



Boosting Organic Trade in Africa

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

PRODUCT MARKET BRIEF FOR TROPICAL FRUITS

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

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

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INTRODUCTION

Different kinds of mangoes sold on the roadside in Mali

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

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

This Market brief focuses on the organic market of Tropical Fruits in Africa. The complete series includes the following Market briefs:

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

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

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

Overview and development

Tropical fruits such as mangoes, pineapples, bananas and avocados are a major product group within the African organic sector. 23 of 54 African countries report on tropical fruit production in their country. These 23 countries are located mostly in Western and Eastern Africa. On a global scale, African organic tropical fruit production is important as well. Africa accounts for around 18% of global organic land for tropical fruit production.

The continent only has larger shares in global organic land for coffee, cocoa and olives.¹

For the European Union (EU), Africa's largest trade partner, tropical fruits represent the main product group in total organic imports. Since the climatic conditions in Europe do not allow the production of tropical fruits, the EU is dependent on imports to satisfy consumer needs. In 2019, 27% of total organic imports by the EU consisted of tropical fruits,

nuts and spices.² Moreover, imports of organic tropical fruits increased by 13% compared to 2018. Strong consumer interest in organic tropical fruits in Europe is driving the growth in imports. In 2019, the import value of organic tropical fruit represented around 9% of total tropical fruit imports by the EU. This is proportionally high given that retail sales of organic products (97 billion EUR³) only account for 0.9% of the total European food and beverage retail sales (1,129 billion EUR⁴).

Preserving tropical fruits offers several opportunities for value addition in Africa. Drying, juice manufacturing and potentially freezing can reduce food waste, add value to waste streams such as low-grade fruits and enables producers to diversify what they sell to the marketplace. Burkina Faso and Togo are among the leading African processors of tropical fruits.

Table: Number of suppliers of processed tropical fruit in selected African countries

Country	Suppliers of dried tropical fruit	Suppliers of tropical fruit juices
Burkina Faso	10	2
Madagascar	4	2
Togo	2	3
Uganda	3	1
Ghana	2	2
Tanzania	2	0
Kenya	1	0

Source: United States Department of Agriculture organic integrity database, 2020

Although not listed in the table above, Benin is a juice manufacturing country. An estimated 1% of Benin's total pineapple production of 345,000

tonnes is exported as organic pineapple juice to Europe. The tropical fruits sector is not organised in strong national organisations.

¹ Willer et al, 2020. The world of organic agriculture.

² European Commission, 2020. EU imports of organic agri-food products.

³ Willer et al, 2020. The world of organic agriculture.

⁴ Food Drink Europe, 2019. [Data & Trends of the European Food and Drink Industry 2019](#)

An entrepreneur in her mango processing factory in Burkina Faso



Tropical fruits production

Infographic Tropical fruits production



Certified organic land in ha:

40,226



Number of organic tropical fruit producers⁵:

Benin: 100 ■ **Madagascar: 5,000**

■ **Morocco: 100** ■ **Tanzania: 34**



Tropical fruits

**Mango, pineapple, banana,
avocado, papaya, passion fruit**

⁵ ProFound survey, 2020

Alphabetical list of African countries where tropical fruits are produced:

■ Benin ■ Burkina Faso ■ Burundi ■ Cameroon ■ Comoros ■ Cote d'Ivoire ■
 Ghana ■ Guinea-Bissau ■ Kenya ■ Madagascar ■ Mali ■ Morocco ■
 Mozambique ■ Nigeria ■ Reunion ■ Rwanda ■ Senegal ■ South Africa ■
 Sudan ■ Tanzania ■ Togo ■ Uganda ■ Zambia



Table: Organic tropical fruit production in Africa (raw material)

Countries	Area (ha)	Volume (t)	Export value (CIF in €)	Remarks
Burkina Faso	a) 10,213	a) 49,346	d) 81 million EUR	Mangoes comprise all organic production Assumption: € 1.65 /kg
Kenya	a) 8,437	a) 5,789	n/a.	
Tanzania	a) 6,063	a) 32,602	n/a.	
Madagascar	a) 3,002	a) 13,911	n/a.	
Uganda	a) 2,072	a) 138	n/a.	
Cote d'Ivoire	a) 1,943	a) 8,095	n/a.	
Senegal	a) 1,734	a) 6,969	n/a.	
Ghana	a) 1,173	a) 15,161	n/a.	
Comoros	a) 1,123	a) 993	n/a.	Only avocados
Zambia	a) 785	n/a.	n/a.	Only mangoes
Mali	a) 709	n/a.	n/a.	Only mangoes
Rwanda	a) 525	a) 129	n/a.	Only pineapples
Togo	a) 499	a) 14,726	n/a.	
Cameroon	a) 350	a) 2,143	n/a.	
Reunion	a) 337	n/a.	n/a.	
Benin	a) 268	a) 11,453	d) 1.7 million EUR ⁶	Volume only representing pineapples; assuming farm-gate price of EUR 0.15/kg
Nigeria	n/a.	c) 4,000	c) 0.5 million EUR	
Burundi	a) 164	a) 169	n/a.	
Guinea-Bissau	a) 59	n/a.	n/a.	Only mangoes
Sudan	a) 50	a) 400	d) 0.7 million EUR	Only mangoes Assumption: € 1.65 /kg
South Africa	a) 25	n/a.	n/a.	Only mangoes
Morocco	n/a.	c) 2097	n/a.	Mostly avocados

⁶ ProFound survey, 2020.

* Value is estimated as a multiplication of the volume by the export price.

We differentiate between a) Research Institute of Organic Agriculture – FiBL (2018) statistics b) other statistics such as the International Trade Centre's Market Price information portal <https://mpi.intracen.org/> c) resource person estimates d) own estimates.

Analysis

Tropical fruits are categorised as such because of their origin in regions with a tropical climate. Most tropical fruit production takes place in West, Central and East Africa where the climate is predominantly tropical.

- >> West Africa (Benin, Togo, Cote d'Ivoire, Ghana) is home to a particularly large pineapple cluster, although Madagascar is the largest organic pineapple producer in terms of organic land area.
- >> Mangoes are produced all over Africa. The period from April to September provides a window of opportunity for many African countries to supply international markets, as the major competitors Brazil and Peru cannot supply large quantities during that period.
- >> Avocado production is concentrated in Kenya. Kenya is the world's third largest avocado producer. Smallholders account for 70% of avocado production.
- >> Organic bananas, which account for 85% of EU organic tropical fruit imports, are mostly produced in Tanzania and Ghana. Cote d'Ivoire and Cameroon, two of Africa's leading conventional banana producers, only reported a small amount of organic banana production. According to Africa's largest banana company, Compagnie Fruitière, challenges with fungi and parasites are the major barriers to further increasing organic banana production. Strong competition from Latin American countries in the banana market is another major barrier for other African countries to export bananas.
- >> Madagascar is the main supplier of lychees to the EU. Lychees are considered an exotic tropical fruit and comprise a niche market within the European tropical fruit market.
- >> Kenya and few other countries produce small quantities of passion fruit and mainly target the European market.

A fair trade banana plantation in Uganda



The tropical fruits market

Infographic of the tropical fruits market



Main products for export markets:
Pineapple, banana, mango, avocado



Total volume of the exports:
n/a



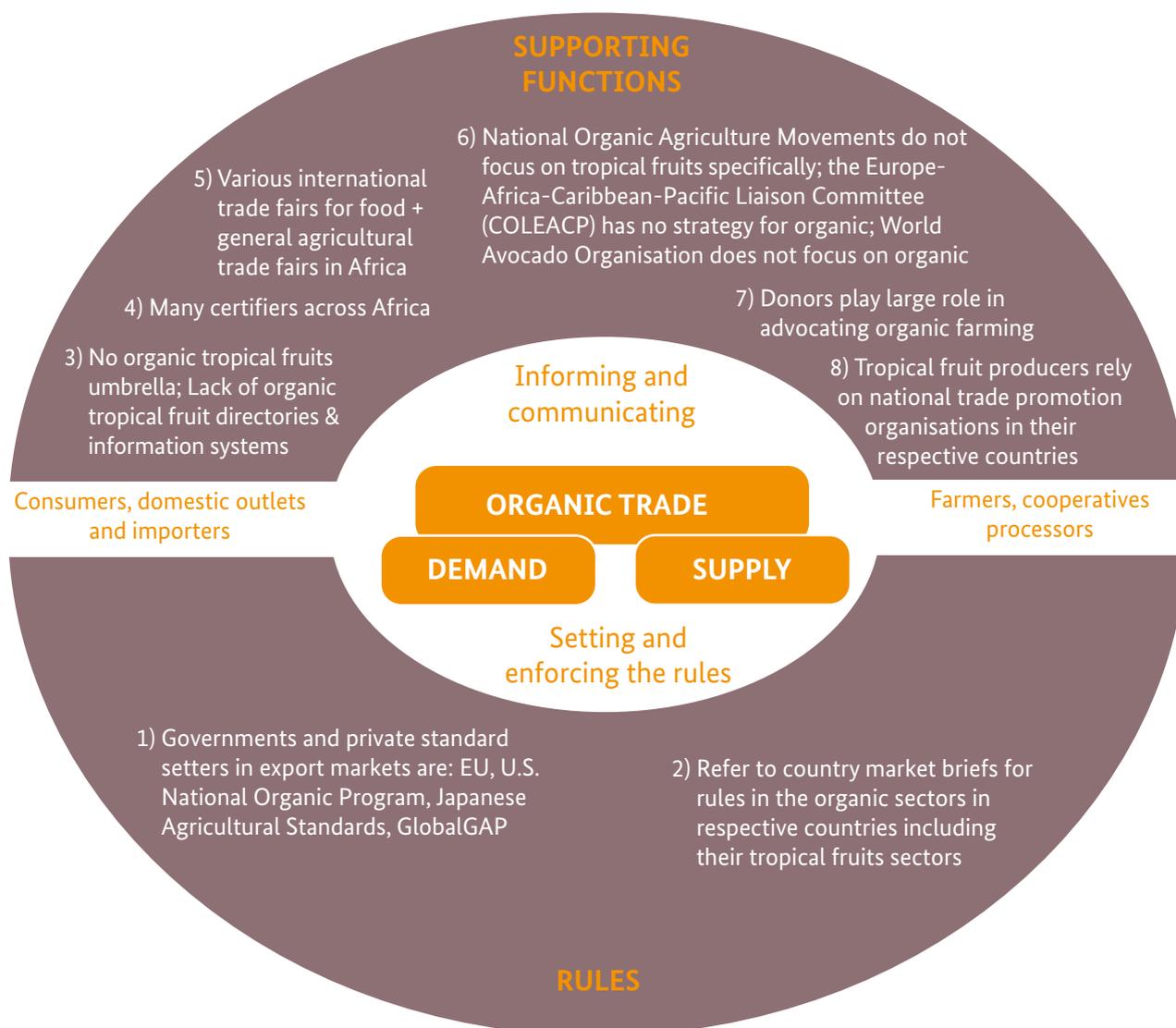
Total value of the exports:
n/a



Main target markets and their import volume:
EU: 43.6 thousand tonnes in 2019
USA: 3.3 tonnes in 2017 (only organic bananas)



Number of operators that are exporting tropical fruit from Africa:
n/a



Letters in the doughnut refer to:

- | | |
|---|-----------------------|
| 1) Export Standards | 5) Trade Facilitation |
| 2) Promoting Policies | 6) Research & Advise |
| 3) Organic Umbrella | 7) Advocacy |
| 4) Certification, Internal Control Systems & PGS ⁷ | 8) Promotion & PR |

⁷ Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks and knowledge exchange. More information can be found here: www.ifoam.bio/pgs

Supply chains' demand

The EU is the main market for African organic tropical fruit suppliers. Although Europe hardly produces tropical fruits, consumption of tropical fruits in Europe is significant. Tropical fruits such as bananas and pineapples have been widely available to consumers for many decades. These were also the first tropical fruit markets to develop an organic segment. European markets for avocados, mangoes, passion fruits and other tropical fruits have developed more recently. Some tropical fruits such as lychees and cashew apples are considered as exotic niche products. Ready-to-eat tropical fruits are a newer trend offering opportunities in particular for mangoes and avocados from countries with direct and frequent flight connections to Europe. Cote d'Ivoire is the leading supplier of organic tropical fruits to Europe (20,300 tonnes in 2019), followed by Ghana (18,300 tonnes) and Burkina Faso (5,000 tonnes).⁸

The USA sources tropical fruits mostly from Latin America, which is why its demand for African organic tropical fruits is considerably lower than demand from Europe. Africa was not represented at the 2019 edition of the **Produce Marketing Association (PMA) Fresh Summit** in Dallas, the largest trade fair for fresh fruits in the USA.

Tropical fruits play an important role in diets in Africa. Due to concerns over pesticide residues on fruits and vegetables, interest for organic fresh produce as a safe alternative has been growing.

⁸ European Commission, 2020. EU imports of organic agri-food products.



A market vendor selling mangoes and avocados in Tanzania

Supply chains' supply

23 African countries report on their organic tropical fruit production. The available data suggests that Africa is a major producer of a variety of organic tropical fruits. Production takes place on both small-scale and large-scale farms. Small-scale farmers rather supply aggregators that export the products to international markets. Large-scale farmers often export directly. African tropical fruit producers have not organised themselves as a sector and therefore rely on organic sector associations.

As tropical fruits are highly perishable, logistics play an important role in establishing successful exports. For this reason, landlocked African countries are disadvantaged in the market for fresh tropical fruits. In countries with a large concentration of tropical fruit production, processing industries have developed for drying and manufacturing juices.

Market place

Reports by the Europe-Africa-Caribbean-Pacific Liaison Committee (COLEACP) on the pineapple markets in Togo and Benin provide some indication of the importance of different market channels for tropical fruits. The estimates for different trade flows show that, in Togo, around 95% of fresh organic pineapples are exported to international markets (mainly Europe), 2% are exported to regional markets and 3% are sold locally. In the market for processed organic pineapples, a larger share of production is sold locally (16% of juices and 4% of dried pineapples). 84% of juices and 96% of dried pineapples are exported.

Although exports are driving organic tropical fruit production, a 2020 survey by Pro-Found showed that tropical fruits represent one of the main products available in local organic markets in Africa. In Benin, processed tropical fruits (mainly pineapples) were estimated to account for 40% of local organic retail sales. In Tanzania, fresh tropical fruits (avocados, bananas, pineapples and passion fruits) were estimated to account for 40% of local organic retail sales. In Nigeria, tropical fruits were estimated to account for 25% of local organic retail sales. In Kenya, fresh tropical fruits (mainly avocados) were estimated to account for 10% of local organic retail sales.

Supporting functions

<p>Organic Umbrella: The tropical fruits sector is not organised in one organisation. One of the main organisations in the African tropical fruits sector is COLEACP, a not-for-profit association of companies and experts committed to sustainable agriculture. They work with both conventional and organic tropical fruits. Their mission is to develop inclusive, sustainable trade in the market for fruits, vegetables and food products, focusing on the trade of the African, Caribbean and Pacific (ACP) countries with one another and with the European Union.</p> <p>Some sectors within the tropical fruits sector have organised themselves globally. For example, producing countries of conventional and organic avocados are organised in the World Avocado Organisation (WAO). African members of WAO are South Africa, Tanzania, Zimbabwe, Mozambique, Kenya and Morocco.</p>	<p>Advocacy: Development organisations active in Africa advocate for the adoption of organic farming in the tropical fruits sector. For example, the World Bank funded the improvement of income and food security for smallholders in West and Central Africa through the export of organic tropical products and fair trade.</p>
<p>Trade Facilitation Services: Africa does not host a trade fair specialised in tropical fruits. Nonetheless, numerous national agricultural trade fairs exist where tropical fruit suppliers can meet buyers.</p> <p>Since Europe is the largest buyer of organic tropical fruit produced in Africa, many organic tropical fruit suppliers promote their products at international trade fairs including FruitLogistica in Berlin, Fruit Attraction in Madrid and BIOFACH in Nuremberg. Some African companies exhibit at the Dubai Organic and Natural Expo.</p>	<p>Research and Advise: Globally, the Tropical Fruit Congress is a leading event for the tropical fruit sector to exchange information on market trends, consumption, trade, scientific developments, technology, and methods of selling products registering increasing demand in global markets. However, the conference programme does not cover organic tropical fruit specifically. Moreover, speakers at this congress have not included speakers from Africa yet.</p>



Workers processing mangoes in Ghana

Rules

Export Standards: Export standards for organic tropical fruit are derived from the EU regulation for organic agriculture.

Private Standards and Regulations: Most European buyers of tropical fruit, conventional and organic, require GlobalGAP certification.

In the Netherlands, the Sustainability Initiative Fruit and Vegetables (SIFAV), a major importer of tropical fruit, aims to increase sustainable sourcing by a group of leading companies in the fruit and vegetable sector. SIFAV members commit to buying fruit from suppliers complying with social and environmental standard set by organic regulations from the United States Department of Agriculture Leaf Marque, GlobalGAP crops, the EU, Bio Suisse.

Conclusions

Tropical fruit is one of the most important segments in the African organic sector. The total land area of 40,226 ha dedicated to tropical fruit represents only 2% of Africa's total organic land area. However, this land area represents 18% of global organic land for tropical fruit production. The 23 countries that have reported tropical fruit production are mostly located in West, Central and East Africa with tropical climates. Their main products are pineapple, mango, banana and avocado.

For external support, the companies in the organic tropical fruit sector mostly have to refer to general organic sector organisations in their respective countries, as tropical fruit stakeholders have not organised themselves in a tropical fruit sector organisation. Numerous donor-funded programmes have invested in smallholders and their supply of organic tropical fruit.

Strong consumer interest in organic tropical fruit in Europe is driving growth in imports. As a major source of tropical fruit for Europe, Africa's tropical fruit production is increasing to meet this growing demand. Cote d'Ivoire, Ghana and Burkina Faso are leading the supply of organic tropical fruit from Africa to Europe.

Apart from the export markets, local markets play an important role in the African organic tropical fruit market. Concerns over pesticide residues on fruits and vegetables stimulate local demand for organic tropical fruit.

Processing of organic tropical fruit adds value to products and opens new markets internationally and locally. The preservation of tropical fruit can potentially reduce barriers to trade, as trade in preserved fruit poses less logistical challenges than trade in fresh fruit.



Two men are interested in buying pineapples from a street vendor in Cameroon