inputs, and minimal government incentives" hinder* EAOPS adoption. Thus, dedicated funding for certification fees and targeted investments in facilities, inputs, marketing and training would directly address the above barriers that respondents identified as the most urgent toward full EAOPS compliance.

3.6.6 Future East Africa Organic Products Standard (EAOPS) certification plans

All 35 surveyed companies aware of EAOPS intend to engage with the regional standard over the next 2–3 years. According to the study findings (**Figure 29**), a majority, 89% overall, reported "considering initial EAOPS certification," with only a handful preparing to renew or expand existing accreditation.

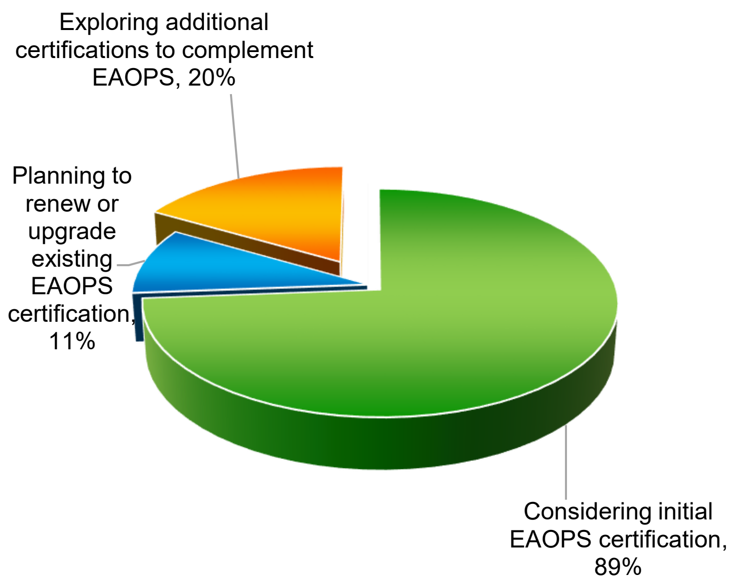

Figure 29: Proportion of surveyed companies indicating their plans regarding EAOPS certification over the next 2–3 years

At the country level (**Table 48**), every Ugandan respondent (100%) and nearly all Tanzanian firms (94%) were weighing their first EAOPS application, compared with 77% in Kenya. Meanwhile, 11% of all companies planned to "renew or upgrade existing EAOPS certification," led by Uganda (17%) and Kenya (15%), accounting for just 6% in Tanzania. A further 20% of respondents aimed to "explore additional certifications to complement EAOPS," notably 31% of Tanzanian companies, reflecting their layered approach to premium markets.

Table 48: *Country analysis of the proportion of surveyed companies indicating their plans regarding EAOPS certification over the next 2–3 years*

Question	Plan	s3. Country of operation.			Total (n=35)
		Kenya (n=13)	Uganda (n=6)	Tanzania (n=16)	
$e22. Over the next 2–3 years, what are your company's plans regarding EAOPS certification? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	No plans to pursue or maintain EAOPS certification	0%	0%	0%	**0%**
	Considering initial EAOPS certification	77%	100%	94%	**89%**
	Planning to renew or upgrade existing EAOPS certification	15%	17%	6%	**11%**
	Exploring additional certifications to complement EAOPS	8%	17%	31%	**20%**
	Total	**100%**	**100%**	**100%**	**100%**

Key informants noted that limited awareness and infrastructure gaps hindered the uptake of EAOPS. These survey results suggest that, despite these barriers, companies recognize EAOPS as foundational, planning first-time certification before pursuing upgrades or supplementary labels, such as EU Organic or USDA NOP certification.

By prioritizing initial accreditation, study participants signal a collective shift toward regional harmonization under the EAOPS. The smaller proportions of companies planning renewals or complementary certifications highlight a secondary stage in the certification journey. Once firms clear the initial EAOPS hurdle, they often stack further credentials to access global niches. Together, these data confirm that EAOPS sits at the core of export-readiness strategies, with companies mobilizing resources now to meet their requirements.

3.7 Objective 6: Identify challenges (including trade barriers) and opportunities that these companies face.

Introduction

Under this objective, the study sought to identify challenges, including trade barriers, and opportunities that companies in the organic sector face to help uncover the obstacles hindering the growth of organic trade while also highlighting areas of potential expansion and development within the industry.

Thus, the study assessed specific barriers, ranging from information gaps and policy shortcomings to financing constraints, logistics deficits, and regulatory complexities, that limited companies' ability to scale their organic exports under existing trade frameworks. Thus, the study examined the external obstacles that companies faced when seeking to expand regionally and internationally.

Summary of findings

a) External barriers to regional and international expansion: Surveyed firms face interlinked barriers when seeking to expand. Two-thirds (67% overall: 73% in Kenya, 70% in Uganda, 56% in Tanzania) report unreliable export market data, highlighting a dire need for better intelligence services. Six in ten (60% overall: 54% in Kenya, 67% in Uganda, 60% in Tanzania) cite weak government incentives and restricted access to export financing, particularly acute in Uganda. Just over half (53% overall: 51% in Kenya, 52% in Uganda, 56% in Tanzania) struggle with poor transport networks that cause shipment delays. Nearly half (49% overall: 49% in Kenya, 64% in Uganda, 32% in Tanzania) are deterred by complex customs procedures, and four in ten (40% overall: 41% in Kenya, 45% in Uganda, 32% in Tanzania) face arduous non-tariff requirements like phytosanitary checks. Further constraints, from raw-material quality (34%: 35% in Kenya, 36% in Uganda, 28% in Tanzania) and consistency (32%: 30% in Kenya, 36% in Uganda, 28% in Tanzania) to high tariffs (29%: 32% in Kenya, 33% in Uganda, 20% in Tanzania) and dominant global brands (19%: 19% in Kenya, 24% in Uganda, 12% in Tanzania), stifle many exporters' growth trajectories.

b) Opportunities to accelerate organic growth: Despite constraints, companies see clear paths forward. Sixty-five percent plan to diversify into value-added products (65% overall: 62% in Kenya, 70% in Uganda, 64% in Tanzania), moving beyond raw commodities into processed goods, specialty blends, and packaged organics. Emerging premium niche markets for health-focused consumers rank a close second at 63% (54% in Kenya, 61% in Uganda, 80% in Tanzania), driven especially by Tanzanian firms. Strong global demand, cited by 61% (43% in Kenya, 73% in Uganda, 72% in Tanzania), offers an expanding customer base, while 61% also recognize technology, digital traceability and e-commerce platforms (59% in Kenya, 67% in Uganda, 56% in Tanzania), as key enablers. Finally, 61% (54% in Kenya, 70% in Uganda, 60% in Tanzania) value enhanced public-private partnerships for training, grants, and policy support.

c) Priorities to overcome challenges and boost competitiveness: Companies support a multi-faceted strategy. Approximately 71% prioritize securing external support for market intelligence and buyer linkages (57% in Kenya, 85% in Uganda, 72% in Tanzania). Nearly as many (69%: 62% in Kenya, 70% in Uganda, 80% in Tanzania) stress improved marketing and branding strategies to command premiums. Two-thirds (67%: 54% in Kenya, 73% in Uganda, 80% in Tanzania) advocate collective certification schemes to lower compliance costs, and 66% (59% in Kenya, 73% in Uganda, 68% in Tanzania) call for strategic infrastructure investments in cold storage and processing lines. Finally, 61% (51% in Kenya, 73% in Uganda, 60% in Tanzania) see robust internal management and quality-control systems as essential foundations for sustained competitiveness.

d) Supportiveness of national policy and regulatory environments: Most firms find their national frameworks only "somewhat" supportive, with 57% overall (43% in Kenya, 64% in Uganda, 68% in Tanzania) reporting basic guidelines with gaps. One-fifth (20% overall: 35% in Kenya, 6% in Uganda, 16% in Tanzania) view policies as unclear or restrictive. A small share (8% overall: 8% in Kenya, 6% in Uganda, 12% in Tanzania) find them moderately supportive, and only 7% (8% in Kenya, 12% in Uganda, 0% in Tanzania) experience clear, incentive-driven environments. This uneven landscape, with Uganda showing the greatest confidence and Tanzania the most skepticism, signals an urgent need for clearer regulations, stronger incentives, and tighter alignment with global benchmarks.

e) Impact of trade agreements on organic exports: Regional and international trade treaties hold untapped potential: 48% overall (51% in Kenya, 48% in Uganda, 44% in Tanzania) acknowledge some opportunities under frameworks like the EAC protocols or AfCFTA but lack capacity or awareness to leverage them fully. Only 11% (8% in Kenya, 9% in Uganda, 16% in Tanzania) report significant benefits from preferential rules. Thirteen percent (16% in Kenya, 12% in Uganda, 8% in Tanzania) feel agreements add complexity rather than relief, and 16% (11% in Kenya, 15% in Uganda, 24% in Tanzania) remain unaware of their implications. Enhanced guidance and capacity-building are therefore essential to transform these agreements into concrete market-access gains.

3.7.1 External barriers to regional and international expansion

Study findings **(Table 49)** show that surveyed companies faced a complex web of external constraints that hindered their ability to scale in regional and global organic markets. Foremost, 67% of respondents cited limited market information or lack of reliable export data (73% in Kenya, 70% in Uganda, and 56% in Tanzania), reflecting the persistent knowledge gap that 33% aimed to close through market intelligence services. Closely behind, 60% identified insufficient government support or incentives as a significant barrier (54% in Kenya, 67% in Uganda, and 60% in Tanzania), thus highlighting the call for policy reforms and subsidy schemes earlier reported by key informants.

Access to finance ranked third, with 59% of respondents reporting restricted credit for export-related activities (38% in Kenya, 82% in Uganda, and 60% in Tanzania). Ugandan firms felt this most acutely (82%), mirroring their 70% conditional willingness to invest in infrastructure if external funding were available. Transport and logistics deficits, such as unreliable shipping and poor roads, affected 53% of companies (51% in Kenya, 52% in Uganda, and 56% in Tanzania), reinforcing earlier findings that 66% experienced frequent or occasional delays and fueling the 58% demand for logistics assistance, as earlier reported.

Documentation and customs complexity deterred 49% of firms (49% in Kenya, 64% in Uganda, and 32% in Tanzania), especially in Uganda (64%), indicating an urgent need for streamlined clearance procedures and export facilitation. Non-tariff barriers, such as complex certification requirements and strict phytosanitary standards, were cited by 40% of respondents (41% in Kenya, 45% in Uganda, and 32% in Tanzania). In comparison, 39% struggled with strict international regulations (35% in Kenya, 45% in Uganda, and 36% in Tanzania), echoing informants' earlier calls for more precise guidance on EAOPS and other standards.

Raw material constraints, both in terms of quality (34% overall: 35% in Kenya, 36% in Uganda, and 28% in Tanzania) and consistency (32% overall: 30% in Kenya, 36% in Uganda, and 28% in Tanzania), highlighted supply-chain vulnerabilities, while 29% flagged high export tariffs (32% in Kenya, 33% in Uganda, and 20% in Tanzania) as a cost burden. Finally, 19% felt the presence of dominant global organic brands crowded market entry (19% in Kenya, 24% in Uganda, and 12% in Tanzania), highlighting the competitive pressures young exporters face.

Table 49: *Country-level analysis of the proportion of surveyed companies reporting external barriers that limit their company's ability to expand in the organic market, especially regionally or internationally*

Question	Barrier	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	**Uganda (n=33)**	**Tanzania (n=25)**	
*f3. Which external barriers limit your company's ability to expand in the organic market, especially regionally or internationally? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	Limited market information or lack of reliable data on export markets	73%	70%	56%	**67%**
	Lack of government support or incentives for organic market expansion	54%	67%	60%	**60%**
	Restricted access to financing or credit for export-related activities	38%	82%	60%	**59%**
	Inadequate transport and logistics infrastructure e.g., unreliable shipping, poor road networks	51%	52%	56%	**53%**
	Difficulty meeting documentation and customs requirements for export	49%	64%	32%	**49%**
	Non-tariff barriers e.g., complex certification requirements, strict phytosanitary standards	41%	45%	32%	**40%**
	Strict international regulations making compliance complex and challenging	35%	45%	36%	**39%**
	Limited access to high quality raw materials for production	35%	36%	28%	**34%**
	Inconsistent or unreliable availability of organic raw materials	30%	36%	28%	**32%**
	High tariffs on organic products	32%	33%	20%	**29%**
	Presence of dominant organic brands making expansion difficult	19%	24%	12%	**19%**
	Other	3%	3%	0%	**2%**
	Total	**100%**	**100%**	**100%**	**100%**

3.7.2 Opportunities to accelerate organic growth

When asked about the potential opportunities they could leverage to grow in the organic market (**Table 50**), a majority of respondents (65% overall: 62% in Kenya, 70% in Uganda, 64% in Tanzania) cited the possible diversification of their product range or the addition of value-added organic products. This point reflects the companies' interest in moving beyond raw commodities into processed goods, speciality blends, and packaged organic products. Emerging premium niche markets for health-conscious consumers and retailers ranked a close second at 63% (54% in Kenya, 61% in Uganda, and 80% in Tanzania), driven primarily by Tanzanian respondents.

Increasing global demand for organic products was highlighted by 61% (43% in Kenya, 73% in Uganda, and 72% in Tanzania), emphasising how broader consumer trends create opportunities for exports. Similarly, 61% of the surveyed companies (59% in Kenya, 67% in Uganda, 56% in Tanzania) cited improved technological solutions, such as digital traceability systems and e-commerce platforms, as enablers of market access and brand differentiation.

Finally, 61% of the surveyed firms (54% in Kenya, 70% in Uganda, 60% in Tanzania) highlighted the importance of collaborating with public and private sector to enhance their capacities, access to finance and supporting policy initiatives.

Table 50: *Country-level analysis of the proportion of surveyed companies reporting potential opportunities that they could leverage to grow in the organic market*

Question	Type of opportunity	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
$f6. Which potential opportunities could your company leverage to grow in the organic market? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	Potential to diversify product range or add value-added organic products	62%	70%	64%	**65%**
	Emerging premium niche markets e.g., health-conscious consumers, specialty retailers	54%	61%	80%	**63%**
	Increasing global consumer demand for organic products	43%	73%	72%	**61%**
	Improved technological solutions e.g. digital traceability, e-commerce platforms	59%	67%	56%	**61%**
	Enhanced support from government or development partners on training, grants	54%	70%	60%	**61%**
	Other	0%	3%	0%	**1%**
	Total	**100%**	**100%**	**100%**	**100%**

3.7.3 Priorities to overcome challenges and boost competitiveness

Analysis of priorities to address the above challenges show that surveyed companies recognize the necessity of a multi-pronged approach to thrive in the organic market (**Table 51**). The top priority, cited by 71% of respondents (57% in Kenya, 85% in Uganda, and 72% in Tanzania), was securing external support for enhanced market intelligence and buyer linkages. This point reflects the critical knowledge and network gaps identified earlier. Close behind, 69% emphasized improving marketing and branding strategies to distinguish organic products (62% in Kenya, 70% in Uganda, and 80% in Tanzania). Companies highlighted the importance of clear brand differentiation in driving premiums in both domestic and export markets.

Reducing certification and compliance costs through collective or group certification schemes ranked third, with an overall score of 67% (54% in Kenya, 73% in Uganda, and 80% in

Tanzania). This collective approach mirrors calls for policy incentives and cost-sharing mechanisms to relieve financial burdens. Furthermore, 66% of surveyed companies (59% in Kenya, 73% in Uganda, and 68% in Tanzania) cited investment in infrastructure upgrades, such as processing and storage facilities. This finding aligns with our earlier results on the demand for loans and grants to modernize cold chains and production lines.

Finally, 61% recognized strengthening internal management and quality control systems as essential (51% in Kenya, 73% in Uganda, and 60% in Tanzania), with Uganda again leading the way. Robust internal systems are crucial for certification readiness and consistent product quality, as reflected in the 69% seeking technical assistance in quality control.

Table 51: *Country-level analysis of the proportion of surveyed companies reporting potential opportunities that they could leverage to grow in the organic market*

Question	Priority area	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
$f8 Which areas would you prioritize to overcome challenges and enhance competitiveness in the organic market? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)	Seeking external support for better market intelligence and buyer linkages	57%	85%	72%	**71%**
	Improving marketing and branding strategies to differentiate organic products	62%	70%	80%	**69%**
	Reducing certification and compliance costs through collective certification or group schemes	54%	73%	80%	**67%**
	Investing in infrastructure upgrades e.g., storage, processing facilities	59%	73%	68%	**66%**
	Strengthening internal management and quality control systems	51%	73%	60%	**61%**
	Other	0%	3%	0%	**1%**
	Total	**100%**	**100%**	**100%**	**100%**

3.7.4 Supportiveness of national policy and regulatory environments

Surveyed companies rated their national policy frameworks as only somewhat supportive, with significant room for improvement (**Figure 30**). Overall, 57% of the 95 respondents reported that basic guidelines exist, but many gaps remain; 20% found policies unclear, restrictive or absent; 8% considered the environment moderately supportive, with some incentives and partial alignment to international standards, 7% viewed it as very supportive, with clear policies, incentives and global best-practice alignment and 7% were unsure.

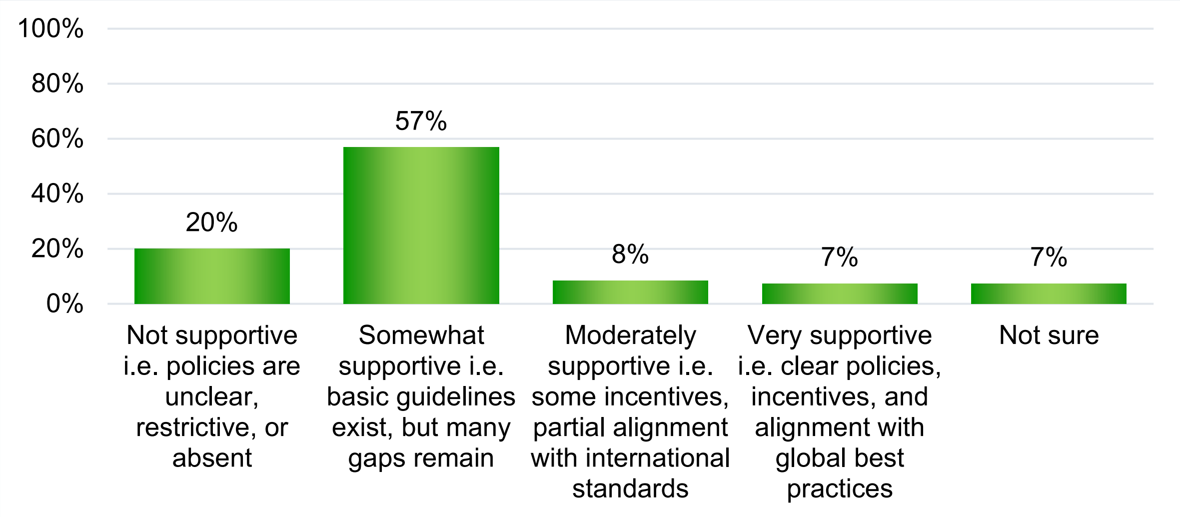

Figure 30: *Proportion of surveyed companies reporting how supportive the current national policy and regulatory environment is for organic trade*

Across the three countries (**Table 52**), Ugandan companies expressed the highest confidence in policy support (18% moderately or very supportive combined). At the same time, Tanzanian firms showed the most significant pessimism, with no respondents deeming the policy very supportive and 16% labelling it unsupportive.

Specifically, in Kenya, 43% of respondents found the policy environment somewhat supportive, while 35% deemed it unclear or restrictive. Another 8% rated it as moderately supportive, 8% as very supportive, and 5% were unsure. In Uganda, 64% reported that basic guidelines were in place but identified significant gaps. Only 6% judged the environment as unsupportive, 6% rated it as moderately supportive, 12% as very supportive, and 12% were unsure. Tanzanian companies were most critical: 68% described policies as basic yet incomplete, 16% found them unsupportive, 12% rated them moderately supportive, none viewed them as very supportive, and 4% were unsure.

Thus, the dominant view, 57% seeing only basic guidelines, highlights an urgent need for policy refinement, clearer regulatory frameworks and more substantial alignment with international benchmarks.

Table 52: *Country-level analysis of the surveyed companies reporting how supportive the current national policy and regulatory environment is for organic trade*

Question	**Category**	**s3. Country of operation.**		
		Kenya (n=37)	**Uganda (n=33)**	**Tanzania (n=25)**
f4. How supportive is the current national policy and regulatory environment for organic trade?	Not supportive i.e. policies are unclear, restrictive, or absent	35%	6%	16%
	Somewhat supportive i.e. basic guidelines exist, but many gaps remain	43%	64%	68%
	Moderately supportive i.e. some incentives, partial alignment with international standards	8%	6%	12%
	Very supportive i.e. clear policies, incentives, and alignment with global best practices	8%	12%	0%
	Not sure	5%	12%	4%

	Total	**100%**	**100%**	**100%**

3.7.5 Impact of trade agreements on organic exports

Study findings reveal that regional and international trade frameworks play a mixed role in the export strategies of the surveyed companies (**Table 53**). Overall, 48% of the 95 respondents reported that agreements such as the EAC protocols and AfCFTA offered some export opportunities, though their firms did not fully leverage these. Meanwhile, 13% felt that such agreements either had no influence or created more barriers and complex rules that hindered exports, while 11% recognized significant cost-reducing and market-expanding benefits. A further 16% were uncertain or unaware of any impact.

In Kenya, 51% reported that trade agreements provided some opportunities but remained underutilized, 14% experienced no influence at all, 16% found the rules more burdensome, 8% saw significant benefits, and 11% were unsure. Ugandan firms mirrored this cautious optimism: 48% identified a partial opportunity, 15% were unaware of any impact, 12% perceived added complexity, 9% reported significant gains, and 15% felt no influence. In Tanzania, 44% acknowledged some untapped opportunities, 8% reported no effect, 8% noted increased barriers, 16% benefited greatly, and a higher 24% were unsure.

Table 53: *Country-level analysis of the surveyed companies reporting the extent to which regional trade agreements (e.g., EAC agreements, AfCFTA) or international trade frameworks help or hinder their organic trade activities*

Question	Category	s3. Country of operation.			Total (n=95)
		Kenya (n=37)	Uganda (n=33)	Tanzania (n=25)	
f5. To what extent do regional trade agreements (e.g., EAC agreements, AfCFTA) or international trade frameworks help or hinder your company's organic trade activities?	They do not influence our activities at all	14%	15%	8%	**13%**
	They create more barriers or complex rules, making export difficult	16%	12%	8%	**13%**
	They provide some opportunities but are not fully leveraged by our company	51%	48%	44%	**48%**
	They offer significant opportunities to expand market reach and reduce costs	8%	9%	16%	**11%**
	Not sure or not aware of any impact	11%	15%	24%	**16%**
	Total	**100%**	**100%**	**100%**	**100%**

These results highlight that while nearly half of all companies recognize the potential benefits of trade agreements, actual utilization remains limited. The small share benefiting significantly suggests that many firms lack awareness, capacity or resources to navigate preferential tariffs, rules of origin[81] and simplified procedures. The uncertainty expressed by 16% overall, and

[81] Rules of origin (ROO) are the criteria used to determine the "economic nationality" of a product, essentially defining where it was produced or manufactured

24% in Tanzania, indicates a need for more explicit guidance and capacity-building on how to effectively leverage these frameworks to reduce export costs and access new markets.

Key informants across the three countries highlighted how trade frameworks, domestic policies, and infrastructure gaps shape the prospects of organic exporters. In Tanzania, the TOAM official highlighted several favourable trends, including rising global demand for organic products, increasing health and environmental awareness, and supportive regional trade agreements that bring new opportunities. According to the official, urban middle classes drive the domestic demand for chemical-free foods, while government and NGO initiatives promote sustainable agricultural practices. On the export front, the key informant noted that Tanzanian coffee, spices, cocoa, and horticulture benefit from preferential access under the EU's Everything But Arms scheme and the newly launched AfCFTA, which opens markets in Europe, the U.S., and East Africa.

> *"In Tanzania, organic companies have significant opportunities for growth due to rising global demand for organic products, increasing health and environmental awareness, and supportive regional trade agreements. Locally, urbanization and a growing middle class are driving demand for healthier, chemical-free food, while government and NGO initiatives promote sustainable agriculture. In export markets, Tanzania's organic coffee, spices, cocoa, and horticultural products are gaining attraction in Europe, the U.S., and East Africa under preferential trade agreements like the EU's Everything But Arms (EBA) initiative. The Africa Continental Free Trade Area (AfCFTA) also opens new regional markets."*

Official, Tanzania Organic Agriculture Movement (TOAM)

By contrast, a KOAN official in Kenya highlighted persistent trade barriers, mainly due to regulatory contradictions, which hamper farmers' ability to obtain compliant inputs, erode the integrity of organic standards, and limit the scale of Kenya's export channel.

> *"Trade barriers prominent in limiting regional or international export opportunities for organic products are mainly sourcing of raw materials and compliance. In addition, policies on supplying farmers with farm inputs especially subsidized fertilizers and the one that allow use of GMOs lack clarity or conflict with organic trade. Still there is no organic policies in place though the agro-ecology policy is in place but not being implemented."*

Official, Kenya Organic Agriculture Network (KOAN)

In Uganda, key informants called for targeted policy interventions to translate export-led growth strategies from paper into practice. They urged the government to build value-chain-specific infrastructure, freezing storage and handling facilities, by tailoring solutions to each commodity's unique export challenges.

> *"I think for some of these products that are getting exported, what needs to be done is, whereas Uganda's strategy now has been export-led growth, I think the strategy has majorly been on paper. The strategy has not translated into real functional supportive infrastructure that would support that export-led growth. So, I think the government has a number of changes that can be done within the policy to set up systems that support the movement and the handling of some of these foods as they get exported. One of the things that we do that can be able to strengthen that would be to address different value*

> *chains on their own, because each value chain has its own export challenges which are different, so we need to be able to identify them and provide sustainable solutions for some of those challenges. Also, addressing the issue of the cold storage value chain aspects is one of those that the government has been trying to do for the last 10 years or so. Now that there are some new developments, I think we'll be having a very good system for the support companies that are actually exporting their products to foreign markets."*

KII, State Department official, Uganda

The above observations, therefore, call for clear guidelines on fertilizers, seeds and allowable technologies that align with organic standards, targeted value-chain infrastructure, leveraging trade agreements to actively use the available frameworks such as AfCFTA to reduce tariffs and expand market access, and policy focus on building the physical and institutional systems that support export readiness.

4.0 CONCLUSIONS AND RECOMMENDATIONS

Conclusions

Objective 1: Identify at least 60 companies (20 in each country), their enterprise, and the services they are involved in.

a) **Young, integrated organic sector:** Study results reveal an organic market comprising young firms (51% of surveyed firms have been operating for five years or less) and an integrated value chain at sector level, spanning from primary production through processing, marketing, and export. Furthermore, 74% (65% in Kenya, 76% in Uganda, and 84% in Tanzania) of these firms already practice exclusively organic methods, and 56% (49% in Kenya, 55% in Uganda, and 68% in Tanzania) are formally organized as limited liability companies (LLCs), demonstrating both a strong commitment and organizational capacity to support further scaling under EAOPS.

b) **Emerging export potential and local market strength:** While 78% (78% in Kenya, 88% in Uganda, and 64% in Tanzania) of companies serve local community markets, more than half (55% overall: 38% in Kenya, 61% in Uganda, and 72% in Tanzania) reach national buyers and almost one-third (31% overall: 19% in Kenya, 39% in Uganda, and 36% in Tanzania) trade regionally or internationally. Mature firms (10+ years) are leading this outward expansion, with 59% (32% in Kenya, 73% in Uganda, and 80% in Tanzania) exporting beyond East Africa, supported by diversified distribution channels, including a growing e-commerce via courier services. These findings present an opportunity to leverage the existing local dominance of companies and integrated operations to improve their access to regional and global organic trade.

Objective 2: Document the stage of growth and development of the companies in terms of outputs, spatial coverage, personnel, and infrastructure development.

a) **Robust growth trajectory with clear export ambitions:** Survey findings demonstrate that the organic sector comprises a dynamic mix of companies at every stage of growth, ranging from 22% in start-ups to 20% in active expansion and 2% in full maturity. Across Kenya, Uganda, and Tanzania, a strong pipeline exists for future organic exports, with 55% of firms planning to enter organic export markets and 59% intending to expand their regional or international reach over the next 2–5 years. This intention among companies to increase exports regionally and internationally, particularly in Tanzania (84%) compared to Kenya (43%) and Uganda (58%), demonstrates the sector's preparedness to leverage its integrated value chains for growth.

b) **Operational gaps exist:** Despite high organic adoption, with 40% (41% in Kenya, 36% in Uganda, and 44% in Tanzania) of firms deriving over 75% of their output from organic production and nearly universal intentions among companies to invest in infrastructure (only 3% have no plans to invest in infrastructure while 27% have clear budgets and plans and 69% will invest conditionally), critical capacity constraints persist. Over half of companies (55% overall: 57% in Kenya, 52% in Uganda, and 56% in Tanzania) rely on basic, manual facilities, 55% (46% in Kenya, 70% in Uganda, and 48% in Tanzania) require significant adjustments to align with EAOPS, and 45% (41% in Kenya, 45% in Uganda, and 52% in Tanzania) of workforces have minimal organic training. Translating growth expectations (61% forecast significant expansion) into reality will depend on targeted upgrades in processing, storage, traceability, and workforce development, supported by tailored financing and technical assistance.

Objective 3: Identify scope, benefits, and contributions the companies are making to the local and national economy.

a) **Organic companies play a major role in local employment and the economy:** Over the past three years, 78% (78% in Kenya, 67% in Uganda, and 92% in Tanzania) of firms expanded their workforces, most notably in Tanzania and among mid-career companies, while 49% of all hires originated within a 50 km radius. Local hiring supports livelihoods, generates tax revenues and stimulates community development.
b) **Despite modest revenue scales, businesses are planning strategic investments with broader economic impact:** Although most firms remain micro to medium-sized, 79% (78% in Kenya, 76% in Uganda, and 84% in Tanzania) reported revenue increases, and 26% (24% in Kenya, 27% in Uganda, and 28% in Tanzania) now derive over 75% of their turnover from organic growth. Furthermore, 35% (35% in Kenya, 36% in Uganda, and 32% in Tanzania) plan new market expansion, 20% (Kenya (8%), Uganda (27%), Tanzania (28%) focus on certification for premium pricing, and invest in local sourcing of the workforce and training them; the sector will further contribute to the national GDP and export earnings.

Objective 4: Identify the export readiness of the companies – does the company have sufficient production capacity that can be committed to the export market?

a) **Moderate production capacity but limited scalability without investment:** While a considerable proportion of surveyed companies (52% overall: 59% in Kenya, 45% in Uganda, and 48% in Tanzania) reported moderate baseline production levels of 10—100 metric tonnes (MT), 37% (38% in Kenya, 36% in Uganda and in Tanzania) produce under 10 MT and only 12% (3% in Kenya, 18% in Uganda, and 16% in Tanzania) exceed 100 MT annually, few possess the internal resources to expand for export: just 15% (8% in Kenya, 18% in Uganda, and 20% in Tanzania) can scale output by more than 50% using existing assets, and 17% (22% in Kenya, 21% in Uganda, and 4% in Tanzania) require significant new investment to grow at all. Production volumes also correlate with firm age, with mature companies four times more likely to exceed 100 MT than startups. This observation means that younger companies will struggle to meet regional and international demand without targeted financing (access to finance) and infrastructure (necessary machinery) support.
b) **Strong export intent hampered by certification, quality, and logistics gaps:** With 73% (57% in Kenya, 85% in Uganda, and 80% in Tanzania) planning to secure organic certifications within 12 months and 71% (73% in Kenya, 70% in Uganda, and 68% in Tanzania) willing to invest in infrastructure meeting export requirements if provided with support, surveyed companies demonstrated a strong commitment to export readiness. However, critical gaps remain. Only 15% (22% in Kenya, 9% in Uganda, and 12% in Tanzania) are fully compliant with international quality standards (such as USDA National Organic Program (NOP), EU Organic Regulation (EC 834/2007 & EC 889/2008) etc), 57% lack any cold-chain capacity, and just 6% (8% in Kenya, 6% in Uganda, and 4% in Tanzania) benefit from highly efficient logistics. Furthermore, only 14% of the companies hold binding export contracts, with a majority relying on informal commitments. Addressing

these deficiencies, particularly in infrastructure, logistics and certification, will be essential in translating export readiness into tangible market access.

Objective 5: Document the extent to which the companies are utilizing the EAOPS standard and other organic standards.

a) **Robust certification pipeline despite persistent uptake barriers:** Although only 22% (16% in Kenya, 18% in Uganda, and 36% in Tanzania) of companies currently hold organic certification and only 6% (6% in Kenya, none in Uganda and 16% in Tanzania) are EAOPS-certified, a near-universal proportion of uncertified firms (94% overall: (92% in Kenya, 86% in Uganda, and 100% in Tanzania) plan to formalize their credentials within three years, thus demonstrating a sector-wide commitment to meeting regional and international standards. However, high certification costs, complex traceability and auditing requirements, and uneven awareness of EAOPS, particularly in Kenya and Uganda, continue to impede uptake, highlighting the need for targeted financial incentives, audit support, and awareness-raising initiatives.

b) **Certification success depends on documentation and strategic standard additions:** Audit outcomes and documentation are closely linked to compliance levels: 58% (50% in Kenya and Uganda, and 67% in Tanzania) of certified companies achieved full or near-full compliance, correlating with 62% (50% in Kenya, and 67% in Uganda and Tanzania) reporting comprehensive record-keeping. At the same time, 20% (8% in Kenya, 17% in Uganda, and 31% in Tanzania) of firms aware of the EAOPS plan to acquire additional international certifications (e.g., EU Organic, USDA NOP) in addition to their initial regional accreditation. Continuous capacity building in documentation, traceability, and management of multiple standards will, therefore, be critical to enhancing the sector's export readiness.

Objective 6: Identify challenges (including trade barriers) and opportunities that these companies face.

a) **Persistent external barriers continue to constrain organic exporters:** Companies in the organic sector face several challenges including unreliable market data (67% overall: 73% in Kenya, 70% in Uganda, and 56% in Tanzania), weak policy incentives (60% overall: 54% in Kenya, 67% in Uganda, and 60% in Tanzania), limited export finance (60% overall: 38% in Kenya, 82% in Uganda, and 60% in Tanzania), logistics deficits (53% overall: 51% in Kenya, 52% in Uganda, and 56% in Tanzania), and complex regulatory and customs procedures (49% overall: 49% in Kenya, 64% in Uganda, and 32% in Tanzania). Better market intelligence data, dedicated financing mechanisms, and trade policy initiatives will help address these hurdles.

b) **Companies have specific growth strategies and priorities, with clear areas of collaboration**: A majority of companies (65% overall: Kenya (62%), Uganda (70%)) plan to diversify into value-added products and tap premium, health-focused niches, while 61% identify digital traceability and e-commerce as growth enablers. To capitalise on these opportunities and boost competitiveness, firms prioritise securing external support for market intelligence linkages (71% overall: (Kenya (57%), Uganda (85%), Tanzania (72%)), improved branding and marketing (69% overall: Kenya (62%), Uganda (70%), Tanzania (80%)), collective certification schemes to address costs (67%), infrastructure upgrades (66% overall: (Kenya (54%), Uganda (73%), Tanzania (80%)), and robust management and quality systems (61% overall: Kenya (51%), Uganda (73%), Tanzania (60%)). These plans must be complemented with policy advocacy efforts and alignment of regulations with global standards.

Recommendations

Objective 1: Identify at least 60 companies (20 in each country), their enterprise, and the services they are involved in.

1) Leverage the study's database of 60 purposively sampled companies to prepare and maintain a publicly accessible registry managed by the NOAMs that captures important firm metrics such as legal status, primary activities and value chain roles, product specializations and production volumes, market reach, and distribution channels. This centralized and regularly updated database will help BvAT with critical intelligence, including tracking compliance, supporting targeted incentives, and matching buyers with suitable suppliers across Kenya, Uganda, and Tanzania.
2) Design support packages aligned with the heterogeneous needs of the firms revealed by the study. For example, for young firms (1–5 years, accounting for 51% of surveyed firms), fast-track technical assistance in basic infrastructure (cold chain, storage), digital traceability, and cooperative certification schemes to help them scale beyond their reported production volumes (sub-10 MT outputs). For hybrid and transitioning firms (23%), provide targeted capacity-building programs and grant support aimed at converting conventional operations to full organic compliance, including facility upgrades. For mature, export-ready firms (those over 10 years old, accounting for 18% of firms), provide capacity-building in export marketing, advanced quality management systems, and design grant-matching packages for value-added processing lines to strengthen their demonstrated strengths in regional (31%) and international (28%) trade.
3) Capitalize on the sector's integrated, multi-role structure (59 % producers, 66 % processors, 51 % marketing, 31 % support services) to cluster firms into export groups comprising, say, producers, processors and logistic providers to share services such as courier and cold-chain, negotiate collective costs such as shipping rates and secure bulk contracts. In addition, develop an e-platform in partnership with key sector players, such as the NOAMs and regulatory country agencies, where registered firms can showcase certified products, post real-time production volumes, and transact with buyers.
4) To promote EAOPS awareness and East African organics at trade fairs and online marketplaces, such as the proposed e-platform, create branding initiatives at the country and regional levels, leveraging EAOPS compliance. These activities will enhance the visibility of EAOPS as an organic standard, reduce individual firm costs, and ensure sustained market access and premium pricing.

Objective 2: Document the stage of growth and development of the companies in terms of outputs, spatial coverage, personnel, and infrastructure development.

1) Companies span a range from 22% startups to only 2% mature, with 46% in early growth and 20% in expansion. Thus, each stage has distinct needs, with startups requiring market-entry support, early-growth firms needing scaling guidance, and expansion-mode companies benefiting from export support. Thus, for startups (0-3 years), provide streamlined access to shared co-working spaces, especially for firms geographically

proximate, basic processing equipment, and one-on-one coaching on organic market entry, lean operations, and entry-level certification steps. For early-growth firms (3–7 years), support them with workshops on product diversification, buyer linkage services, and conditional micro-grants to boost production from the reported 26–50 MT to export-scale volumes. For export-ready firms (7–10 years), provide intensive capacity building in quality control systems, advanced traceability platforms, and contract negotiation. Additionally, facilitate the participation of this cohort of firms in regional trade fairs and establish B2B matchmaking pipelines to convert 59% of planned exports into binding contracts.

2) Infrastructure remains basic for 55 % of firms, only 12 % are fully EAOPS-aligned, and 69% plan conditional investments pending funding. Meanwhile, 73 % intend to certify within 12 months, yet face high costs and facility gaps. Thus, aim to provide conditional grants aimed at underwriting a considerable proportion of costs towards cold storage facilities, processing lines and traceability-system costs. These disbursements could be tied to tangible milestones such as completing an EAOPS pre-audit. Additionally, pool the selected companies into group-audit schemes that secure volume discounts on EAOPS and other additional third-party certifications, reducing per-firm fees and smoothing the path for the 73 % planning to certify.
3) With only 1–25% of company staff versed in organic practices, and key informants rating their knowledge at 3/10, surveyed firms' workforce training is minimal. Thus, ongoing refresher courses are needed to sustain record-keeping, internal audits, and quality-control. This proposal could be achieved through e-learning and field workshops covering practical modules on EAOPS criteria, traceability, internal auditing and record maintenance.

Objective 3: Identify scope, benefits, and contributions the companies are making to the local and national economy.

1) To strengthen local workforce and further contribute to local economies, BvAT should consider partnering with vocational institutes and NOAMs to launch organic-agriculture apprenticeship and curricula tailored to enhancing local skills on processing, quality control, and traceability, ensuring a steady pipeline of qualified local talent.
2) Approximately 59% of companies reported slight revenue increases and 20% significant gains over three years while 26% already derive >75 % of turnover from organics. Yet half of firms remain at micro-scale revenues. Further, approximately 35% plan market expansion, and 20% plan increased certification for premium access. Thus, it is critical to create subsidized certification vouchers covering, say up to 50% of the cost for EAOPS audits, enabling firms to secure premium pricing and increase their organic-revenue share. Additionally, consider providing matching grants or wage-subsidies for firms that commit to sourcing ≥75% of new hires locally, enhancing community income and strengthening farm-to-factory linkages.
3) Beyond jobs and revenues, firms plan local-input sourcing (12 %), workforce training (8 %) and community development (11 %). These strategies enhance social impact and reinforce long-term supply-chain resilience. It is therefore important to incentivize firms that procure, say more than 30 % of inputs (e.g., seeds, compost) from certified smallholder groups within 50 km, with low-interest finance or work with the central governments to offer tax breaks to these farmers.

Objective 4: Identify the export readiness of the companies – does the company have sufficient production capacity that can be committed to the export market?

1) To enhance export readiness of the selected firms, provide matching finance or low interest loans for mechanization (dryers, threshers), cold-storage and processing lines, so firms producing less than 50 MT can expand beyond 100 MT. Additionally, offer loan advances against letters of intent or binding contracts, turning 32% informal commitments into firm orders and enabling the 17% of firms currently constrained from scaling. Additionally, recognizing that 71 % of companies express conditional willingness to invest if external support is available, it will be critical to subsidize up to, say 70% of the upfront hardware and software costs, thus lowering the barrier to entry, and support the majority of firms ready to invest their own funds once support is guaranteed.
2) To address the issue of firms (57%) lacking any cold chain capacity, consider establishing regional cooperative export hubs that centralize cold rooms where small and mid-career producers consolidated into bulk shipment pools can tap into and reduce costs. Additionally, consider onsite services such pesticide, moisture and microbiological tests, to fast-track export-grade packaging and audit readiness. To further support this strategy, consider partnering with freight forwarders to negotiate preferred rates, real-time tracking, and customs brokerage services, cutting unpredictable lead times for the 24% of firms experiencing frequent delays.
3) Consider integrating certification, quality control & market linkages into a one-stop platform to ensure end-to-end certification support. Additionally, offer on-demand courses in internal audits, record-keeping, and non-conformance management to reduce the 14% major audit-failure rate and boost the 15% fully compliant share.

Objective 5: Document the extent to which the companies are utilizing the EAOPS standard and other organic standards.

1) **Launch a Regional "EAOPS Acceleration Fund" with Blended Finance and Group Schemes**
   Establish a pooled financing mechanism that specifically covers up to, say 70 % of EAOPS audit costs for the firms, with tiered contributions based on firm age and size to address the 75% of firms that cite audit fees as their primary barrier. Additionally, provide matching grants or low-interest loans for cold-chain, processing and traceability system investments, tackling the 68% of EAOPS-aware companies who lack compliant facilities. This strategy could also be used to incentivize cooperatives and value-chain clusters to pool resources and access volume discounts on both EAOPS and complementary international audits, thus reducing per-firm costs.
2) Consider rolling out a tiered EAOPS capacity-building program entailing a multi-level training and awareness initiative, designed for different audiences (startups, mid-career, mature firms). This program could adopt e-learning & workshop delivery methods covering EAOPS principles, record-keeping practices, social-standards audits, and audit-readiness self-assessments. Prioritize Kenya and Uganda, where 35%–33 % of firms remain unaware of EAOPS.
3) Provide standardized templates, SOP checklists, and a cloud-based traceability demo system to help the 29% of firms with minimal or partial records achieve comprehensive documentation benchmark. Also offer virtual and field-based advisory support to

troubleshoot gaps, reducing the 14% incidence of major non-conformities and the 19% of firms lacking recent audits.

4) Consider listing EAOPS-certified firms in priority organic export directories such as EAC, AfCFTA and international buyer portals, creating immediate demand-pull for the 89% of companies planning first-time EAOPS applications. To reinforce EAOPS standards market value and incentivize rapid uptake, ensure only firms with at least provisional EAOPS compliance attend targeted trade events. To boost credibility as indicated by 30% of firms citing buyer as their top motivation and aligning regional standardization with global market expectations, BvAT should consider partnering with e-traceability providers to embed EAOPS certification metadata in product labelling.

Policy recommendations

1) Persistent external barriers such as unreliable market data (67%), limited export finance (60%), and logistics deficits (53%), demand coordinated public-private action. Consider advocating for a regional Organic Market Observatory that compiles real-time export pricing, buyer requirements, and regulatory updates for East African organic firms. Complement this observatory with an export finance scheme in partnership with development banks, underwriting up to 70 percent of working-capital loans for certified exporters.
2) Consider negotiating for a dedicated, fast-track channel through customs, port handling, and courier hubs exclusively for EAOPS-certified organic goods. This negotiation with international courier companies, ocean freight lines and air-cargo carriers, port authorities and customs agencies could include seeking reduced-tariff cold-chain shipping rates for EAOPS-certified produce to ensure that strong export intent (73% seeking certification, 71% ready to invest) converts into reliable, cost-effective market access.
3) To bridge critical infrastructure and capacity gaps, consider advocating for governments in Kenya, Uganda and Tanzania to create a dedicated "export-readiness fund" that combines low-interest investment grants with hands-on technical support. Small and young organic companies (37% of which produce under 10 MT and 55% lacking cold-chain) could access matching-grant finance for processing upgrades, cold storage, traceability systems, and e-commerce logistics. A one-stop shop housed within each country's relevant agricultural agency would deploy agribusiness specialists to guide firms through equipment selection, construction, workforce training, and digital traceability roll-outs, ensuring planned infrastructure investments translate directly into export capacity.
4) With only 6 percent EAOPS-certified and 22% holding any organic seal, advocate for lowering financial and administrative barriers to accreditation. Governments in the three countries could co-finance audit and registration fees (e.g. 50% subsidy for first-time EAOPS applicants), establish a centralized audit pool to drive down per-firm costs, and offer tiered pre-packaged traceability toolkits. Simultaneously, roll out an EAOPS awareness campaign, partnering with the NOAMs, to deliver standardized training modules. These measures will accelerate certification pipelines and enable companies to leverage regional and premium markets.
5) Over and above aligning national organic regulations with EAOPS and key international standards and having in place plain-language compliance handbooks, consider establishing training series that equips exporters to navigate preferential tariffs, rules of origin, and phytosanitary protocols, thus closing the 40% non-tariff barrier and turning the

16% trade-agreement uncertainty into concrete market-access gains. The training series should involve customs authorities, agricultural extension services, and buyer associations to co-deliver.

ANNEX I: LISTS OF COMPANIES CATEGORIZED BY SECTOR & COUNTRY

To identify the sixteen companies in each country most in need of support to enhance their export readiness, the study harmonized ten export-readiness indicators (certification readiness (d4), compliance with international standards (d5), quality-control score (d6), cold storage capacity (d7), export packaging readiness (d8), transport & logistics reliability (d9), market knowledge (d10), export documentation experience (d11), export contracts readiness (d12), and willingness to invest in upgrades (d14)) and combined into a single, comparable score for every respondent. For each question, higher values indicated greater readiness. See the table below for further reference.

Table 54: *Survey questions used to assess export-readiness of all the 95 surveyed companies*

d4. Which statement best describes your company's readiness to obtain or upgrade certifications for export markets? (ONE ANSWER ONLY)

1 Not prepared to invest in certification at this time
2 Considering applying for EAOPS or other organic certifications within the next 12 months
3 In the process of obtaining new/updated certifications
4 Fully certified and current with all necessary export certifications

d5. Which of the following best describes your company's current compliance with international quality standards? (ONE ANSWER ONLY)

1 No compliance measures in place beyond basic domestic regulations
2 Partial compliance or working towards full compliance with international quality standards
3 Fully compliant with internationally recognized quality and safety standards
4 Exceeds standard compliance through continuous quality improvement initiatives

d6. Which quality control mechanisms does your company currently have in place? (MORE THAN ONE ANSWER ALLOWED) (SELECT ALL THAT APPLY)

0 None
1 Basic visual inspection
2 Testing for chemical residues, pathogens, or contaminants
3 Dedicated quality control staff and lab facilities
4 Traceability systems (batch coding, digital records)

d7. How would you describe your company's cold storage and post-harvest handling infrastructure? (ONE ANSWER ONLY)

1 No cold storage or specialized handling facilities
2 Limited cold storage capacity, suitable for small batches
3 Adequate cold storage and handling facilities meeting basic export requirements
4 Advanced cold chain infrastructure capable of handling large volumes consistently and maintaining strict quality standards

d8. How prepared is your company's packaging and labeling for export markets? (ONE ANSWER ONLY)

1 Basic packaging with no specialized export labeling
2 Packaging that meets domestic standards but not fully adapted for export market requirements
3 Packaging and labeling designed to meet targeted export market regulations (e.g., organic logos, language requirements)
4 High-quality, market-specific packaging and labeling that aligns with multiple international standards

d9. Which statement best describes your company's access to efficient transport and logistics solutions? (ONE ANSWER ONLY)

1 Long and unpredictable lead times with frequent delays
2 Moderate lead times with occasional delays

3 Generally reliable supply chain with predictable lead times
4 Highly efficient and reliable supply chain with minimal delays

d10. How would you describe your company's knowledge of its target export markets? (ONE ANSWER ONLY)

1 No knowledge or research on export markets
2 Some preliminary research but limited market intelligence
3 Moderate understanding of target markets (customer preferences, competition, pricing)
4 In-depth market knowledge supported by research, buyer feedback, or previous export experience

d11. How would you describe your company's experience with export documentation and customs procedures? (ONE ANSWER ONLY)

1 No experience; unfamiliar with export documentation requirements
2 Limited experience; some staff have knowledge of basic export procedures
3 Moderate experience; able to handle typical documentation and customs clearance
4 Extensive experience; streamlined processes for export compliance and documentation

d12. Which of the following best describes your company's existing export contracts? (ONE ANSWER ONLY)

1 Informal agreements or verbal commitments from buyers
2 Formal letters of intent from potential buyers
3 Existing contractual agreements with regular international customers
4 No informal or formal agreements so far

d14. How willing is your company to invest in upgrading its infrastructure to meet export requirements? (ONE ANSWER ONLY)

1 Not willing at this time
2 Possibly, if external support or financing is available
3 Likely to invest in incremental improvements (e.g., cold storage, packaging)
4 Already investing or prepared to invest in significant upgrades

The study then computed an aggregate export readiness score by summing the ten scores for each indicator (question), yielding a single score per company, ranging from 9 (least ready) to 43 (most ready). To compare companies fairly across Kenya, Uganda and Tanzania, the study then ranked all firms within each country, with rank 1 for the highest-scoring (most ready) firm and rank 2 for the next, and so on. Finally, to identify companies most in need of assistance, the study flagged the 16 lowest-ranked companies in each country as priority candidates for support.

Table 55: Computed aggregate export readiness score for all the surveyed 95 companies

Name of Company.	Export readiness indicators										S1. Aggregate Export Readiness Score (9—43)	Export readiness rank within country (1 = most ready)	Country of operation	Selected Company (Rank 1—16)
	Certification readiness (1—4)	Compliance with quality standards (1—4)	Quality control mechanism score (0—7)	Cold storage capacity (1—4)	Export packaging readiness (1—4)	Transport & logistics (1—4)	Market knowledge (1—4)	Export documentation experience (1—4)	Corrected export contract readiness (1—4)	Willingness to invest in upgrades (1—4)				
BUNYALA AGR INDUSTRIAL PARK LIMTED	1	1	0	1	1	1	1	1	1	3	11	37.0	Kenya	1
GOOD TIMES FARM	2	1	0	1	1	1	2	1	1	2	12	35.5	Kenya	2
SOIL DOCTORS LIMITED	1	1	1	1	2	1	1	1	1	2	12	35.5	Kenya	3
SHAMIPO INVESTMENTS	2	1	0	1	2	2	1	1	1	2	13	34.0	Kenya	4
KOFAR KENYA LTD	2	1	1	1	2	1	2	1	1	2	14	32.5	Kenya	5
MESHEDDY POULTRY FARM VISION	1	1	1	1	1	2	2	1	2	2	14	32.5	Kenya	6
BASECAMP ENGINEERING	2	2	0	1	1	1	1	3	2	2	15	29.5	Kenya	7
INFINITE ORGANIC SOLUTIONS HUB	2	1	2	1	2	2	1	1	1	2	15	29.5	Kenya	8
FARM SHARE KENYA LTD	2	2	1	1	1	2	2	1	1	2	15	29.5	Kenya	9
NECTRKRIP COMPANY LIMITED	2	1	0	1	1	4	2	1	1	2	15	29.5	Kenya	10
UTAWALA FARM	2	2	0	1	1	2	3	1	2	2	16	26.0	Kenya	11
CITYHUB CONSULTING SERVICES	2	2	1	1	1	2	2	2	1	2	16	26.0	Kenya	12
CAMLPO LIMITED	2	1	1	2	2	2	2	1	1	2	16	26.0	Kenya	13
TUMAINI GARDENS LIMITED	1	4	1	2	1	4	1	1	1	1	17	22.5	Kenya	14
PAT ORGANIX LIMITED	2	1	3	1	1	2	2	1	2	2	17	22.5	Kenya	15
FORKEL FARM AFRICA LIMITED	2	1	1	1	2	3	2	1	2	2	17	22.5	Kenya	16
KITUI MULTI PROCESSORS LIMITED	2	3	2	1	1	1	1	1	3	2	17	22.5	Kenya	
EXCELCIOUS FARM ENTERPRISE	2	2	0	2	2	1	2	2	2	3	18	20.0	Kenya	
BERMAL ENTERPRISE	3	2	1	1	1	2	2	2	3	2	19	18.0	Kenya	

FARMFIX AFRICA	1	1	3	1	1	2	3	2	2	3	19	18.0	Kenya	
AHAVA ORGANICS LIMITED	1	2	1	1	3	1	2	3	3	2	19	18.0	Kenya	
ECOFERT SOLUTIONS	2	2	1	2	2	2	2	2	3	2	20	14.5	Kenya	
GREEN HEALTH ORGANIZATION	2	2	3	1	2	2	3	1	2	2	20	14.5	Kenya	
TOOTHPICK COMPANY LIMITED	1	3	2	3	2	3	1	2	1	2	20	14.5	Kenya	
BIO VISION AFRICAN TRUST	3	2	1	2	2	1	2	2	3	2	20	14.5	Kenya	
MICHAEL RUCHU ORGANIC FARM	3	2	1	2	2	1	3	2	3	2	21	11.0	Kenya	
FINE AROMAS OF KENYA COMPANY LIMITED	3	3	1	2	1	2	2	2	2	3	21	11.0	Kenya	
SYDSEL AFRICA	2	2	1	1	2	3	2	3	3	2	21	11.0	Kenya	
NYANGORORA BANANA PROCESSORS LIMITED	2	2	2	2	2	2	3	2	3	2	22	7.5	Kenya	
INDIVIDUAL	1	2	2	3	2	1	3	3	3	2	22	7.5	Kenya	
CLIFFAGROBIZ	3	2	1	2	2	2	2	3	3	2	22	7.5	Kenya	
TOOTHPICK COMPANY LIMITED	2	3	2	3	2	3	2	2	1	2	22	7.5	Kenya	
SPRINGS OF HOPE	3	3	2	3	1	4	3	3	1	3	26	5.0	Kenya	
GLOBAL CLIMATE CHANGE & HEALTH ASSOCIATION OF KENYA	2	2	7	3	2	3	3	2	3	3	30	4.0	Kenya	
SAKURI FARMERS COOPERATIVE SOCIETY LTD	2	3	3	4	3	3	3	3	4	3	31	3.0	Kenya	
BAYER EA	4	3	2	4	3	3	4	4	4	3	34	2.0	Kenya	
KENYA AGRICULTURAL & LIVESTOCK RESEARCH ORGANIZATION	4	3	7	1	2	3	4	4	4	3	35	1.0	Kenya	
AGRO MAX	2	1	1	1	1	1	1	1	1	2	12	33.0	Uganda	1
FRESHVEGGIES PGS	2	1	1	1	1	2	1	1	2	1	13	32.0	Uganda	2
R&G INVESTMENTS LIMITED	2	1	1	2	1	1	2	1	1	2	14	31.0	Uganda	3
HAKYOOGO VILLAGE NATURE SERVICES	2	1	1	2	1	1	2	2	1	3	16	28.5	Uganda	4
NECOFAM	2	1	1	2	2	2	2	1	1	2	16	28.5	Uganda	5
REAPERS GROUP OF COMPANY	2	2	2	1	2	1	1	1	2	2	16	28.5	Uganda	6

KASENGE RIVERFORD ORGANIC AGRICULTURAL CENTER	3	2	1	1	1	1	2	1	2	2	16	28.5	Uganda	7
AFRI SOKO CONNECT	2	2	1	1	3	2	2	2	2	2	19	25.0	Uganda	8
BANYAKINKIIZI COFFEE PRODUCERS & PROCESSORS CO-OPERATIVE SOCIETY LTD	2	2	1	2	1	3	3	1	2	2	19	25.0	Uganda	9
MEMAGO AGROECOLOGY VENTURES UGANDA LTD	2	2	1	2	3	2	3	1	1	2	19	25.0	Uganda	10
WESTERN SILK ROAD LIMITED	2	2	5	2	2	1	2	1	1	2	20	21.5	Uganda	11
MOHCA BEAUTY & SKINCARE LTD	2	2	2	1	2	2	2	3	2	2	20	21.5	Uganda	12
TOPA ORGANIC UGANDA	2	2	1	2	2	2	2	2	3	2	20	21.5	Uganda	13
MAKONDE ORGANIC (U) LTD	2	3	5	1	2	1	2	2	1	2	21	18.5	Uganda	14
PATIENCE PAYS INITIATIVE	2	2	1	1	3	4	3	1	1	3	21	18.5	Uganda	15
FOUR ACRE MODEL AGRO ORGANIC FARMERS ASSOCIATION	3	2	2	1	2	3	2	2	3	2	22	15.5	Uganda	16
BARISTA HOUSE LTD	2	2	1	2	2	3	2	2	3	3	22	15.5	Uganda	
DIANA AGRO PRODUCTS	2	2	4	2	2	2	3	1	2	2	22	15.5	Uganda	
DIANA PRODUCTS	2	2	4	2	2	2	3	1	2	2	22	15.5	Uganda	
KIPEKEE SOLUTIONS LTD	2	2	3	3	2	2	2	2	2	3	23	12.0	Uganda	
LAMALO AGRIBUSINESS COMPANY LIMITED	2	1	7	2	2	1	2	1	3	2	23	12.0	Uganda	
JEROMA FARMERS COLLECTION CENTRE LIMITED	2	2	4	2	2	2	3	2	2	2	23	12.0	Uganda	
SAGE UGANDA	2	2	7	1	1	2	3	2	2	2	24	10.0	Uganda	
PATIENCE PAYS HEALTHY FOODS	2	2	2	1	3	4	4	1	4	2	25	8.5	Uganda	
BUKONZO ORGANIC FARMERS COOPERATIVE UNION	2	3	2	1	3	2	3	3	4	2	25	8.5	Uganda	
JEROMA FARMERS COLLECTION CENTER LIMITED	2	2	7	3	2	2	2	2	3	3	28	6.5	Uganda	
PATIENCE PAYS INITIATIVE	2	4	1	1	4	3	3	3	4	3	28	6.5	Uganda	

BATA AKAC-PE CHIA SEED PRODUCERS & EXPORTERS COOPERATIVE SOCIETY	2	2	7	1	3	3	3	2	3	3	29	5.0	Uganda	
BATA PRODUCERS AND EXPORTERS CO-OPERATIVE-DOKOLO	2	2	7	1	3	3	3	3	3	4	31	4.0	Uganda	
MUKWANO INDUSTRIES UGANDA LIMITED	3	3	7	3	3	2	3	3	3	3	33	2.0	Uganda	
MOUNT ELGON COFFEE AND HONEY CO-OP	4	4	7	1	3	2	3	3	4	2	33	2.0	Uganda	
OUTSPAN AGRIC EXPORTS LIMITED	3	2	7	2	3	3	3	4	4	2	33	2.0	Uganda	
LISHE360 LIMITED	1	1	1	1	1	2	1	1	1	2	12	25.0	Tanzania	1
WISDOM GROUP OF PRODUCTS ENTERPRISES	2	1	0	1	1	2	1	2	2	2	14	23.5	Tanzania	2
ECOSISTAIN TANZANIA LTD	2	1	1	1	1	1	2	1	2	2	14	23.5	Tanzania	3
SERENGETI MEMORIAL INDUSTRIES COMPANY LTD	2	1	2	1	1	1	1	1	3	2	15	22.0	Tanzania	4
MSONGE ORGANIC FAMILY FARM	2	3	1	1	1	1	1	2	2	2	16	20.0	Tanzania	5
AFRICA HARVEST ENTERPRISES (T) LIMITED	2	2	1	1	2	2	1	1	2	2	16	20.0	Tanzania	6
UPENDO GROUP	2	2	2	2	1	1	2	1	1	2	16	20.0	Tanzania	7
CORAL TREE LTD	2	2	1	2	1	2	1	1	2	3	17	18.0	Tanzania	8
GLEN AFRICA LIMITED	2	2	1	2	2	3	2	1	1	2	18	16.0	Tanzania	9
AFRO NATURE COMPANY LIMITED	2	1	1	1	1	2	3	2	2	3	18	16.0	Tanzania	10
HIGHLANDS ORGANIC COMPANY	3	1	2	1	2	3	2	2	2	2	20	13.5	Tanzania	11
NATURERIPE KILIMANJARO LIMITED	2	2	3	2	2	3	2	2	2	2	22	11.0	Tanzania	12
ASILI AGRI CENTER	2	2	2	1	3	3	2	1	3	3	22	11.0	Tanzania	13
KOFIK ENTERPRISE	3	2	1	1	2	3	3	4	1	2	22	11.0	Tanzania	14
VEGRAB ORGANIC FARMING LTD	2	2	5	1	2	2	2	2	3	2	23	8.5	Tanzania	15
ORGANIC HILL FARMING COMPANY LIMITED	2	3	1	1	1	3	4	3	3	2	23	8.5	Tanzania	16

LINDIVIDA TANZANIA LIMITED	3	2	3	1	3	2	3	3	3	2	25	6.5	Tanzania	
ANISIA GROUP COMPANY LIMITED	2	1	1	1	3	3	4	4	4	2	25	6.5	Tanzania	
ESHAC ORGANIC INVESTMENT	2	1	3	1	4	4	4	4	1	2	26	5.0	Tanzania	
COCOZANIA GROUP	2	2	5	2	3	3	2	2	4	3	28	4.0	Tanzania	
ZANZIBAR SPICE AND HERITAGE CENTER (ZASPIHE)	2	2	3	3	3	3	3	3	4	3	29	3.0	Tanzania	
PLANT BIODEFENDERS	2	2	7	2	3	3	2	3	4	2	30	2.0	Tanzania	
LIVY AFRICA	3	3	5	2	3	2	3	3	3	4	31	1.0	Tanzania	

For further data on the surveyed companies, refer to the attached object below:

Company Profile
Data_Baseline Study

Company Profile Data_Baseline Study on Usage of EAOPS in Kenya, Uganda & Tanzania_V1.0

ANNEX II: LISTS OF KEY INFORMANTS INTERVIEWED

Country	Name of Organization	Name of Respondent	Designation
Uganda	Uganda Organic Certification (UgoCert)	Aminah Ngobi	Chief Executive Officer (CEO)
	National Organic Agricultural Movement of Uganda (NOGAMU)	Chariton Namumoza	Chief Executive Officer (CEO)
	Exporters Association	Farid Karama	Member
	Uganda National Bureau of Standards (UNBS)	Hakim Mufumbiro	Head, Food and Agriculture Standards Division
	CERES	Martin Majanja	Program Manager
	Ministry of Agriculture Animal Industry and Fisheries (MAAIF)	Alex Lwakuba	Commissioner Crop Production
Kenya	Kenya Organic Agriculture Network (KOAN)	Samuel Ndung'u	Program Manager
	ACERT Service Limited	Richard Mwangi	Program Manager
	PGS National Peer Review Committee	Sandarac Mbolonzi	National PGS Peer Review Chairperson
	Olivado EPZ LTD	Virginiah Nduku Mbatha	Relations Manager
	Kenya Bureau of Standards (KEBS)	Mercy Nyambura Ndirangu	
Tanzania	Tanzania Organic Agriculture Movement (TOAM)	Bakari Mongo	Chief Executive Officer (CEO)
	Kilimo Hai	Sandra Haule	Finance and Administration Manager
	Njombe Southern Highlands Development Association (NSHDA)	Ezekiel Richard Mcharo	Master Trainer