



2024 KENYA ORGANIC DATA SURVEY

Report by: Kenya Organic Agriculture Network



By

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Table of Contents

1.	Background	5
3.	Findings	5
3.1.	Products in the Market	5
3.2.	Certified Acreage and Farmers	6
3.2.1.	Participatory Guarantee System (PGS)	7
3.3.	Players and Market Segments	8
3.3.1.	Kenyan Sector Players	8
3.3.2.	Domestic Market	8
3.3.3.	Exporters and Processors	9
3.4.	Organic Products Gap Analysis	10
3.5.	Products Seasonality	10
3.6.	Organic Supply: Volume vs. Value in the Domestic Market	11
3.7.	Value Proposition	12
4.	Growth of Organic Area	14
5.	Number of Organic Farms	15
6.	Organic Sector Challenges	16
7.	Conclusion	17
8.	Discover Kilimohai: Your Organic Resource Hub	18
9.	10 Reasons to go Organic	19

2022 Organic Data Highlights



347

Product Range



97

Exporters certified



1,634

Farmers under the PGS



100

Processors certified



2,520

Acres total acreage under PGS



171,298

Organic Area



62,626

Farmers under ICS



172,760

Volume sold in kgs



171,298

Acres of land under ICS

KES

7,518,673

Value of products sold in KES

1. Background

KOAN has been systematically collecting data on organic operations in Kenya since 2007, primarily through surveys targeting specific segments such as production, markets, and consumers. Previous surveys include consumer surveys in 2007, 2012, 2014, and 2018, as well as a market survey in 2014 and 2022. However, this data collection has been ad-hoc, relying on project funding.

To address this, there is a growing recognition of the need for KOAN to establish a structured approach to data collection, to be conducted annually. As the national coordinating organization for the organic agriculture sector, KOAN is uniquely positioned to take the lead in this effort. This research paper presents findings from the 2022 annual organic data survey collected in 2023, aiming to enhance the sector's understanding and decision-making processes in the organic sector.

3. Findings

3.1. Products in the Market

The organic market in Kenya offers 347 different products across various categories, with fresh vegetables leading the assortment at 222 organic products, including arrowroots, broccoli, celery, amaranth, carrots, cucumber, and cabbage.

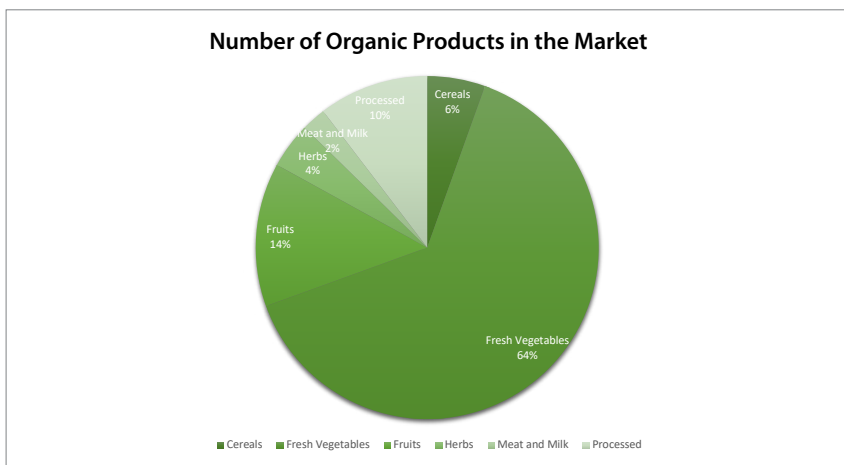


Figure 3.1: Number of Organic Products Available in the Market

In Kenya, there is a significant demand for various organic products that currently surpasses the available supply, presenting an opportunity for organic farmers and producers to expand their operations and meet the growing market needs, with notable gaps between demand and supply for products like passion fruit, tree tomatoes, and cherry tomatoes, as well as bananas, broccoli, and tomatoes.

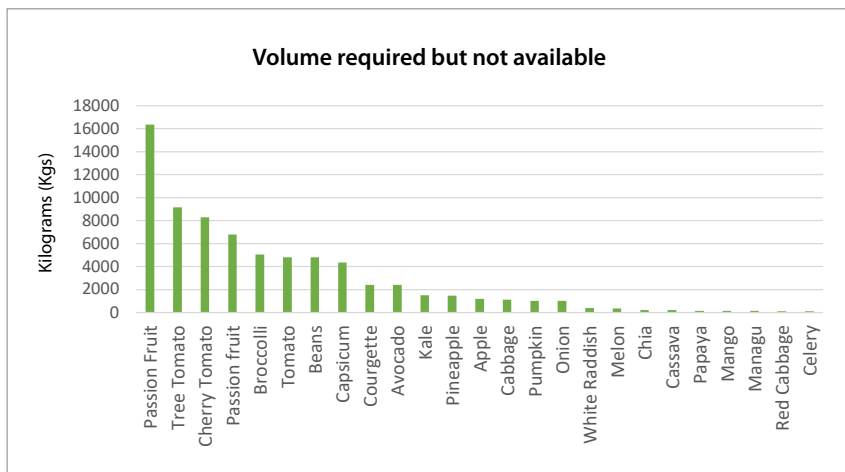


Figure 3.1.1: Volume required but not available

3.2. Certified Acreage and Farmers

These figures underscore the significant contribution of certification bodies to organic farming in Kenya, with ECOCERT standing out for its larger number of certified farmers and cultivated acres, indicating its strong presence and influence in the sector.

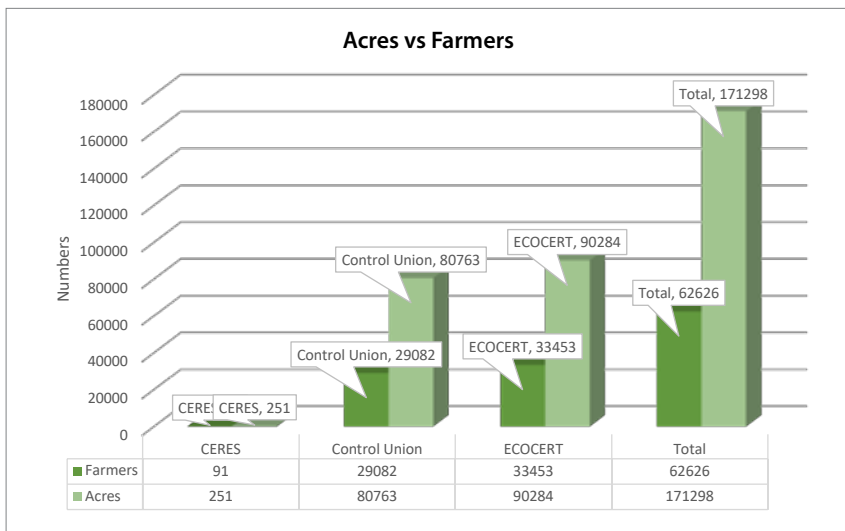


Figure 3.2: Certified Acreage and Farmers

3.2.1. Participatory Guarantee System (PGS)

During the reporting period, KOAN facilitated the certification of 1,634 farmers under the PGS framework, spread across various regions in Kenya, ensuring sustainable natural resource management and healthy, chemical-free food production, with a total acreage of 2,520 acres validating adherence to organic standards.

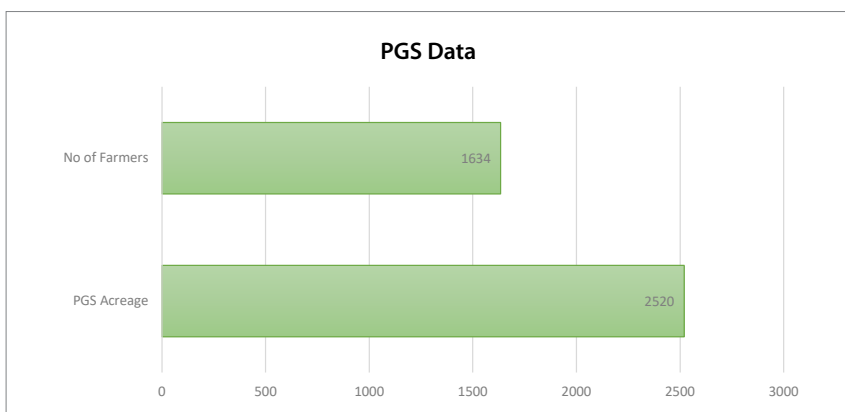


Figure 3.2.1: Number of Farmers versus Acreage under Participatory Guarantee Systems (PGS)

3.3. Players and Market Segments

3.3.1. Kenyan Sector Players

In 2022, Kilimohai Organic reported that 61% of their certified entities were retailers, 23% were institutions (colleges and training institutions), and both restaurants and processors each represented 8% of certifications, highlighting the increasing consumer demand for organic products in Kenya, with retailers playing a crucial role in making these products accessible to the general public and driving market growth.

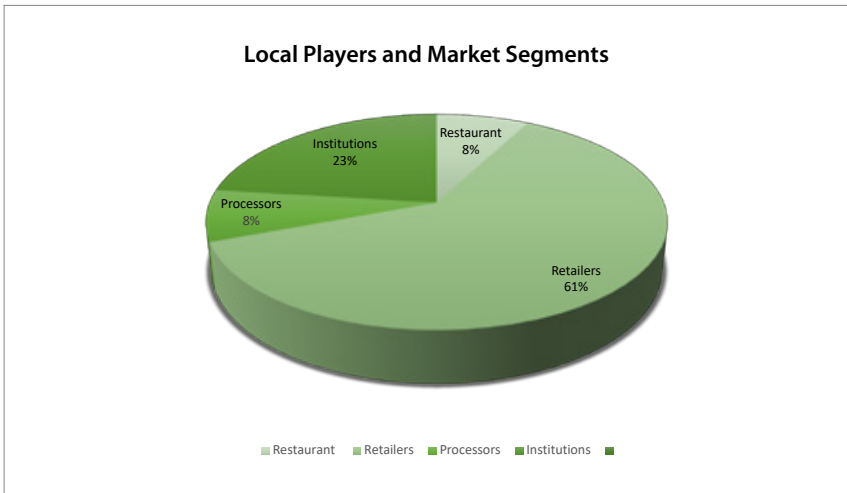


Figure 3.3.1: Local Players and Market Segments

3.3.2. Domestic Market

The domestic market saw diverse contributions from various players across different market segments, with 97% of organic farmers certified under Participatory Guarantee Systems (PGS) and the remaining 3% certified by third-party certifiers, as per collected data.

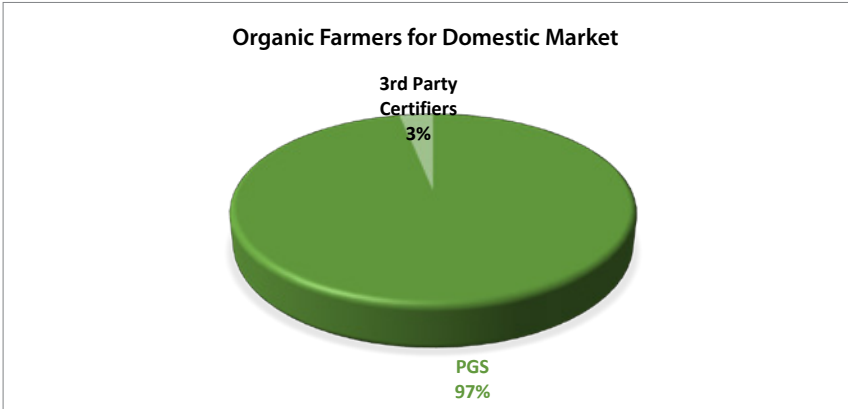


Figure 3.3.2: Domestic Market Certification

3.3.3. Exporters and Processors

The data on processors and exporters in Kenya's organic agriculture sector underscores the importance of certification for maintaining product integrity, particularly for export markets, and highlights the need to support these stakeholders with resources and training to uphold high standards, enhancing Kenya's position as a top producer and exporter of organic products.

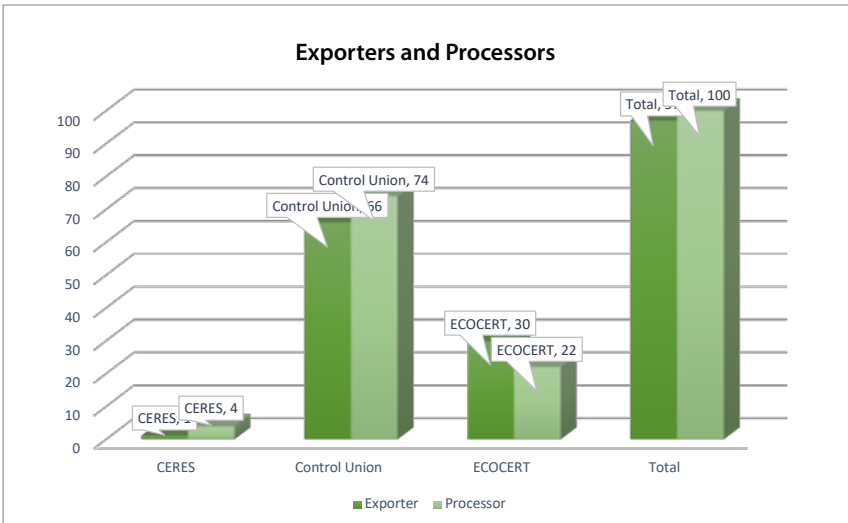


Figure 3.3.3: Certified Exporters and Processors under ICS

3.4. Organic Products Gap Analysis

The gap analysis for organic products in Kenya shows varying supply levels compared to demand, with onions, potatoes, and carrots well-supplied at rates of 80%, 100%, and 95%, respectively, while arrowroot, passion fruit, and kale have lower rates at 30%, 50%, and 20%, respectively, and green maize has the lowest at 33%, indicating a significant market gap that could be addressed by boosting production or distribution efforts.

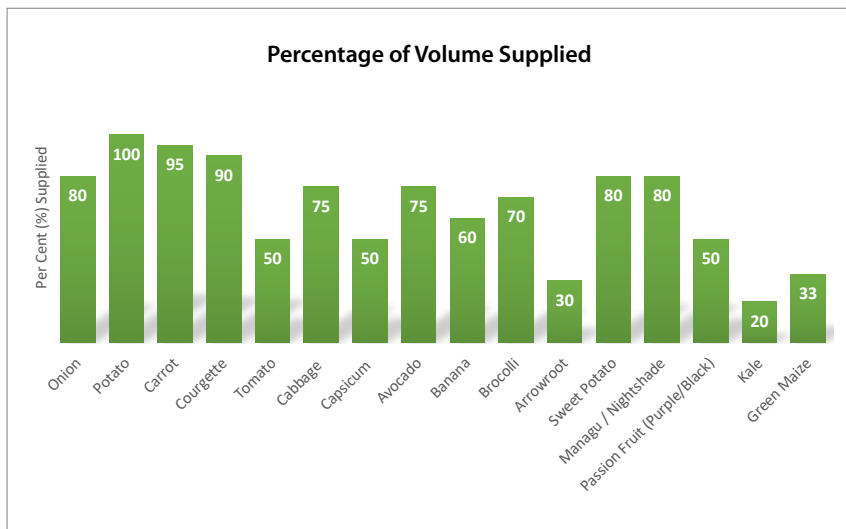


Figure 3.4: Percentage of Organic Products Supplied

3.5. Products Seasonality

Understanding the seasonality of organic products is crucial for farmers, traders, and consumers to plan production, marketing strategies, and purchases, ensuring access to the freshest and most flavorful produce.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mango	Green	Green	Green	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Green
Pineapple	Grey	Grey	Grey	Green	Green	Green	Green	Grey	Grey	Green	Green	Green
Avocado	Grey	Grey	Green	Green	Green	Green	Green	Green	Green	Green	Grey	Grey
Apple	Grey	Grey	Grey	Green	Green	Grey	Grey	Grey	Grey	Grey	Grey	Grey



Figure 3.5: Organic Product Seasonality in the Market

3.6. Organic Supply: Volume vs. Value in the Domestic Market

These figures highlight the significant contribution of organic farmers and the retail sector to the domestic market, both in terms of volume and value of organic products supplied.

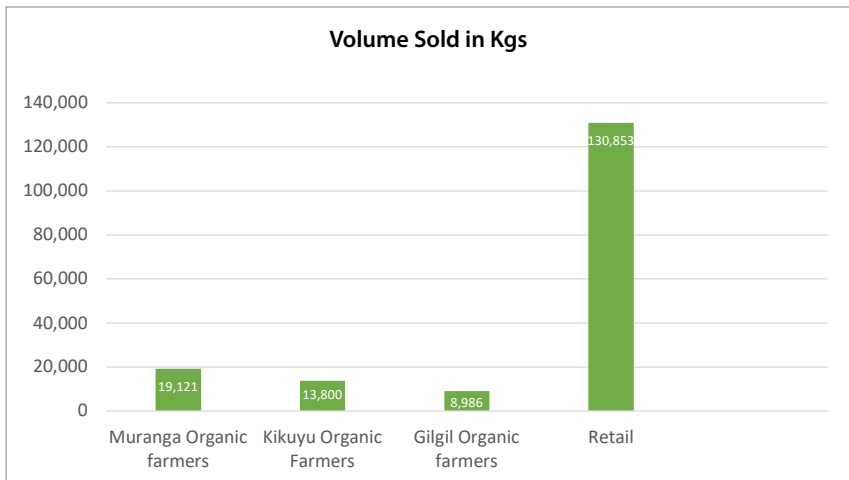


Figure 3.6.1: Volume Sold in Kilograms: 2022

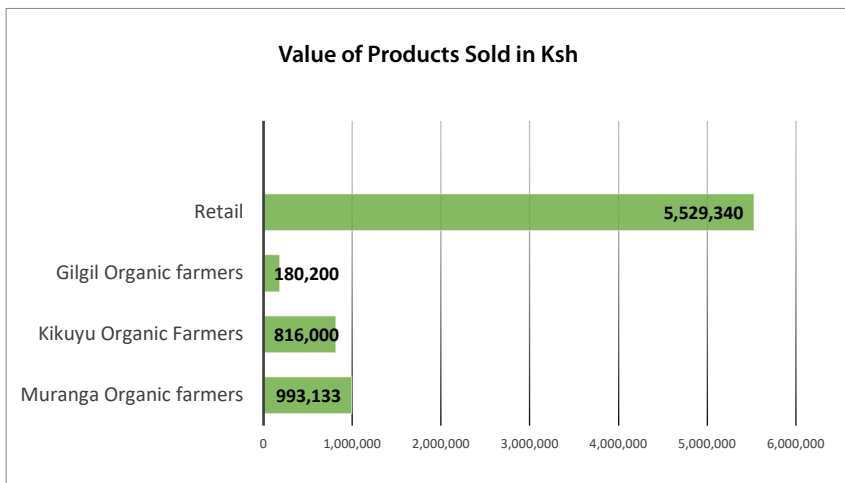


Figure 3.6.2: Value of Products Sold in Kenyan Shillings: 2022

3.7. Value Proposition

The organic agriculture sector in Kenya experienced notable growth in the production and consumption of various products, with sweet potatoes leading at 502,000 units, followed by butternut at 420,000 units, and arrowroot at 410,000 units, highlighting their appeal due to quality, nutrition, and contribution to domestic market food security that supports local farmers and communities.

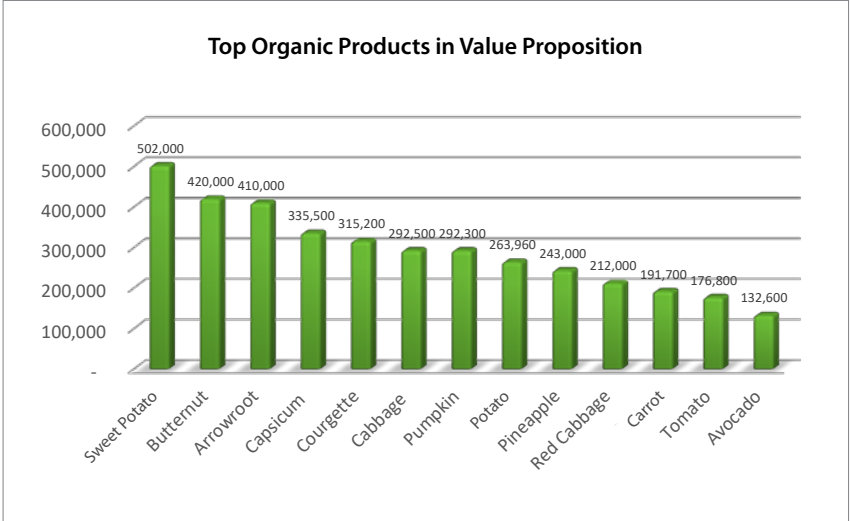


Figure 3.7: Showing top Organic Products in regards to value proposition

4. Growth of Organic Area

Kenya has seen a consistent increase in organic land area, from 84,538 hectares in 2007 to 171,298 hectares in 2022, with growth spikes in 2012-2013 and 2014-2015, reflecting a positive shift towards organic agriculture and highlighting the sector's resilience and potential for further growth in the country's agricultural landscape.

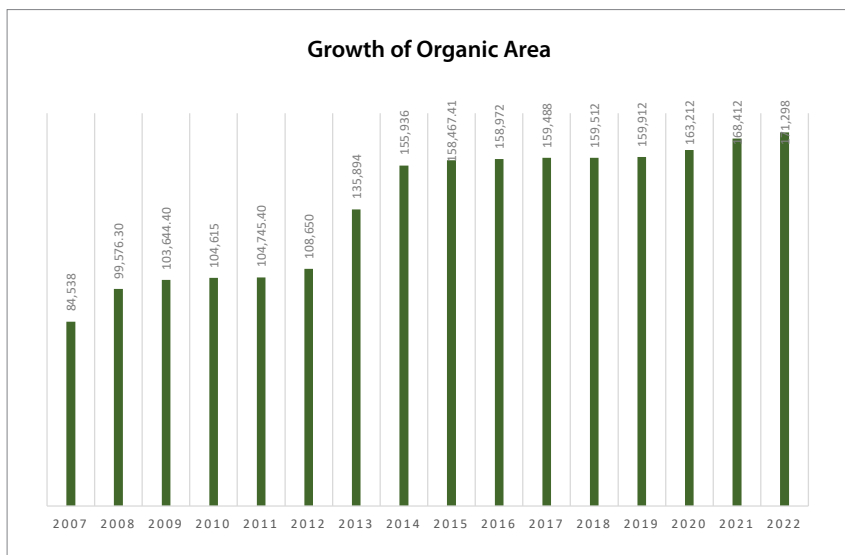


Figure 4.0: Showing trends from 2007 to 2022 on growth of organic area

5. Number of Organic Farms

Kenya has experienced a substantial increase in organic farms from 8,004 in 2007 to 62,626 in 2022, with notable growth spurts in 2013-2014 and 2020-2021, indicating a rising interest in and adoption of organic farming driven by the recognized benefits for the environment and economy, suggesting a promising future for organic agriculture in the country.

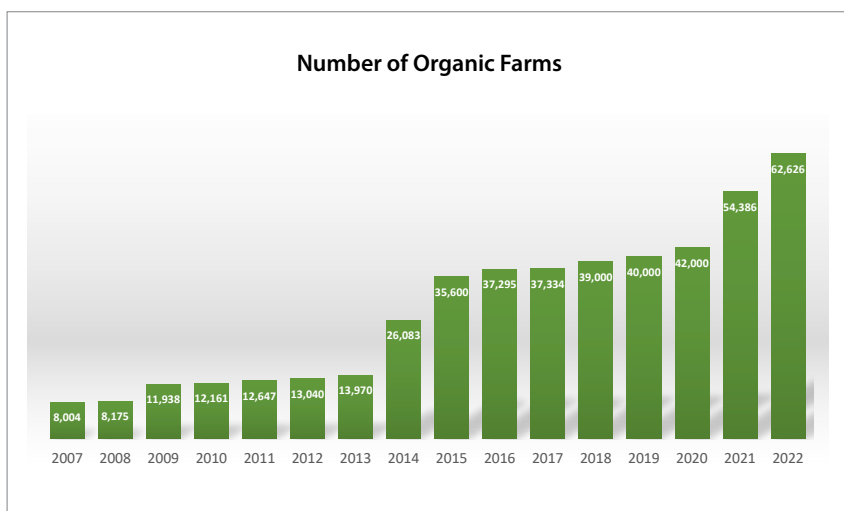


Figure 5.0: Showing growth of number of organic farms from 2007 to 2022

6. Organic Sector Challenges



Communication and Coordination:

Effective communication and coordination are crucial for the organic sector's growth, requiring improvements to connect producers with new markets and establish consistent supply chains, with KOAN actively engaging its members to ensure a steady flow of organic products.



Farming Techniques and Practices:

Enhancing farming techniques and practices, such as implementing early planting programs and intercropping with natural repellents, can optimize crop yields and reduce pests and diseases, while improving water reserves and hiring qualified agronomists can provide valuable expertise for sustainable organic farming.



Marketing and Distribution:

Increasing marketing efforts, opening more organic shops, and offering subsidies on organic products can raise product awareness, expand access, lower prices, and stimulate demand in the organic sector.



Supply Chain Management:

Efficient supply chain management, including encouraging direct picking of produce from farms and supporting farmers' groups to supply directly to traders, is essential for the organic sector's success, reducing costs, ensuring freshness, and strengthening the supply chain.

7. Conclusion

The 2022 organic sector data findings reveal a steady growth in organic farming across Kenya, with more farmers embracing organic methods, leading to increased acreage under cultivation and a rise in entities seeking certification. This trend reflects growing awareness and demand for organic products, both locally and internationally. Despite challenges such as access to markets and certification costs, stakeholders are exploring opportunities for innovation and collaboration to promote sustainable practices and meet consumer demands.

8. Discover Kilimohai: Your Organic Resource Hub

About Kilimohai Organic Kenya

Kilimohai Organic™ is the standard mark of Organic Certification in Kenya. Having it means that the product has been certified under East Africa Organic Products Standards. The mark of certification applies to agricultural inputs, fresh and dried farm produce, and processed food products. Visit www.kilimohaik Kenya.org for more details.

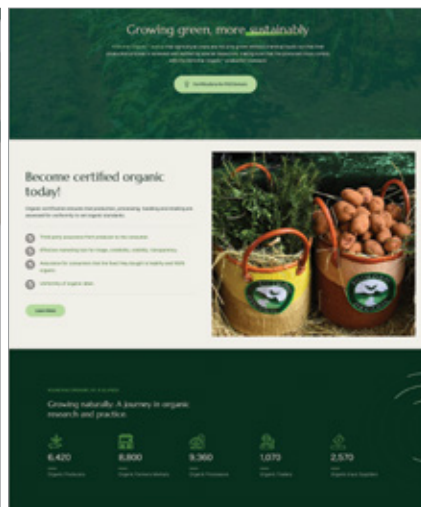
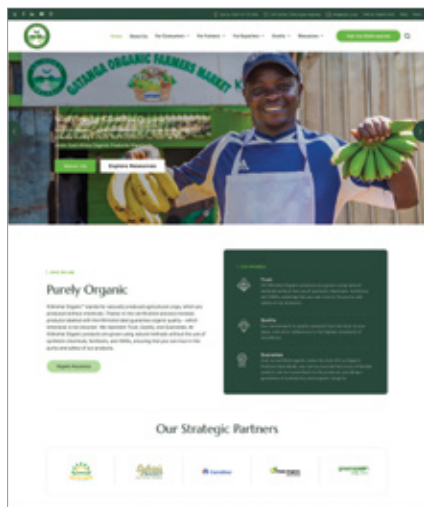
For more online resources on the Organic sector, please visit

<https://koan.co.ke>

<https://organicinputs.co.ke/>

<https://organicsoko.com/>

<https://saferinputs.koan.co.ke/home>



10 REASONS TO GO ORGANIC

1

Organic food is naturally tastier:
GREAT TASTE!

2

Organic food is naturally full of healthy nutrients:
NATURALLY HEALTHY

3

Organic Food has no harmful chemical residues:
CHEMICAL FREE

4

Organic production avoids Genetically Modified Organisms (GMOs):
HEALTHY CONSUMERS

5

Organic farming does not harm or cause diseases, including cancers, to farmers who do intensive chemical farming: **HEALTHY FARMERS**

6

Organic farming encourages biodiversity and conservation of indigenous seeds: **PATENT FREE SEEDS**

7

Organic production promotes soil health, plant health and animal health:
HARMONY WITH MOTHER NATURE

8

Organic farming recognizes local farmers indigenous knowledge:
RESPECTS TRADITIONAL WISDOM

9

Organic farming is in line with sustainable farming practices:
SUSTAINABLE FOOD SECURITY

10

Organic production does not pollute or degrade the environment:
ENVIRONMENTALLY FRIENDLY

Contact Us

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