Biovision Africa Trust

REPORT

THE TRAINING NEEDS ASSESSMENT OF COMPANIES IN EAST AFRICA IN THE ORGANIC SECTOR FOR THE ALLIANCE FOR PRODUCT QUALITY IN AFRICA (AFPQ) PROJECT

Title

STRENGTHENING REGIONAL TRADE THROUGH COMPLIANCE WITH THE EAST AFRICAN ORGANIC PRODUCT STANDARD (EAOPS)

Assessment conducted by Dakoke Communincations in partnership with Howard Associates

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LIST OF ACRONYMS

AfPQ	Alliance for Product Quality in Africa
AKU	Aga Khan University
BvAT	Biovision Africa Trust
EAOPS	East African Organic Products Standard
EAC	East African Community
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (German Agency for International Cooperation)
ICS	Internal Control System
IFOAM	International Federation of Organic Agriculture Movements
KJ	Kawakita Jiro Method
KOAN	Kenya Organic Agriculture Network
MA	Master of Arts
NGO	Non-Governmental Organization
NOGAMU	National Organic Agriculture Movement of Uganda
PGS	Participatory Guarantee System
ROI	Return on Investment
TNA	Training Needs Assessment
TOAM	Tanzania Organic Agriculture Movement

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ATTRIBUTION

This Training Needs Assessment (TNA) was conducted by Dakoke Communincations in partnership with Howard Associates contracted by Biovision Africa Trust under the Alliance for Product Quality in Africa (AfPQ) project. AfPQ is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the Federal Ministry for Economic Cooperation and Development (BMZ). Biovision Africa Trust (BvAT) coordinates the AfPQ project in Eastern Africa titled 'strengthening regional trade through the East African Organic Products Standard (EAOPS) in Kenya, Uganda and Tanzania BvAT implements the project in close collaboration with national partners, the Kenya Organic Agriculture Network (KOAN), the National Organic Agriculture Movement of Uganda (NOGAMU) and the Tanzania Organic Agriculture Movement (TOAM).

The views, interpretations, and conclusions expressed in this report are those of the authors and were developed in good faith following extensive engagement with participants.

ACKNOWLEDGEMENT

BvAT extends its heartfelt gratitude for the technical and financial support provided through the AfPQ project, implemented by GIZ Kenya on behalf of BMZ. We deeply value the commitment and collaboration of our national partners; KOAN, NOGAMU, and TOAM whose efforts in mobilizing participants, hosting workshops, and validating findings were instrumental to ensuring the success of this initiative. Together, these contributions have strengthened our shared mission of boosting organic trade in Eastern Africa.

We gratefully acknowledge the consultants engaged to carry out this assignment; Dissemination of Agricultural Knowledge in Africa (Dakoke Communications), in partnership with Howard and Associates Strategic Consulting Limited. Their expertise and coordination in data collection, analysis, and synthesis were invaluable in transforming diverse stakeholder insights into a coherent and actionable training framework. This work lays a solid foundation for strengthening capacities, driving innovation, and ensuring that agricultural knowledge reaches those who need it most.

We are indebted to the companies, PGS groups and broader value-chain actors; producers, processors, traders, exporters, certifiers and policy institutions, who contributed through surveys, interviews and focus group discussions. Their candid reflections on compliance, documentation, market access and governance realities made this assessment possible.

Finally, we thank all facilitators, rapporteurs and logistical teams in Kenya, Uganda and Tanzania whose behind-the-scenes efforts ensured smooth field operations and timely consolidation of results.

EXECUTIVE SUMMARY

This Training Needs Assessment was undertaken to identify and address the capacity gaps hindering the adoption and implementation of the East African Organic Products Standard in Kenya, Uganda and Tanzania. Commissioned under the Alliance for Product Quality in Africa project, implemented by GIZ and coordinated by Biovision Africa Trust, the study provides a robust, evidence-based framework to strengthen the region's organic sector. It builds on an earlier baseline study that revealed low awareness, weak compliance systems and fragmented institutional support. Using surveys, interviews, focus group discussions, performance analysis and the Kawakita Jirō Method, the TNA examined the training needs of 48 companies drawn from the three (3) countries, capturing insights at individual, organisational and systemic levels.

The findings portray a sector of growing importance but constrained by deep-rooted weaknesses. While companies demonstrate notable strengths in gender and youth inclusion and ethical practice, critical deficiencies persist in certification documentation, handling of certification processes, risk management and the establishment of Internal Control Systems. Awareness of EAOPS itself, and the ability to distinguish it from international standards such as those of the European Union, was found to be weak. Tanzanian firms displayed the lowest awareness and adoption levels, requiring basic sensitisation and introductory training. Ugandan companies showed higher engagement but remain constrained by high certification costs and fragile internal systems. Kenyan enterprises were relatively more advanced in awareness but still struggle with market access, certification documentation and governance shortcomings. Despite these country-specific variations, common regional priorities emerged, particularly the need to strengthen financial literacy, expand market opportunities, introduce digital traceability tools and harmonise policy support.

The TNA clusters training needs into five (5) thematic areas: documentation for organic certification standards, compliance for certification and standards, organic production and post-harvest handling, opportunities for market access, and improved communication within enterprises. It recommends a phased 18-month roadmap beginning with immediate awareness-raising (0–6 months), followed by institutional strengthening (7–12 months), and culminating in policy integration (12–18 months). A central pillar of this roadmap is inclusivity, ensuring women and young people not only participate in, but also benefit from, the development of the organic sector.

In conclusion, the assessment underlines that without urgent and sustained investment in capacity-building, the region's organic enterprises will remain marginal in both domestic and international markets. However, by addressing these gaps, the 48

companies engaged in this study can spearhead a transformation that unlocks East Africa's under-utilised organic trade potential, fosters regional integration, enhances export competitiveness and secures more sustainable livelihoods for smallholder farmers and enterprises across the region.

CHAPTER ONE: INTRODUCTION AND BACKGROUND

1.1 About the Alliance for Product Quality in Africa Project

The Alliance for Product Quality in Africa (AfPQ) is a multi-stakeholder partnership bringing together actors from the European and African private sectors, quality infrastructure institutions, and development cooperation. Its aim is to improve product quality in African partner countries, enabling enterprises to meet the requirements of regional and international buyer requirements, access new – often niche – markets, and thereby increase 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.

BvAT coordinates the implementation of AfPQ with a specific focus on strengthening regional trade through EAOPS in Kenya, Uganda, and Tanzania. National implementation is led by country partners: the Kenya Organic Agriculture Network (KOAN), the National Organic Agricultural Movement of Uganda (NOGAMU), and the Tanzania Organic Agriculture Movement (TOAM).

1.2 About AfPQ Implementing Partners

1.2.1 About Biovision Africa Trust

BvAT is a not-for-profit organization established in Kenya in 2009. The organization's goal is to alleviate poverty and improve the livelihoods of smallholder farmers in Kenya and across African countries, by dissemination of information, sharing knowledge and building farmers' capacity to adopt appropriate technologies, that improve human, animal, plant, and environmental health. BvAT has established itself as a leading champion of agroecology.

BvAT's theory of change is that when farmers are supported to adopt sustainable agroecological practices through access to information and training, agroecology is mainstreamed into public policy, and linkages among value chain actors are

strengthened. This, improves farmers' productivity, enhances food and nutrition security in both rural and urban communities, and promotes the agricultural systems to become more environmentally sustainablele.

1.2.2 The National Organic Agriculture Movements

1. Kenya Organic Agriculture Network

KOAN is the National organization to coordinate the activities of organic agriculture sector in Kenya and was born in 2005. Being a membership organisation, they provide leadership and professional services in a wide range of stakeholders such as farmers, retailers, exporters, non- governmental organisations and research organisations and institutions that represent over 200,000 farmers throughout the nation. The mission of KOAN is to lead, coordinate and both create awareness of ecological/organic agriculture industry among the masses thus improving its role in economic, ecological and social prosperities. The vision of a successful organic industry that creates robust healthy community and environments is the goal that the organisation is striving to achieve, and the main resources that will enable it to achieve it are training and capacity building, market connections, standardisation and certification of organic standards (including the regional Cambodian brand of Kilimoahi) and lobbying of conducive policies on the national level.

2. Tanzania Organic Agriculture Movement

TOAM is a non-governmental organization based in Tanzania, which is registered and founded in 2005. As the national umbrella organization, it has brought together and coordinated all the various stakeholders, such as the farmers associations, other NGOs, organic producers, academic institutions, and even the professional trainers to encourage growth and evolution in the organic farming industry across the nation. The general purpose of TOAM is building capacity in the agricultural practices that are organic, strict measure in quality management in line with international standards of organic, promoting agrarian value chain integrity, supporting the relevant policy

framework, and propagating through appropriate information. Its mission is to develop a vibrant, sustainable, and win-win organic industry that significantly supports the long run sustenance of the Tanzanian communities.

3. National Organic Agriculture Movement of Uganda

NOGAMU is the umbrella organisation of organic sector on the national beverage level. It was started in 2001 with a sole aim of organizing, marketing, and developing organic agriculture in Uganda by bringing together stake holders on the value chain such as farmers, processors, exporters and NGOs towards a joint push towards growing the industry. Having its mission to develop organic agricultural activities, networking, and marketing, NOGAMU strives to fulfil its vision of the increased incomes and better lifelihoods by means of introduction of the eco-friendly and sustainable approaches in the sphere of the agricultural practice. Its main activities include training of farmers and capacity building, assisting them on organic certification in order to meet the international standards, facilitating access to the market and building connections on the domestic and export level, carrying out research and development activities, and participating in the policy advocacy. However, it is worth noting that NOGAMU had a central place in the national adoption of the policy on organic Agriculture in Uganda.

1.3 Purpose of the TN Assessment

The overarching goal of the project is to stimulate and promote inter-regional trade in East Africa by facilitating the adoption and sustainable use of EAOPS in Kenya, Uganda, and Tanzania. Product standards are central to trade as they foster transparency, reduce technical barriers, and enhance market access, thereby enabling a smoother flow of goods, services, and investments across borders. In strengthening regional trade, the project seeks to deliver four key outputs and targets, namely:

i. At least 48 companies from Kenya, Uganda, and Tanzania are expected to tap into export opportunities, primarily within the EAC framework, with potential expansion to COMESA and, subsequently, AfCFTA.

ii. Enhanced capacity of companies and farmer groups: These 48 companies will achieve full compliance in trading under EAOPS within the region.

iii. Improved compliance among employees and farmers: At least 48 employees/farmers, including 24 women, will demonstrate compliance with EAOPS in their trade transactions.

iv. Strengthened support from national organic bodies: The three (3) national organic associations (KOAN, NOGAMU, TOAM) will provide improved services to facilitate EAOPS-based trade for their members.

1.4 Baseline Study on EAOPS Uptake and Organic Trade Potential in East Africa

To guide implementation, GIZ and BvAT commissioned a baseline study to assess the extent of application of the EAOPS among companies in Kenya, Uganda, and Tanzania. The study mapped organic companies already trading within the organic sector, and conventional companies with the potential to diversify into organic production. Particular attention was given to identifying companies with the capacity to scale operations and expand into broader regional markets.

The baseline assessed companies across several dimensions. These are; their stage of growth, production outputs, infrastructure, human resources, contribution to local and national economies, export readiness, their use of EAOPS and other international organic standards. It further identified both challenges and opportunities, such as trade barriers, and provided targeted recommendations to strengthen capacity for serving domestic, regional, and international markets. Overall, the project seeks to unlock the under-utilized organic trade potential in East Africa through greater uptake and application of EAOPS.

The baseline, commissioned by GIZ, highlighted several cross-cutting challenges across, Kenya, Uganda and Tanzania, such as:

1. Market intelligence - 67% of the respondents cited limited market information or lack of reliable export data (73% in Kenya, 70% in Uganda, and 56% in Tanzania).
2. Limited access to finance - 59% of respondents reported restricted credit for export-related activities (38% in Kenya, 82% in Uganda, and 60% in Tanzania).
3. Limited policy reforms & subsidy schemes - 60% identified insufficient government support or incentives as a significant barrier (54% in Kenya, 67% in Uganda, and 60% in Tanzania).
4. Inefficient, limited transport and logistics - 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).

1.5 About the Training Needs Assessment Report

This report presents the findings of the Training Needs Assessment for companies engaged in the organic sector in Kenya, Tanzania, and Uganda. It builds directly on the baseline study commissioned by BvAT, which mapped the status of organic trade in the region and highlighted the limited uptake of EAOPS. The baseline identified critical gaps in awareness, compliance, and institutional support, which in turn informed the scope and direction of this assessment.

Through AfPQ, BvAT is leading a strategic initiative to expand the adoption of EAOPS. Within this project, the TNA provides a vital bridge between the diagnostic insights of the baseline and the practical, capacity-building interventions required to address them. In doing so, it transforms the baseline findings into actionable pathways for strengthening company-level, institutional, and systemic capacity in the organic sector.

Despite EAOPS being central to facilitating trade and strengthening credibility, its adoption across Kenya, Uganda, and Tanzania remains limited. To address this challenge, the consultancy assessed the training needs of 48 companies and PGS

farmer groups across the three (3) countries. The objective was to identify capacity gaps and design appropriate practical and inclusive training modules to address them. These modules are intended to improve compliance with EAOPS, enhance competitiveness, and increase effective participation in inter-regional organic trade.

The assignment comprised three (3) core components:

i. Conducting a Training Needs Assessment at individual, organizational, and systemic levels, informed by national workshops.

ii. In-country stakeholder workshops for validation and co-creation, ensuring alignment with AfPQ's participatory and demand-driven approach; and

iii. Development of tailored training module outlines to address priority capacity gaps identified through both the baseline and the TNA findings.

1.6 Rationale for Training Needs Assessment

Although EAOPS offers a harmonized framework for organic production and trade, uptake remains low due to limited awareness, weak technical skills, and poor institutional support. To counter this, to understand which capacity gaps are critical barriers to adoption in Kenya, Uganda, and Tanzania, the TNA was conducted to identify and rank the key barriers to capacity adoption. The TNA determined five (5) key areas of needs including Documentation for organic certification standards, Compliance for certification and standards, Production and Post-harvest handling techniques, identification of opportunities for Market Access, and building communication channels within the companies, providing a clear roadmap for building technical and institutional capacity. Through them, organic sector in East Africa will possibly gain increased compliance, boost domestic, regional and international market access, and foster a skilled, inclusive, and competitive organic industry aligned with global standards.

CHAPTER TWO: APPROACH AND METHODOLOGY

Through a consultancy commissioned by BvAT and delivered by DAKOKE Global Communications in partnership with Howard and Associates Ltd, this assignment set out to conduct a TNA to identify skills gaps, capacity development needs and priority areas for workforce training among selected companies. The findings will inform the design of targeted training programmes and interventions.

The main objective was to assess the training needs of 48 companies, including their employees, to ensure capacity development aligns with the project goal of promoting the use of the EAOPS. Notably, current studies have shown that only 6% of the sampled companies from approximately 70 companies are using EAOPS, despite EAOPS being considered equivalent to EU Organic standards[1].

The specific objectives of this consultancy were, to:

a) Develop a TNA for companies selected for the project.
b) Using the TNA tool, identify existing knowledge, skill, and competency gaps barring companies from using and appreciating EAOPS.
c) Undertake analysis of data collected and present results to the participants.
d) Recommend specific training programs and delivery methods that align with project goals of supporting companies to transition to the use of EAOPS.
e) Develop training manuals and modules supporting companies to transition to the use of EAOPS.

The TNA for the EAOPS was undertaken using a mixed-methods approach that combined desk research, surveys, interviews, focus groups, and performance analysis. This methodology was designed to capture training needs at individual, organizational, and systemic levels, and to ensure that findings were both evidence-based. The KJ Method, also known as affinity diagramming, a qualitative research technique was

[1] Biovision Africa Trust, Baseline study on the usage of EAOPS by companies in Kenya, Uganda and Tanzania,2025

used to organize large volume of dataset, perceptions and needs into logical, meaningful categories for the training needs modules.

2.1: The approach and methodology process

A. Literature Review

A comprehensive review of materials provided by BvAT, alongside other relevant literature, was conducted to establish the baseline context. This highlighted existing knowledge on EAOPS adoption and informed the design of appropriate data collection instruments.

B. Stakeholder Engagement through physical workshops

The consultants participated in physical workshops in Kenya, Tanzania and Uganda. They facilitated data collection and focus group discussions (FGDs) with company representatives using designed TNA tools. The TNA tools were administered through the following methods:

a) Structured Questionnaires: a structured survey was administered to companies in Kenya, Uganda, and Tanzania in the physical workshops. The tool collected both quantitative and qualitative data on current levels of awareness, technical capacity, and compliance with EAOPS, as well as the areas requiring additional training and support.

b) Interview Schedules: Semi-structured interviews were conducted with carefully selected stakeholders, including company managers and subject-matter experts. These engagements provided deeper insights into organizational challenges, sector-specific needs, and capacity gaps that could not be fully captured through questionnaires alone.

c) FGDs: These were organized with company representatives and farmer groups to capture collective perspectives on shared challenges, expectations, and

training priorities. This participatory approach enriched the assessment by fostering dialogue and co-identification of needs.

d) Out of the 16 companies invited in Kenya, 13 participated in the workshop and their data was included in the in-depth analysis. 12[2] companies initially proposed were excluded as they did not meet the AfPQ project criteria. Exclusions were due to lack of value addition (operating only at farm production level), being service providers such as training or soil testing firms, inability to be reached or verified, or involvement in activities outside the scope of certifiable organic standards. In their place, new companies with stronger alignment to organic value addition and EAOPS adoption were brought into the project. For full details of the companies dropped and the new companies included in Kenya, readers are referred to the separate report on company participation prepared jointly by BvAT and KOAN.

e) Three (3) firms; Mesheddy Poultry farm, Bunyala Agri Climate Ltd, and Camlpo Ltd attended the workshops and FGDs, although they were not retained in the project. Consequently, we did not rely on any other information they provided in those sessions except the qualitative information.

C. Performance Analysis

Data collected from the TNA surveys, interviews, and FGDs was triangulated and systematically analyzed to assess existing competencies, roles, and skill levels. This step enabled the identification of gaps between current performance and the requirements for full EAOPS compliance.

[2] Good Times Farm, Soil Doctors Limited, Shamipo, Mesheddy Poultry Farm Vision, Basecamp Engineering, Infinite Organic Solutions Hub, Farm Share Kenya Ltd, Netrkrip Company Limited, Utawala Farm, Cityhub Consulting Services, Excelcious Farm Enterprises and Bermal Enterprises.

D. Affinity Grouping (Kawakita Jirō Method)

To synthesize the wide range of identified needs, the Kawakita Jirō (KJ) method was applied. This participatory clustering technique grouped training needs into five (5) meaningful categories, ensuring that complex and diverse inputs were organized into coherent training themes.

E. Data Anonymization and Confidentiality

To protect the confidentiality of participating enterprises in Kenya, Uganda, and Tanzania, the study applied a hybrid k-anonymity anonymization model.

This approach combined pseudonymization, each company name was converted to an anonymous identifier via a hashing function:

$$ID_i = H(C_i \| s)$$

Where

H = secure hash function (e.g., SHA-256),

$\|$ = concatenation,

s = random salt value for additional security.

generalization (binning)

$T_i = [0,5k]$ if $0 \le T_i < 5{,}000$

$[5k,20k]$ if $5{,}000 \le T_i < 20{,}000$

$[20k,100k]$ if $20{,}000 \le T_i < 100{,}000$

$[100k,500k]$ if $100{,}000 \le T_i < 500{,}000$

$[500k,+\infty)$ if $T_i \ge 500{,}000$,

perturbation

$T_i' = T_i + \epsilon_i$, $\epsilon_i \sim U(-\delta,\delta)$ Where $U(-\delta,\delta)$ δ = small perturbation bound (e.g., ±2–5% of T_i),

and suppression

If the count of companies within any bin was less than

k (here, k=3): If $n(B_j) < k$, T_i="Suppressed"

to ensure that sensitive financial information was not attributable to any single company.

Summary Formula

The final anonymised dataset is represented as:

$D* = \{(IDi, Ti*, Ti') | i = 1, 2, \ldots, N\}$

subject to: pseudonymisation: $IDi = H(Ci \| s)$,

generalisation: Ti mapped to bin,

perturbation: $Ti' = Ti + \epsilon i$,

suppression: if $n(Bj) < k$, then suppressed.

First, all company names were pseudonymized by replacing them with anonymous identifiers generated through a hashing procedure. This step removed direct identifiers while still allowing comparative analysis across records.

Second, annual turnover figures were generalized into ranges (e.g., 0–5k, 5k–20k, 20k–100k, 100k–500k, 500k+ USD). This technique masked precise values while retaining relative scales, which is critical for examining patterns of enterprise size and distribution.

Third, a process of perturbation introduced minimal random noise to turnover values reported in representative form. This reduced the likelihood of reverse-engineering original figures, while keeping results analytically valid.

Finally, a suppression rule was applied: where fewer than three companies ($k<3k<3k<3$) fell within the same turnover category, their values were suppressed (indicated as "Yes" in tables). This ensured compliance with the principle of k-anonymity by guaranteeing that no company could be uniquely identified within the dataset.

The decision to use the perturbation approach was guided by both ethical considerations and methodological rigour. It safeguarded the commercial sensitivity of small and large enterprises, strengthened trust with respondents, and maintained adherence to international research ethics standards. At the same time, it preserved data utility, enabling meaningful cross-country comparisons and policy-relevant insights without compromising confidentiality.

F. Validation and Synthesis

Preliminary findings will be validated through in-country workshops with stakeholders. This process is to ensure that the identified training needs accurately reflect ground-level realities and provides a solid basis for the development of practical, inclusive training modules.

Overall, the methodology combines quantitative tools (structured questionnaires and performance analysis) with qualitative approaches (interviews, FGDs, and affinity grouping). The integration of the KJ Method is particularly valuable, as it provided a systematic and inductive approach to clustering the diverse training needs into thematic categories: Documentation for organic certification standards, Compliance for certification and standards, Production and Post-harvest handling techniques, identification of opportunities for Market Access, and building communication channels within the companies. This triangulated approach ensured a holistic assessment that addressed individual competencies, organizational capacities, and systemic barriers to EAOPS compliance.

2.2: Limitations of the assessment

While the Training Needs Assessment yielded valuable insights into the capacity gaps and priorities of organic value chain actors across Kenya, Uganda, and Tanzania, certain limitations should be acknowledged.

Firstly, the study was conducted within a relatively short timeframe, which constrained the depth of data collection and the ability to triangulate findings extensively with secondary literature and wider stakeholder consultations. Secondly, while the assessment reached a diverse range of stakeholders (producers, processors, certifiers, and policymakers), the sample size was modest, relative to the scale of the organic sector in the region. This limits the degree to which findings can be generalized across all actors.

Thirdly, the reliance on self-reported information introduced the potential for bias, particularly where respondents may have underplayed or overstated their organizational capacity gaps in anticipation of future training opportunities. Furthermore, the dynamic nature of organic markets and regulatory frameworks means that training needs are likely to evolve rapidly, and the findings represent a snapshot in time rather than a static picture.

Despite these limitations, the participatory approach, regional scope, and systematic clustering of needs (using the KJ Method) ensured that the assessment provides a robust, demand-driven basis for the development of the five thematic training modules.

2.3 Stakeholder Engagement through physical workshops

To facilitate data collection through the TNA tool, BvAT facilitated three (3) physical workshops in Kenya Uganda and Tanzania.

In Tanzania the workshop was held from 24th to 25th July 2025 at Seascape Hotel in Dar es Salaam. The workshop aimed to validate findings from the EAOPS baseline study and assess training needs for selected companies in Tanzania. A total of 26 participants attended, including representatives from 16 companies, project partners (TOAM and BvAT), a representative from GIZ and regulatory bodies. The methodology combined presentations and group discussions to engage participants and gather input.

In Uganda, the workshop was held from 28th to 29th July 2025 at Protea Hotel, Kampala, Uganda and brought together over 23 participants, including representatives from 19 companies, certification bodies, regulators, regional organizations, and development partners. Key institutions in attendance included the Uganda National Bureau of Standards (UNBS), Africa Organization for Standardization (ARSO), BvAT, and GIZ. Consultants and technical experts facilitated the sessions, ensuring a balance between technical rigor and practical exchange.

In Kenya, the workshop was held from 31st July to 1st August 2025 at the Gelian Hotel, Machakos, Kenya. The workshop provided a platform for dialogue, learning, and collaboration between private sector companies, certification bodies, regulators, regional organizations, and development partners. A total of 27 participants attended, including representatives from 16 selected companies, KOAN–the project implementing partner, BvAT–the Executing Agency, and the donor GIZ, as well as continental and national institutions such as Africa Organization for Standardization (ARSO) and the Kenya National Bureaus of Standards (KEBS). Consultants and technical experts also supported the facilitation process, ensuring that both technical content and practical experiences were shared effectively.

Beyond creating awareness about the EAOPS and introducing the AFPQ project to the selected companies and other key stakeholders, the physical workshops provided a platform to administer TNA; one of the key methodologies for this exercise.

Group Photos of Workshop Participants from Kenya, Uganda and Tanzania (pages 14-16)

Representatives of SMEs in Kenya, under the Kenya Organic Agriculture Network (KOAN), during the workshop where the Training Needs Assessment tool was administered and participants provided their responses.

Representatives of SMEs in Uganda, under the National Organic Agriculture Movement of Uganda (NOGAMU), during the workshop where the Training Needs Assessment tool was administered and participants provided their responses.

Representatives of SMEs in Tanzania, under the Tanzania Organic Agriculture Movement (TOAM), during the workshop where the Training Needs Assessment tool was administered and participants provided their responses.

CHAPTER THREE: TRAINING NEED ASSESSMENT FINDINGS

This section presents the findings of the Training Needs Assessment for organic companies in Kenya, Uganda and Tanzania, It highlights the organizational profiles, market coverage, and financial capacity of the companies engaged, providing context for their ability to adopt and comply with EAOPS.

3.1 Tanzania Findings

3.1.1. Organizations Profile

Sixteen organic sector companies with nationwide coverage and representation of farmers' and companies' needs across Tanzania were engaged in the needs analysis. A majority (56%) operated across multiple regions including Kagera, Mwanza, Mara, Kigoma, Geita, Shinyanga, Simiyu, Arusha, Katavi, Rukwa, Tabora, Mbeya, Singida, Dodoma, and Iringa.

The companies involved in implementing EAOPS had an average of six (6) years of experience in organic production. The youngest company had been operating for one and a half (1.5) years, while the oldest was 18 years

These companies were at different stages of organic production, utilization of raw materials and staffing capacity. The average annual turnover was Tsh 379,924,957.40 (USD$ 153,971.61). The company, with the highest annual turnover, recorded Tsh 4.1 billion (USD$1,661,600.81), while the lowest earned Tsh 33,952.079 (USD$137.60).

Table 1. Anonymized Company Dataset with Turnover Categories

Anonymous Identifier	Turnover Range (USD)	Representative Turnover (USD)	Bin Size (n)	Suppressed
Company_2718	Suppressed	—	1	Yes
Company_6534	Suppressed	—	2	Yes
Company_5525	Suppressed	—	2	Yes

Company_8789	20k–100k	20,069.60	11	No
Company_4305	20k–100k	24,083.52	11	No
Company_9931	20k–100k	40,139.19	11	No
Company_9776	20k–100k	40,139.19	11	No
Company_6916	20k–100k	41,343.37	11	No
Company_6202	20k–100k	51,578.86	11	No
Company_7348	20k–100k	60,208.79	11	No
Company_8929	20k–100k	71,300.00	11	No
Company_9395	20k–100k	80,278.38	11	No
Company_9409	20k–100k	80,278.38	11	No
Company_4738	20k–100k	86,652.00	11	No
Company_4925	Suppressed	—	1	Yes
Company_7130	Suppressed	—	1	Yes

Note: *In the above (Table 1), company names were pseudonymized, and turnovers were generalized into ranges with slight perturbation. Suppression ("Yes") was applied where fewer than three (3) companies fell into a category, in line with a k-anonymity anonymization model to protect confidentiality while preserving analytical value.*

In terms of personnel, companies employed both permanent and temporary staff. On average, each company had 11 permanent staff and 17 seasonal staff. Due to inconsistent market for organic products and reliance on rain-fed agriculture; where raw materials are only available during specific seasons, many producer companies opted to hire temporary staff to meet seasonal demands.

The assessment revealed that 75% of the producer companies were aware of the existence and purpose of EAOPS. A further 19% demonstrated only partial awareness, while 6% of those assessed had no prior knowledge on EAOPS. However, awareness did not necessarily translate into implementation. In Tanzania, only one producer company (I Am Organic Company) representing 6% of those producer companies had adopted EAOPS. This producer company reported an annual turnover exceeding Tsh 200 million (80,045.08 USD) and employed seven (7) full-time (permanent contractual) staff with no temporary staff.

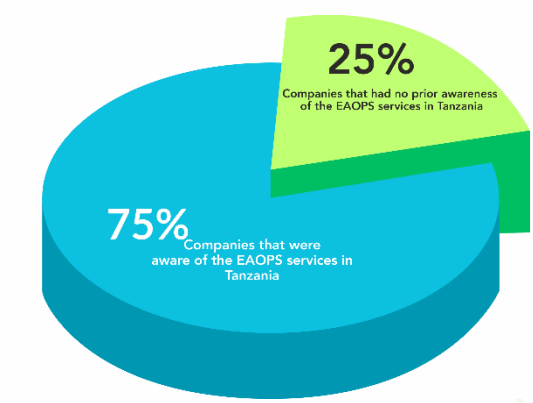

Figure 1: Awareness on levels of EAOPS

Sources of organic materials for production:

In Tanzania, organic products are primarily sourced from smallholder farmers, individual farms, and forest ecosystems, with key production areas located in the regions of Tanga, Morogoro, and Mtwara. Sourcing methods include self-production, local farmer networks, and formal out grower schemes.

A clear trend of diversification was observed among the producer companies. The breakdown of raw material sourcing is as follows:

1. Production from farmer's own farm (56%);
2. Production from purchases from small farmers/ out growers linked to companies (42%);
3. Production from forests & natural sources (wild harvesting) (12%).

Key regions for organic production in Tanzania:

- Tanga Region: Lushoto District, Pangani District
- Morogoro Region: Gairo District
- Mtwara Region: Masasi District

Dar es Salaam: Major hub for distribution and markets.

3.1.2 Existing Capacity Gaps

The average rating of organic companies' capacity in Tanzania was below average (an overall score of 2.2 out of a maximum of 5 points) in terms of awareness on EAOPS requirements, knowledge of organic standards, understanding of the certification process, compliance with trade standards, and establishing the systems and structures needed to meet the market standards for the organic products.

The assessment revealed significant gaps in staff knowledge and capacity regarding EAOPS among organic producer companies in Tanzania. Results in Table 2 (in the preceding pages) show the various capacity gaps identified, which are elaborated below.

i. Awareness of EAOPS requirements: The awareness level on EAOPS requirements among organic companies in Tanzania was low. For instance, only 13% of the companies had full awareness of the EAOPS requirements, while the majority (68%) of the companies reported that their staff had limited understanding of EAOPS' requirements, and 19% indicated that their staff had no knowledge at all.
ii. Knowledge of organic standards: The average score on the companies' knowledge on organic standards was low, despite organic production being their core business. For instance, 61% of the companies had never received any formal training on organic standards, while only 13% reported having received such training. 36% of the companies were not sure whether they received any formal training on organic standards. Where training had been provided, it was mostly

delivered internally by the company supervisors, covering topics such as PGS, certification and principles of organic farming.

iii. Understanding of the certification process: A major capacity gap was identified in certification. The assessment indicated 81% of the companies did not understand the EAOPS certification process, while the remaining 19% lacked detailed knowledge of how certification works in practice. See Fig 2 below

Fig.: Existing capacity gaps and knowledge level in EAOPS Certification Understanding in Tanzania.

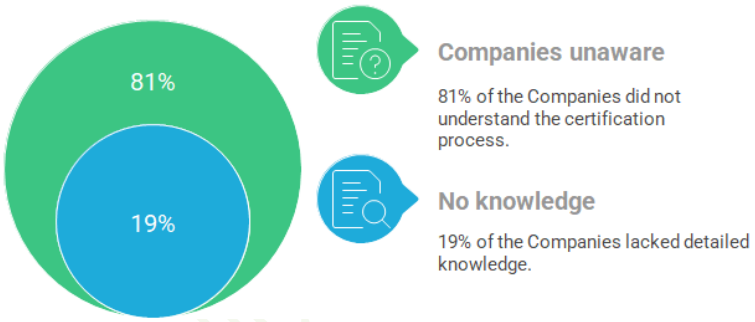

Fig 2: Existing capacity gaps and knowledge levels

iv. Trade compliance regulations: While 88% of the companies reported being aware of the trade compliance regulations, such as export laws and anti-bribery provisions, actual adoption of these practices was reported to be low. This gap stemmed largely from limited understanding and inadequate capacity to implement EAOPS standards, particularly in meeting traceability requirements.

v. Company Systems and Structures to facilitate compliance: The review indicated only modest progress in establishing internal systems to support organic compliance. The respondents rated the robustness of their companies' internal systems. For *Strong systems*: 6% of the companies reported having robust and well-established systems and structures. For *Moderately strong systems*: 41% had moderately developed systems that could support compliance but required strengthening to ensure consistency and effectiveness. For *Weak or absent*

systems: The remaining majority had weak or non-existent systems, leaving significant gaps in monitoring, documentation, and overall compliance capacity.

vi. Companies' ability to distinguish EAOPS from EU Organic standards: The assessment indicated low levels of companies distinguishing EAOPS from EU organic standards. For instance, the survey indicated that none (0%) of the organic companies could differentiate EAOPS from EU organic standards, 6% had some ability to differentiate these organic standards, 25% had moderate abilities to differentiate the organic standards, while 69% of the companies were not able to differentiate between EAOPS and EU organic standards. This finding was relatable to the reasons why the organic products faced hindrances in market access for African producers and potentially undermined the unique value of African organic products. In contrast, the EU[3] import rules were more stringent on African products.

vii. Understand the overall EAOPS framework: The EAOPS framework mainly aims to stimulate and promote regional trade within East Africa by creating a unified organic standard for the region. The assessment identified this as a training need since the organic companies in East Africa will only achieve this goal when their specific strategies are aligned towards a common goal. The assessment survey indicated none of the organic companies had a strong understanding of the EAOPS framework; 19% had a moderate understanding of the content, 31% had some basic understanding, while 50% of the companies had no understanding of the framework. The EAOPS framework is a key tool for economic growth and sustainable development in the region; thus, prioritizing the capacity building of companies on the framework will ensure that farmers and employees in the companies demonstrate compliance with EAOPS in their trading activities and improve services provided in Tanzania.

[3] African Organic Product Standards for the African continent? - https://doi.org/10.17159/1727-3781/2018/v21i0a4308

viii. Understanding of the trade compliance regulations (e.g. export laws, anti-bribery): There was a moderate level of understanding (among the organic companies) on the EAOPS trade compliance regulations. For instance, the survey indicated 38% of the companies had above average understanding on the trade compliance, 50% of the companies had moderate understanding on the compliance regulations, 6% had very basic understanding of the compliance regulations and 6% of the companies had no prior understanding of the EAOPS compliance regulations.

Table 2: Existing capacity gaps and knowledge levels

Capacity and knowledge tenets	Companies' rating on capacity and knowledge level				
	5=Strongly agree	4= Slightly agree	3=Moderate	2= Slightly disagree	1=Strongly disagree
1. Staff understand the EAOPS requirements.	0%	0%	13%	68%	19%
2. Our team has received formal training on organic standards.	13%	13%	13%	42%	19%
3. We can distinguish EAOPS from EU Organic standards.	0%	6%	25%	31%	38%
4. We understand the EAOPS certification process.	0%	0%	19%	31%	50%
5. We understand the EAOPS compliance requirements.	0%	0%	13%	31%	56%
6. We understand the overall EAOPS framework.	0%	0%	19%	31%	50%
7. We have internal systems for organic compliance (e.g. traceability).	6%	25%	38%	13%	18%
8. We understand trade compliance regulations (e.g. export laws, anti-bribery)	0%	38%	50%	6%	6%

3.1.3 Skills Knowledge Gap Analysis

The assessment of skills and knowledge gaps among organic companies in Tanzania revealed varying levels of competence across critical domains. The findings are presented in table 3 below:

Table 3: Skills knowledge gap analysis

	Not competent	Basic	Elementary Training required (Formal instruction)	Intermediate	Advanced
1. Competence in the EAOPS framework	0%	31%	38%	31%	0%
2. Organic production - post-harvest handling	12%	25%	25%	38%	0%
3. Documentation for organic certification	19%	56%	19%	6%	0%
4. Export compliance laws - trade regulations	13%	25%	31%	19%	12%
5. Risk management in trade compliance	13%	44%	36%	7%	0%
6. Traceability - record-keeping system	13%	31%	25%	31%	0%
7. Market demands - trends for organics	13%	31%	6%	19%	31%
8. Gender - youth	6%	0%	19%	50%	25%

integration in value chains					
9. Internal control systems (ICS) for compliance	6%	44%	25%	25%	0%
10. Corporate culture - ethics in organic trade	13%	19%	19%	44%	5%

From the above table, key skills knowledge gap discussions are summarized below:

a. Competence in the EAOPS Framework

The companies demonstrated limited understanding of EAOPS operational framework. For instance; 31% of respondents had basic competence in EAOPS framework, 38% needed formal training, and 31% had an intermediate competence which enabled them to implement selected sections of the EAOPS framework. No company reported advanced competence on the framework. This highlights the urgent need for structured and comprehensive training on EAOPS requirements to ensure consistent compliance across the sector.

b. Organic Production and Post-harvest Handling

In terms of organic production and post-harvest handling, the companies had a modal rating of 38% being at intermediate skill-level; while none of the companies had advanced level skills in production and post-harvest handling. The assessment indicated 25% of the organic producers had no formal instruction, while 12% had no skills in production and post-harvest handling. This suggests that while some foundational knowledge exists, post-harvest handling practices require significant upgrading to reduce losses and enhance value addition.

c. Documentation for Organic Certification

The average skill-level score on the documentation for certification was basic among 56% of the organic companies. Documentation emerged as a significant gap, with 75% of the companies positioned at non-competent or basic levels. Only 6% reported intermediate knowledge, and none reached advanced competence. Documentation is required of all inputs, processes, and handling procedures, creating a comprehensive audit trail that supports organic integrity claims. This given that documentation is fundamental for certification credibility, traceability, and market access, this represents a critical barrier to compliance and competitiveness.

d. Export Compliance and Trade Regulations

The average skill level assessment (50th percentile) indicated companies attempted to comply with the export and trade regulations but lacked formal training to firm up penetration into the markets. Capacity in export compliance laws and trade regulations was uneven. While 12% demonstrated advanced competence, 31% required formal training and 25% were at the basic level. This inconsistency poses risks for cross-border trade, underscoring the need for targeted capacity building in regulatory frameworks.

e. Risk Management in Trade Compliance

Risk management in trade compliance was identified as a system-wide weakness across companies. For instance, the average rating (at 50th percentile) indicated 57% of the companies had either basic or no skills on risk management. Over one-third (36%) required formal training, and 44% reported only basic competence. No company indicated advanced capability, exposing a vulnerability in sustaining compliance and resilience in export markets.

f. Traceability and Record-keeping Systems

The average score for traceability and record-keeping systems was 47% among organic companies. Traceability capacities were limited, with 31% at intermediate levels, but none (0%) at an advanced stage. A combined 44% reported basic or no competence. Since traceability is vital for maintaining organic integrity, enhancing record-keeping systems is crucial for both certification and consumer confidence.

g. Knowledge of Organic Market Trends

The assessment noted a below average level of knowledge on organic market trends, as well as a skewed trend in understanding of the market dynamics. For instance, while 31% of the companies had advanced knowledge of market demands and trends, an equal proportion only had basic competence. This disparity suggests that while some actors are strategically market-aware, others remain reactive and under-informed.

h. Gender and Youth Integration in Value Chains

This area showed relative strength, with 75% of the companies reporting intermediate or advanced competence, and 25% at advanced level. This demonstrates good awareness of gender and youth integration, although continued investment is required to translate knowledge into effective practice.

i. Internal Control Systems (ICS) for Compliance

Internal control systems presented a major weakness. Nearly half (44%) of the companies were at basic competence, 25% required formal training, and none achieved advanced levels. Weak ICS capacity undermines the sector's ability to maintain compliance and ensure accountability across producer groups.

j. Corporate Culture and Ethics in Organic Trade

Corporate culture and ethics were comparatively stronger. Almost half of the respondents (49%) reported intermediate or advanced competence. Nonetheless, 19%

required formal training, indicating uneven adoption of ethical practices within the sector.

Conclusion

The analysis indicates that companies possess relative strengths in gender/youth integration and ethical practices. However, significant gaps persist in technical and compliance-related areas, particularly in the EAOPS framework, certification documentation, risk management, and internal control systems. Post-harvest handling and export compliance require further reinforcement to achieve consistency and advanced-level competence. Addressing these gaps through targeted training and capacity-building initiatives is essential for enhancing compliance with EAOPS and improving the competitiveness of the organic companies in participating in regional and international markets.

3.1.4: Learning Approaches

The assessment revealed that 75% of the companies had previously participated in training opportunities related to organic trade or EAOPS. However, a significant gap was noted between the training sessions conducted, and the subsequent adoption of the skills and practices at the organizational level. This points to a need for more practical, participatory, and sustained approaches to capacity strengthening.

Regarding preferred learning approaches, companies expressed interest in mixed models of training delivery rather than singular methods. Specifically, 31% of respondents preferred a blended approach combining workshops, exchange visits, online platforms, and farm-side training. Another 31% favored a mix of farm-based learning and online sessions, highlighting the importance of flexibility and experiential learning. Additionally, 19% preferred a model centered on Training-of-Trainers (ToT) and demonstration sites to ensure sustainability and peer-to-peer learning. A smaller

proportion (13%) indicated a preference for purely field visits, underscoring the value of practical, hands-on exposure.

Overall, the findings suggest that a hybrid approach integrating experiential, digital, and participatory methods is most suitable for enhancing skills transfer and long-term adoption of EAOPS compliance practices.

3.1.5 Anticipated Barriers

During the Training Needs Assessment, several barriers that could hinder the adoption and effective implementation of EAOPS were recognized. These barriers were grouped into three main categories: (i) obstacles related to EAOPS adoption and certification, (ii) barriers specific to trade compliance, and (iii) internal organizational constraints. The analysis offers insights into the systemic, structural, and institutional challenges that need to be addressed to improve compliance with organic standards and boost participation in regional and international organic trade. The anticipated barriers to EAOPS Adoption and Certification were;

- Lack of awareness or understanding of EAOPS
- Complexity or ambiguity of the standard
- Lack of internal capacity to meet standards
- High cost of certification and inspections
- The major challenge on the certification was the cost incurred on soil testing and inspection
- Limited access to certified inputs or service providers
- Limited traceability and documentation systems
- Limited market demand or access for certified products
- Low buy-in from staff or company leadership
- Fragmented or weak supply chain linkages
- Gender or youth exclusion in certification processes

3.1.6 Obstacles related to EAOPS

EAOPS are important to ensuring firms involved in the organic sector guarantee organic quality. Organic quality assurance is managed under four interconnected domains: standards, accreditation, inspection, and certification. To maintain the integrity of organic products from farm to folk, these domains are handled together hence protecting both consumers and the organic producers. This assessment shows there are key obstacles related to the use of the EAOPS by producers and for which appropriate capacity building measures are needed. These are;

1. Trade Compliance Barriers

Barriers specific to trade compliance reflected the regulatory and administrative environment in which companies operate. These included:

- Limited understanding of export laws and tariffs
- Difficulty accessing updated regulatory information
- Limited staff capacity in trade documentation
- Risk of non-compliance due to Limited systems of implementation
- Cost of meeting legal requirements
- Fear of penalties or audits due to non-compliance
- Corruption or unethical practices in trade processes

2. Internal Organizational Constraints

Internal barriers were largely linked to governance and resource limitations within companies. Key issues included:

- Lack of clear compliance policies
- No dedicated staff or compliance officer
- Poor record-keeping practices
- Minimal investment in staff training
- Weak coordination between departments
- Absence of internal monitoring mechanisms

3.1.7 Adoption levels of EAOPS:

Standards are particularly important in their role in creating a level playing field. When companies deal with farmers in different regions who follow the same standards, then consumers can trust that organic products availed to them maintain consistent quality regardless of where they are produced. This consistency builds consumer confidence and supports fair trade practices in the organic marketplace.

This assessment shows that the companies surveyed are at different levels of implementing EAOPS. The assessment revealed that 19% were already working towards certification; 50% were willing to adopt within the next 6-12 months; while 31% remained interested but required more information and support before implementation.

The following priority interventions were identified to develop skills to accelerate the use of EAOPS.

1) Capacity strengthening: Bridge knowledge and skills gaps among staff with a particular emphasis on EAOPS during training sessions.
2) Governance support: Establish functional internal structures to ensure effective compliance and oversight.
3) Technical support: Provide targeted assistance to meet evolving market demands, ensuring products remain competitive across the East Africa region while delivering tangible benefits to smallholder farmers and small market enterprises.

3.2 Uganda Findings

3.2.1 Organization Profile

The organic companies in Uganda had an average of 9 years of operation. The most established firms (12%) were in existence for 20-28 years, while the youngest organizations had operated for 0-3 years in organic production. All participating

companies (100%) reported national marked coverage, distributing their organic products across the country.

The average annual turnover was UGX 209,167,060 (USD$58,624). The company with the highest turnover recorded UGX 1,089,367,759.25 (USD $305,556), whereas the company with the lowest annual turnover reported UGX 4,991,277.75 (USD$ 1,400).

Table 4. Anonymized Company Dataset with Turnover Categories

Anonymous Identifier	Turnover Range (USD)	Representative Turnover (USD)	Bin Size (n)	Suppressed
Company_0843	<5k	4,167.00	4	No
Company_3644	20k–100k	69,444.00	4	No
Company_5218	Suppressed	—	1	Yes
Company_7503	Suppressed	—	2	Yes
Company_7170	Suppressed	—	1	Yes
Company_0306	20k–100k	83,333.00	4	No
Company_5612	Suppressed	—	2	Yes
Company_6253	<5k	2,800.00	4	No
Company_2508	<5k	1,400.00	4	No
Company_5785	<5k	4,200.00	4	No
Company_1118	20k–100k	83,700.00	4	No
Company_4733	20k–100k	20,000.00	4	No

Note: *In the above table, company names were pseudonymized, and turnovers were generalized into ranges with slight perturbation. Suppression ("Yes") was applied where*

fewer than three (3) companies fell into a category, in line with a k-anonymity anonymization model to protect confidentiality while preserving analytical value.

From the analysis, the average number of employees per company was reported at 14. However, there were notable variations across the sampled organizations. One company had the highest workforce with 100 employees; while four (4) companies had the lowest staffing level, each employing only 3 staff members.

Awareness of EAOPS: The assessment revealed varying levels of awareness and adoption of EAOPS among companies in Uganda. Overall, 81% of the companies were aware of EAOPS, while 19% reported no prior knowledge of the standard *(See Fig 3 below).* Despite this relatively high awareness, implementation remained limited: only 25% of the companies had begun applying EAOPS, while 56% had not yet implemented the standard, even though they recognized its potential benefits for organic producers.

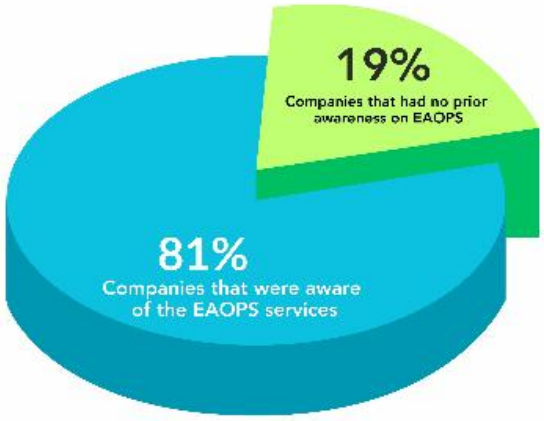

Fig. 3 Awareness level of EAOPS

Source of organic raw products for production:

The assessment highlighted a diversified sourcing model for organic raw products among Ugandan companies. Sources varied depending on seasonality, quality requirements, and cost implications for production. The survey findings showed that 44% of the companies relied on in-house production, while 56% of the companies sourced from out-growers and an equal proportion (56%) from organic farmer groups.

In addition, 13% obtained raw products from contracted suppliers, whereas 31% reported using a blended approach, combining in-house production, out-growers, and farmer groups. *See Fig 4 below:*

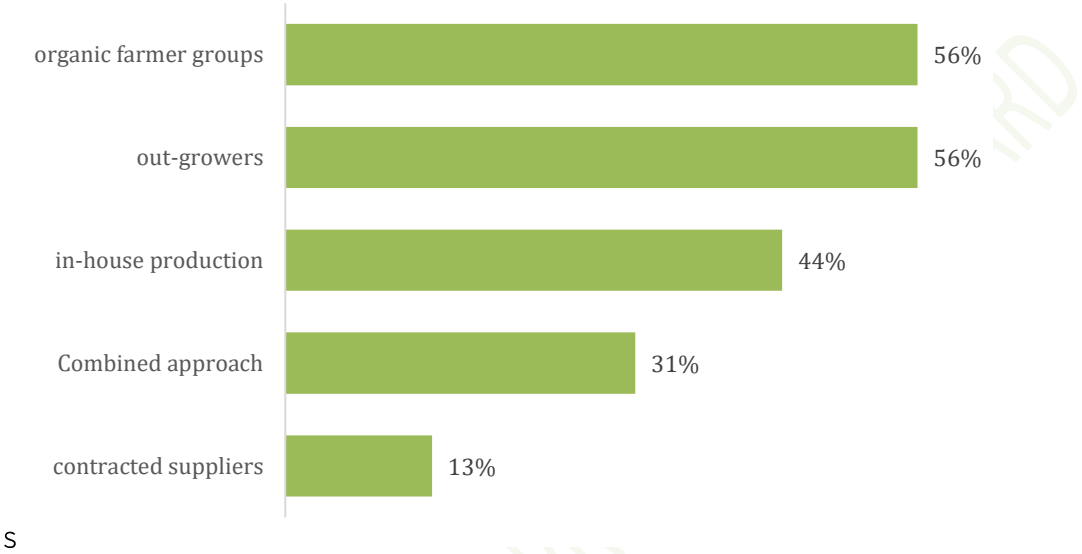

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Fig. 4 Sources of organic raw products for Companies in Uganda

3.2.2 Skills Knowledge Gap Analysis

The assessment revealed significant gaps in the knowledge, skills, and systems required for effective adoption and implementation of the EAOPS among organic companies in Uganda (see Figure 6).

i. Low understanding of EAOPS requirements: The average understanding levels of EAOPS requirements among companies was basic in 49% of the companies, while 51% of the companies had staff with no understanding of EAOPS requirements. On average, only 2 staff members per company possessed adequate knowledge of EAOPS, highlighting the need to train at least 12 more staff members per company to ensure effective implementation.

ii. Limited formal training on organic standards: An average of 38% of the organic company staff had received at least one (1) formal training on organic standards, while

62% had not received any training. The limited exposure significantly constrained the ability of companies to comply with EAOPS requirements.

iii. Limited differentiation between EAOPS and EU organic standards: A majority (81%) of companies were unable to distinguish between EAOPS and EU standards. Only 19% demonstrated strong capacity to differentiate the two (2), highlighting a critical knowledge gap in understanding market-specific requirements.

iv. iv. Low level of understanding of the certification process: Knowledge of the certification process was low: 37% of the companies reported understanding the process, 13% were unsure, and 50% had no idea how EAOPS certification process is conducted.

v. Low level of compliance requirements: Just 37% of companies were conversant with the compliance requirements, while 63% were not. This lack of awareness was cited as a major reason for low rates of certification and missed opportunities to leverage the benefits of compliance.

vi. Limited familiarity with the EAOPS framework: Only 19% of the companies demonstrated understanding of EAOPS framework, including its goals objectives and targets. The remaining 81% were unaware, limiting their ability to strategically align production and marketing practices.

vii. Low level systems for organic compliance: Internal systems to support organic compliance were generally weak. Only 12% of companies had strong systems in place, 19% had moderately efficient systems, while 69% had moderate to weak systems.

viii. Low level of understanding of trade regulations: Knowledge of trade compliance regulations such as export laws and anti-bribery measures was also Limited. Only 12% of the companies reported strong understanding, while 88% demonstrated moderate to weak awareness. This gap poses a significant risk to compliance with international trade requirements.

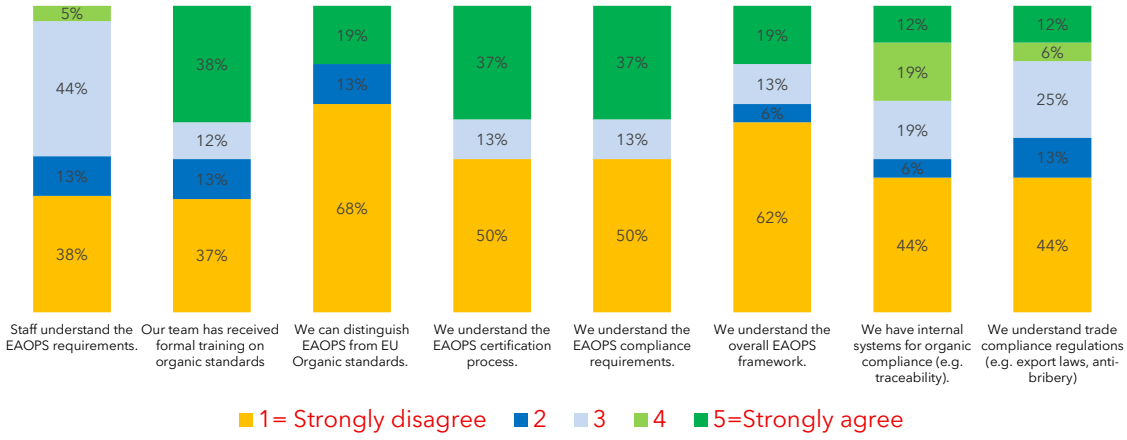


Fig.5: Companies' rating on their levels of skills and knowledge

3.2.3 Learning Approaches and training

The assessment identified significant capacity-strengthening needs among organic companies in Uganda, highlighting opportunity to enhance their production efficiency and market competitiveness in trade and for long-term sustainability. Overall learning levels were relatively low, contributing to reduced production and limited market access. Notably, only 6% of the companies had received training related to organic trade and or the EAOPS. The training provided by Business Friends Africa[4] primarily focused on organic production.

Based on the gaps identified, the following training topics are recommended for organic companies in Uganda:

a) *Compliance and Certification*: This is to cover important areas such as Organic standards & regulations; Certification processes; record-keeping requirements.
b) *Market access and organic produce export:* Market linkages and branding strategies; Trade and export training; Organic product export procedures.

[4] Business Friends Africa - https://businessfriendsafrica.org/

c) *Production & Quality Control:* Best practices in organic farming/production; Nutrient content standardization & concentration; Quality control measures; standard guidelines.

d) *Post-Harvest & Processing:* Recommended machinery for organic processing; Product development (e.g., value-added products); Vegetable processing requirements.

e) *Administrative & Documentation:* Tools for records management; Traceability and compliance documentation.

Preferred Training modes in Uganda

Most of the companies (38%) preferred the training modes to use in-person workshops or a blend of in-person workshops and exchange visits. The practice of learning from what peer companies were practicing as well as receiving coaching support from a peer organic company was more popular among the companies in Uganda. Training through only exchange visits was preferred among 18% of the companies and 6% preferred training conducted in-person at the production site. *See table 5.*

Table 5: Mode of Training of Organic companies in Uganda

Mode of training organic companies win Uganda	% (N=16)
In-person workshops	38
Exchange visits	18
In-person at the production site	6
Blend of in-person and exchange visits	38

3.2.4 Barriers to adoption and implementation of EAOPS

The assessment identified several challenges likely to hinder the adoption and implementation of EAOPS among organic companies in Uganda.

The most critical barriers reported were:

a) High cost of certification and inspection (94% of companies).
b) Limited internal capacity to meet EAOPS requirements (88%).
c) Low awareness and understanding of EAOPS (88%).
d) Complexity and ambiguity of EAOPS standards (81%).
e) A smaller proportion (13%) reported challenges relating to gender and youth inclusion, suggesting that while diversity initiatives are present, they remain limited in scope.

Trade compliance barriers:

Beyond critical barriers which were looking internally into the companies, these companies are also faced significant barriers outside their control to EAOPS compliance. The most frequently cited were as below, and to what extent they are prevalent:

i. High cost of meeting legal requirements (100%).
ii. Limited access to updated information (100%).
iii. Corruption and unethical practices in trade processes (63%).

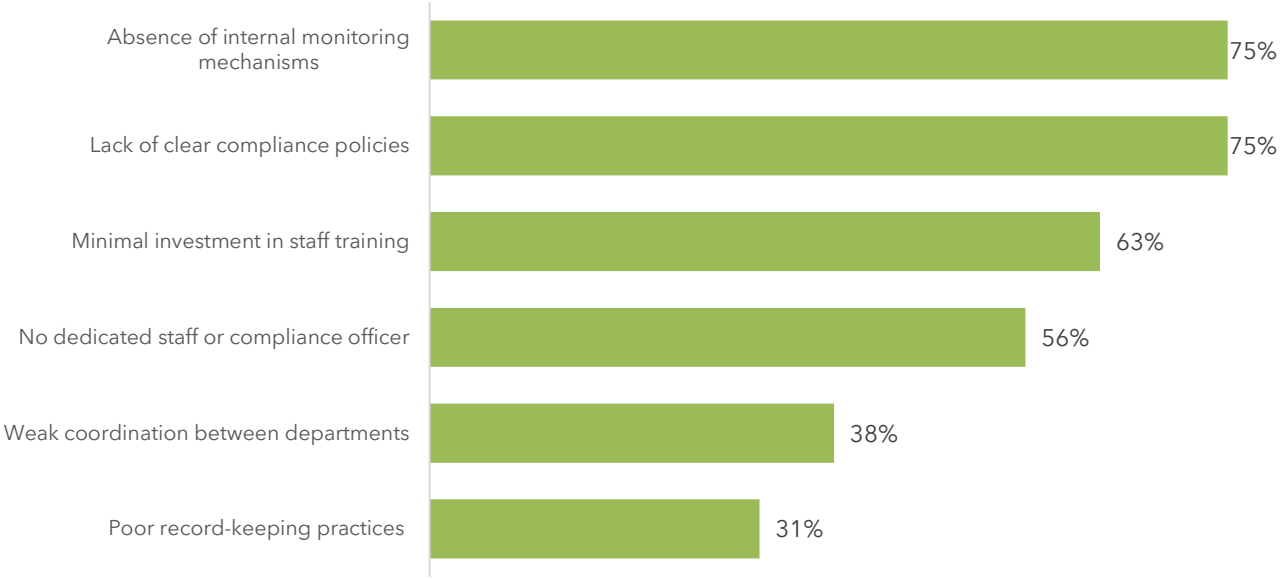
These barriers collectively illustrate both structural and systemic obstacles that limit effective adoption of EAOPS. See Fig. 6 below.

Fig 6: External barriers to compliance faced by the companies in Uganda

Internal company constraints limiting EAOPS Adoption and Trade Compliance

The assessment examined internal organizational constraints affecting the capacity of organic companies in Uganda to adopt EAOPS and comply with trade regulations. The three most significant barriers identified were the absence of internal monitoring mechanisms (75%), lack of clear compliance policies within organizations, and limited investment in staff training (63%).

On a more positive note, over half of the organic companies demonstrated sound record-keeping practices, with only 31% reporting difficulties in this area. However, weak internal structures and poor coordination further constrained EAOPS adoption. Many companies' departments that operated in silos, slowing down implementation efforts. Specifically, 38% cited weak interdepartmental coordination as a barrier, while 56% reported the absence of compliance staff or officers, which considerably delayed the adoption and implementation of EAOPS.



These findings highlight the need to strengthen internal systems, establish clear compliance frameworks, and invest in continuous staff capacity-building to support effective and timely EAOPS adoption in Uganda. *See Fig 7 above;*

Fig 7: Internal issues limiting organic companies' ability to adopt EAOPS

The needs assessment survey further revealed the specific capacity strengthening areas required to overcome these challenges, highlighting the necessity for targeted interventions to support production growth, enhance adoption of certified organic practices, and strengthen market integration for organic companies in Uganda. *See Table 6 below.*

Table 6: Specific needs per company in Uganda

Organic Companies (Uganda)	Priority areas to support
1. Reapers group of companies	Financial support and subsidies for certification. Access to certified input suppliers and service providers. Peer exchange or regional knowledge-sharing platforms.
2. Western Silk Road Limited	Financial support and subsidies for certification. Technical training on organic standards. Peer exchange or regional knowledge-sharing platforms.
3. Vermipro Limited	Technical training on organic standards. Financial support and subsidies for certification. Digital tools for traceability and documentation.
4. Kanyes Dairy Farm smc Limited	Financial support and subsidies for certification. Access to certified input suppliers and service providers. Peer exchange or regional knowledge-sharing. platforms
5. Afri soko connect	Financial support and subsidies for certification. Technical training on organic standards. Peer exchange or regional knowledge-sharing platforms.
6. Banyakinkizi Coffee Producers & Processors Society Ltd	Financial support and subsidies for certification. Technical training on organic standards. Digital tools for traceability and documentation.
7. MOHCA Beauty and Skincare Ltd	Financial support and subsidies for certification. Technical training on organic standards. Digital tools for traceability and documentation.
8. Makonde Organics Uganda Limited	Financial support and subsidies for certification. Trade compliance training and policy guidance. Digital tools for traceability and documentation.
9. Guide Leisure Farm	Financial support and subsidies for certification. Technical training on organic standards. Trade compliance training and policy guidance.
10. Patience Pays Initiative	Financial support and subsidies for certification. Technical training on organic standards. Digital tools for traceability and documentation.
11. Memago Agroecology Ventures Uganda Ltd	Financial support and subsidies for certification. Technical training on organic standards.

	Trade compliance training and policy guidance.
12. JERO Enterprises ltd (JERO Farm)	Financial support and subsidies for certification. Technical training on organic standards. Trade compliance training and policy guidance. Access to certified input suppliers and service providers. Mentorship or coaching from experienced companies.

Readiness to Adopt EAOPS and Enhance Trade Compliance

The assessment revealed a strong willingness among companies to adopt EAOPS and strengthen trade compliance. Specifically, 17% were already in the process of using the standard; 67% expressed readiness to adopt within the next 6–12 months; while 16% indicated interest but required additional information and support before moving forward.

These findings point to a generally positive outlook for EAOPS adoption across the sector. However, targeted technical assistance, structured guidance, and sustained capacity-building will be essential to bridge existing knowledge and resource gaps, ensuring that readiness translates into effective and timely compliance.

The following were the anticipated challenges and fears of the EAOPS.

In addition to the identified obstacles to adoption, the workshops also identified a diverse set of perceived obstacles, as well as concerns summarized among companies on the implementation of the East African Organic Products Standard (EAOPS). These were mainly influenced by uncertainty regarding compliance processes, perceived financial risks and operational restriction. Although most companies were positive about the advantages of EAOPS, they also emphasize the practical challenges they anticipate to face as soon as the implementation starts.

1. Financial Constraints

The greatest challenge expected was financing. The most common observation among the respondents was that certification is still a significant target of the smallholder farmers and SMEs due to the price of compliance. One respondent reported that, the peers in production sector have often reported that the cost of certification remains a key deterrent to the smallholder farmers and SMEs.

Heightened production difficulties or loss of compliance once certified are the main reasons many companies are afraid of, particularly due to limited financial resources. The cost factor was cited to be incredibly high and it was recurrent, getting too cumbersome particularly to start ups and small businesses in terms of upfront and again recurring costs such as auditor fees, documentation systems, and continuous quality assurance.

A number of other companies threatened with costly compliance. Creating internal controls, regular auditing and investing in traceability infrastructure would most probably be out of their money. In the absence of specific funding, including grants or subsidies or reduced interest rates, a large number were concerned that certification would be limited to larger companies, creating further disparity in the organic sector.

2. Input and Supply Chain problems.

The second issue of concern is availability and accessibility of certified raw materials and inputs. The interviewees mentioned that obtaining certified organic seeds, bio-fertilissers and pest control products is a continuous challenge. In areas where such inputs are available, they cannot be in sufficient quantities or affordable by small producers.

It was also said that there was a low adoption of certified inputs among farmers. Some farmers do not know the advantages of using certified materials, and some do not

have money to acquire them, which causes the risk of unstable quality and non-compliance throughout the supply chain.

Packaging restraints were escalated as an important bottleneck. Inexpensive, standard packaging, and sustainability in the environment which satisfy export demands can hardly be found locally, which is one of the possible obstacles to entry into regional and international markets, particularly in companies that have small production capacities.

3. Awareness and Capacity Gaps

The lack of knowledge and awareness regarding EAOPS requirements among all value chain tiers was a cause of anxiety among many companies. Some of them were afraid that little knowledge among farmers, processors, and traders would ensure a lot of non-compliance even post-certification.

Capacity gaps in various critical areas of operations including record keeping, record documentation, quality control and traceability were also identified during workshops. Most of the participants acknowledged that their current systems are manual or inconsistent such that they would find it hard to prove compliance during an audit. The existence of these gaps underscores the importance of a continuous training and mentorship programmes in order to see to it that adoption of EAOPS would be translated into a credible and sustainable implementation.

4. Market Access and Linkages

The other issue that keeps on reemerging is the challenge of finding good organic markets both locally and international. The difficulties most companies expect to face in finding, contracting, and negotiating with reputable buyers, and questions about consistent demand in the market on certified organic products, are likely to exist.

The Fears that were also eminent were those associated with export. The stringent export processes such as traceability, documentation and packaging standards are

seen as likely discouragement to small businesses. In the absence of well-organized assistance in trade facilitation, and in the development of markets of linkages, companies are concerned that the certification may not necessarily translate to better market access and profitability in the market.

5. Operational and Compliance Problems.

Lastly, after adoption, companies are expecting steep operational and compliance-related challenges in their operations. Common challenges noted by us were weak record-keeping and inefficiencies of the production tracking systems. Most of the companies are currently using manual systems which are likely to have errors and inconsistencies and thus traceability between farm and the market is hard to retain now.

Another reason indicated by respondents was the absence of technical expertise to implement and run internal control systems (ICS) to be aligned with EAOPS. This involves difficulties in the tracking of compliance by suppliers, routine audits and reporting returns on investment or profit margins associated with organic production.

In the absence of proper technical support, and advisory services, several companies have the concern that they may not maintain compliance and may suffer loss of their certification and future sales opportunities with time.

Recommendations by the SMEs during the workshops to mitigate anticipated challenges.

Throughout the workshops, the small and medium-sized enterprises (SMEs) in the region exchanged practical long-term suggestions on how to overcome the present and future challenges of adoption and implementation of the East African Organic Products Standard (EAOPS). The concepts indicated a powerful urge to have collective responsibility among the stakeholders, such as government agencies, development partners, the players in the private sector, and the SMEs. The suggested steps are presented below.

1. Mechanisms of Finance and Subsidies.

It was emphasized time and again by all groupings the necessity of financial aid to cover the excessive price of certification and compliance. SMEs proposed that governments and NGOs should create subsidy plans, grants, or cost sharing that will allow certification to be more affordable to smallholder farmers and businesses. Participants focused on directing these mechanisms in the form of agricultural development funds, revolving credit facilities or special organic transition grants to meet audit costs, certification fees and compliance infrastructure. They also demanded low-interest credit products and green investment facilities specific to the organic industry. These kinds of interventions would lower the financial costs, encourage the broader involvement in organic production, and increase trade.

2. Capacity Building, Training and Awareness Creation.

The crucial necessity in the context of creating the continuous training and awareness program concerning EAOPS requirements and compliance procedures was unanimously realized by SMEs. The training must be restricted to record-keeping, traceability, quality control, and sourcing certified inputs- areas which have been found to be a major weakness. The respondents suggested that BvAT, national partners, and government extension services should create modular training, which could be organised in the form of workshops, farmer field schools, or online communication. It should focus on experience-based learning that is practical to make the farmers, processors, and traders internalize organic standards and practices. Also, SMEs suggested awareness programs that would be focused on input suppliers, consumers, and local leaders. These campaigns would take the mystery out of organic certification and create a better sense of ownership and drive among the important players in the value-chain.

3. Enhancing Supply Chains and access to inputs.

Participants highlighted the need to develop resilient and inclusive supply chains that would guarantee supply of certified organic inputs on a regular basis. SMEs proposed that governments and other actors should favour production, distribution, and

marketing of certified inputs locally, like organic fertilizers, seeds, and pest-controlling materials. They demanded incentives to motivate the local entrepreneurs to invest in manufacturing and distribution of inputs so that they were not reliant on imports. The members also asked the stakeholders to standardize affordable packaging solutions that meet export requirements so as to make the locally produced organic products more competitive. Such harmonized initiatives are considered essential to stabilization of supply chains, enhancing a consistency in quality, and ensuring a reduction in the cost of production in the entire organic industry.

4. Digital Solutions are adopted.

The workshops offer a forward-thinking suggestion that will help introduce digital innovations that will facilitate a record-keeping system, traceability, and performance monitoring. Respondents suggested creation of inexpensive software in the form of digital tools or mobile applications to enable SMEs to record products produced, farm data and monitor certification development in real-time. They emphasized on the necessity of less expensive, easy to use systems that could work even where there was limited connectivity as seen in rural locations, making it accessible to farmers and aggregators. Such digital solutions would increase the accuracy, transparency and accountability of the data and would also simplify the audit and certification processes.

5. Creating Partnerships and Linkages in the market.

SMEs emphasized the need of the long-term existence of access to the market to encourage certification and compliance. They propose strategic coordination of producers, exporters, buyers and certifiers to enhance the connection in the market and build visibility of the organic products. Among other recommendations were the establishment of regional trade fairs, organic product and business-to-business (B2B) networking platforms through which producers can meet buyers and certifying bodies face to face. More insights in EAOPS standards and certification advantages to all the market stakeholders would create confidence, enhance coordination, and create new trade possibilities in and out of the area. SMEs also welcomed government facilitation

in trade which involved organic products involvement in export promotion programmes to close the gap between certification and real market adoption.

3.3 Kenyan Findings

Introduction

The assessment of Kenya's organic sector sought to understand the operational landscape, capacity levels, and readiness of companies to adopt and implement EAOPS. The review focused on profiling participating organizations, examining their existing systems and practices, and identifying capacity gaps that hinder compliance and competitiveness. Insights from this analysis provide a foundation for designing targeted interventions to strengthen the organic sector in Kenya and enhance its contribution to sustainable production and trade.

3.3.1 Organization Profile

Out of the anticipated 16 companies, 13 companies participated in the needs analysis in Kenya. On average, the companies have been operating for six (6) years, with the longest established company operating for 13years and the youngest for two (2) years in organic production.

Annual turnover. The average annual turnover for the companies was approximately KES 4,513,279.89 (USD $34,975.9). The company with the highest turnover reported annual revenues of USD $300,000; while the company with lowest turnover reported just USD 800. This wide variation in returns was attributed to differences in product markets, scale of operations, and production capacity. *See table 7 below;*

Table 7. Anonymised Company Dataset with Turnover Categories

Anonymous Identifier	Turnover Range (USD)	Representative Turnover (USD)	Bin Size (n)	Suppressed
Company_2350	5k–20k	15,561.70	5	No
Company_4293	<5k	2,000.00	3	No
Company_9997	5k–20k	9,500.00	5	No
Company_7159	<5k	3,800.00	3	No
Company_2303	Suppressed	—	1	Yes

Anonymous Identifier	Turnover Range (USD)	Representative Turnover (USD)	Bin Size (n)	Suppressed
Company_7287	5k–20k	5,000.00	5	No
Company_0996	20k–100k	20,077.00	4	No
Company_2408	5k–20k	6,448.00	5	No
Company_1449	20k–100k	24,000.00	4	No
Company_2618	<5k	800.00	3	No
Company_5843	5k–20k	7,500.00	5	No
Company_5668	20k–100k	20,000.00	4	No
Company_0168	20k–100k	40,000.00	4	No

Note: *In the above table, company names were pseudonymized, and turnovers were generalized into ranges with slight perturbation. Suppression ("Yes") was applied where fewer than three (3) companies fell into a category, in line with a k-anonymity anonymization model to protect confidentiality while preserving analytical value.*

Engagement with EAOPS: The majority (85%) of organic companies in Kenya had no prior engagement with, or knowledge of EAOPS. The few companies that had engaged with EAOPS were actively involved, including participating in regional management committees.

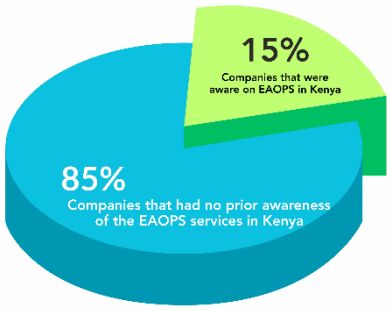


Fig 9: Awareness levels of EAOPS

3.3.2 Existing Capacity Gaps

The survey examined the extent to which organic companies in Kenya had implemented EAOPS, with the aim of identifying specific interventions required at different levels. Findings indicated that the overall knowledge and understanding of EAOPS was basic among most companies, highlighting the need for capacity strengthening interventions.

The assessment responses indicated that most of the organic companies (92%) in Kenya had very weak understanding of EAOPS, had no formal training on organic standards, poor understanding of the EAOPS frameworks, had weak traceability, documentation and internal systems for organic compliance. The study further indicated that 100% of the companies did not understand the EAOPS trade compliance regulations. *See table 8.below*

Table 8: Existing capacity and knowledge for Kenyan Companies

Title	1 = Strongly disagree	2= Slightly disagree	3= Agree	4= Slightly Agree	5 = Strongly agree
1. Staff understand the EAOPS requirements.	92%	8%	0%	0%	0%
2. Our team has received formal training on organic standards	92%	8%	0%	8%	0%
3. We can distinguish EAOPS from EU Organic standards.	92%	0%	0%	0%	0%
4. We understand the EAOPS certification process.	92%	0%	8%	0%	0%
5. We understand the EAOPS compliance requirements.	92%	0%	3%	0%	0%
2. We understand the overall EAOPS framework.	92%	8%	0%	0%	0%
3. We have internal systems for organic compliance (e.g. traceability).	92%	8%	0%	0%	0%
4. We understand trade compliance regulations (e.g. export laws, anti-bribery)	100%	0%	0%	0%	0%

3.3.3 Skills Knowledge Gap Analysis

Table 9 (*below*) shows the main gaps in skills and knowledge of organic companies in Kenya. The results indicate that the majority of the respondent possess an elementary level of competence in the areas of organic trade and compliance. The background level on essential topics that include corporate ethics, awareness of the market, risk management, export compliance, documentation processes, and the EAOPS structure were all exhibited by all participants (100 %). These and other insights highlight the reality that much-needed organized training and specific capacity building interventions are necessary that would lead to increased compliance, better efficiency in operations and competitiveness of the organic industry.

Table 9: Skills and Knowledge gap analysis

Tenet/ Knowledge area	Skills and knowledge level rating				
	Not competent	Basic	Elementary	Intermediate	Advanced
1. EAOPS framework	0%	100%	0%	0%	0%
2. Organic production and post-harvest handling	0%	77%	0%	33%	0%
3. Documentation for organic certification	0%	100%	0%	0%	0%
4. Export compliance laws and trade regulation	0%	100%	0%	0%	0%
5. Risk management in trade compliance	0%	100%	0%	0%	0%
6. Traceability and record-keeping system	0%	92%	0%	8%	0%
7. Market demands and trends for organics	0%	100%	0%	0%	0%
8. Gender and youth integration in value chains	0%	0%	0%	31%	69%
9. Internal control systems (ICS) for compliance	0%	84%	0%	8%	8%

10. Corporate culture and ethics in organic trade	0%	100%	0%	0%	0%

Skills and Knowledge Level Rating Descriptors.

To aid in the interpretation of the results of the assessment (*Table 9 above*), the following descriptions are made of what a rating level indicates. The ratings address the skills and knowledge of the respondents in regard to the EAOPS and trade requirements associated with this standard.

Level	Descriptor	Description of Competence
Not Competent	No Awareness or Understanding	The respondent has no exposure or understanding of the concept or practice. They are unable to apply or relate it to organisational functions or trade processes.
Basic	Foundational Awareness	Demonstrates limited awareness of the concept, with minimal practical application. Knowledge is largely theoretical or fragmented, and respondents require close supervision or external support to perform related tasks.
Elementary	Developing Understanding	Shows growing familiarity with the concept and can perform simple, guided tasks. However, understanding remains partial and application inconsistent across operational areas.
Intermediate	Functional Proficiency	Possesses a sound working knowledge of the concept and can apply it with moderate independence. Demonstrates the ability to integrate the knowledge area into operational processes, although occasional technical support may still be required.

Advanced	Comprehensive Expertise	Exhibits in-depth understanding and consistent application of the concept across all relevant functions. Capable of providing guidance to others, leading training, and enhancing organisational systems based on best practices.

Insights from the above Knowledge Gap Analysis

The findings highlight substantial knowledge gaps among organic companies in Kenya across critical EAOPS-related areas. All the companies demonstrated only basic knowledge in key domains such as the EAOPS framework (100%), documentation for certification (100%), export compliance (100%), risk management (100%), and corporate culture in organic trade (100%). This suggests a limited preparation for effective adoption and compliance with organic standards. Notably, while 77% of the companies reported basic knowledge in organic production and post-harvest handling, a small proportion (33%) had intermediate capacity, suggesting emerging but limited technical expertise. Similarly, traceability and record-keeping systems showed slight variation, with 92% at basic level and 8% at intermediate level.

Encouragingly, the integration of gender and youth in value chains presented a stronger capacity profile, with 69% of companies at advanced level and 31% at intermediate, pointing to an area of relative strength. Internal control systems for compliance remained weak, with 84% at basic level, highlighting the need for institutional strengthening.

Overall, the findings indicate that while companies exhibit foundational awareness, critical capacity-building interventions are required to bridge the knowledge gaps, particularly in compliance, documentation, and trade regulation. Also, *See fig 10 below:*

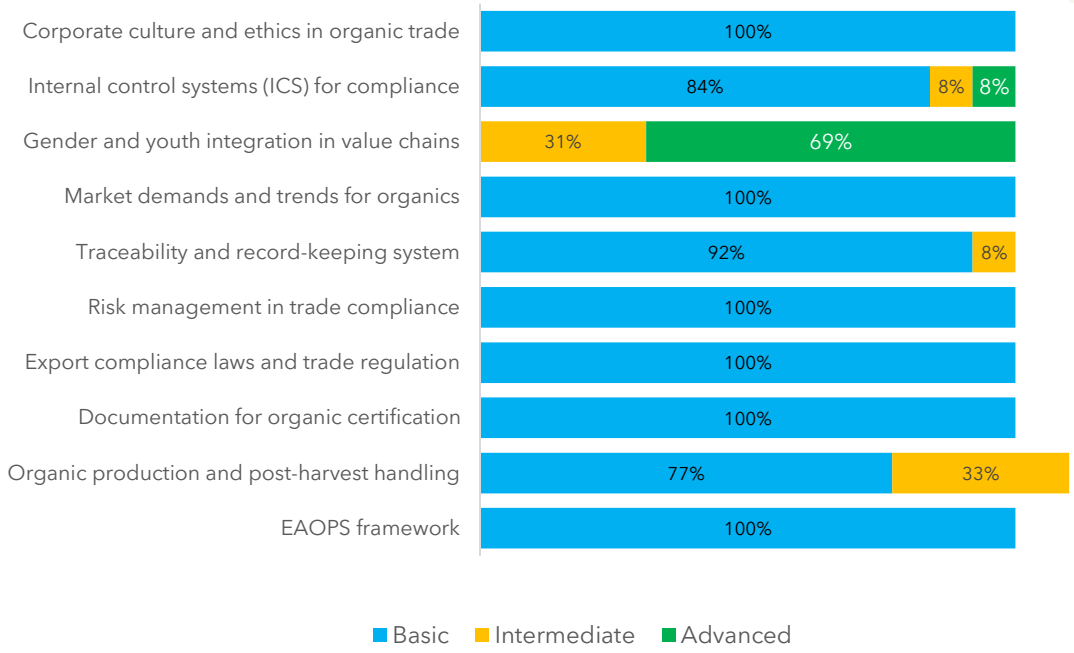


Fig10: Organic Companies' knowledge and skills gap analysis

3.3.4 Learning Approaches

This has been determined to be different with organic firms in Kenya in terms of production, processing, and sales. They include smallholder groups and meditor export businesses. None of them had been formally trained in organic trade, the EAOPS, and certification procedures. This gap in training restricts compliance, quality assurance and regional and international market of high value. In the workshops, companies discussed their deficiencies and learning priorities openly gather during the FGDs. They identified a number of areas where intervention is required. The recommendations that came out include:

a) Law-abiding and regulation.

Businesses insisted on extensive training of processes of organics certifications, national and regional laws, and access to the market on an international level. Most respondents indicated that the certification environment is tricky particularly to the smallholder-based enterprises that do not have technical advice. The essential training is necessary on how to interpret and apply EAOPS clauses, documentation, and audit procedures, to facilitate compliance and lower the risk of certification.

b) Value Addition

One such common theme was the necessity to improve the quality of products and their competitiveness by means of improved processing, packaging, and labelling. Some companies claimed that their products do not usually obtain premium prices due to inadequate presentation, lack of shelf appeal or failure to meet standards of export packaging. They suggested practical education about value-breaking methods, quality control and packaging styling as per the market and the organic trading rules.

c) Creative Product Development.

The participants realized that innovation and diversification is the future of organic trade. The companies are interested in knowing how to produce new organic products lines like fortified foods, herbs, and natural cosmetics that are responsive to changing consumer trends. Market driven innovation, product differentiation and adjustment to the new consumer tastes require training to increase market share and sector strength.

d) Positioning of Markets Brands.

Marketing and brand positioning is another training area that was identified as a high priority. Businesses realized that most of the Kenyan organic products were still poorly branded and unseen in the domestic and export market. The development of training

in the field of brand development, the craft of storytelling, and digital marketing was proposed to assist the companies convey the special value of their products, the trust of consumers, the creation of strong and recognizable brands, which may be competitive at both regional and global levels.

e) Operational Skills

FGDs showed lack of information in business operations particularly on financial matters, record keeping and documentation. The participants observed that compliance and sustainability in the long-term are negated by weak administrative systems. Thus, they advised basic bookkeeping, financial literacy, and computerized documentation system training on supporting traceability, accountability, and informed decision-making. These recommendations reflect a strong demand to have organized and layered capacity-building programmes which integrate technical, managerial and entrepreneurial training. These interventions will enable organic firms to match with the EAOPS, enhance efficiency in production and competitiveness in the regional and international markets of organic products.

Mode of Training

The survey was also conducted on the desired learning styles in order to make future training to respond to the reality of companies. Results indicated that face-to-face workshops were most desirable with 85% of the companies selecting the option. According to the participants, physical workshops provide the opportunity to interact, learn with peers, and deal directly with trainers- they are key factors in understanding technical material and gaining confidence. Mentorship and coaching were also most preferred by almost half of the firms (46%). They appreciate individualised and continuous service of trained professionals or licensed firms. These arrangements are used to fill the gap between theory and practice in the implementation of certification processes, internal control systems and market linkage strategies.

Conversely, the virtual environment was the least favored method of a session with a mere 8% of the answer being online, which demonstrated a rather low level of digital literacy and unstable internet access in certain regions. Although virtual learning may be cost effective, the results indicated that blended learning, which integrates physical and computer based elements, may help enhance the adoption and sustainability of capacity building initiatives in the sector overtime. *See Fig 11 below.*

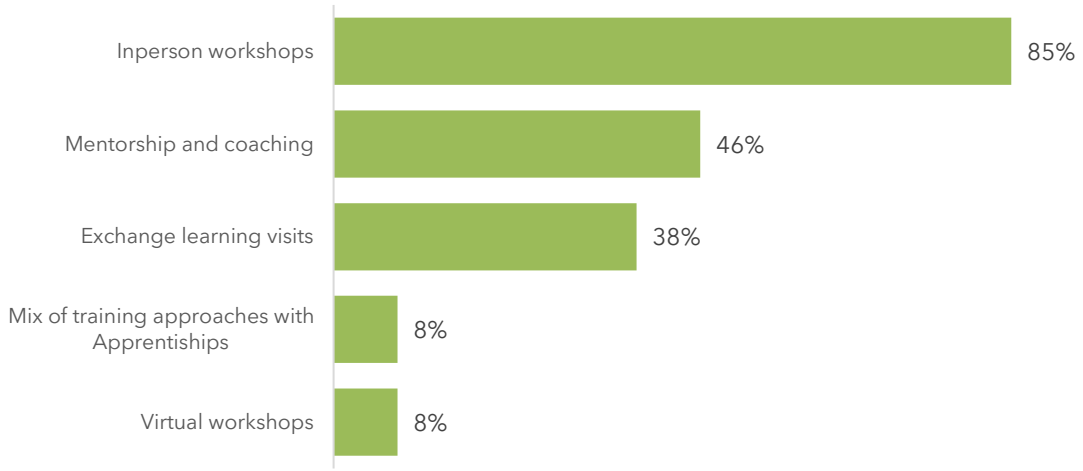


Fig11: Preferred mode of training companies in organic sector

These results highlight a strong preference for interactive and practical training models, with limited uptake of digital learning platforms, suggesting the need for blended approaches that balance accessibility with effectiveness.

E: Barriers

The evaluation indicated that the usage and implementation of EAOPS in the context of organic firms in Kenya were limited by a number of factors. The biggest concern was the ignorance of EAOPS as reported by 97 percent of the companies. Complexity and ambiguity of standard (95%) and limited internal capacity to meet the requirements (94) followed this in that order.

Also, 89 percent of the businesses mentioned challenges in finding certified inputs or service providers, which was an additional limitation to compliance. Despite the widely accepted significance of including gender and youth in the certification process, 35% of the companies said that they experience difficulties in encompassing gender and youth inclusion in their operations. Besides, 58 percent of the firms had disjointed and poor supply chain networks, a situation that had adverse effects on the efficiency of production and market preparedness *See Fig 12 below.*

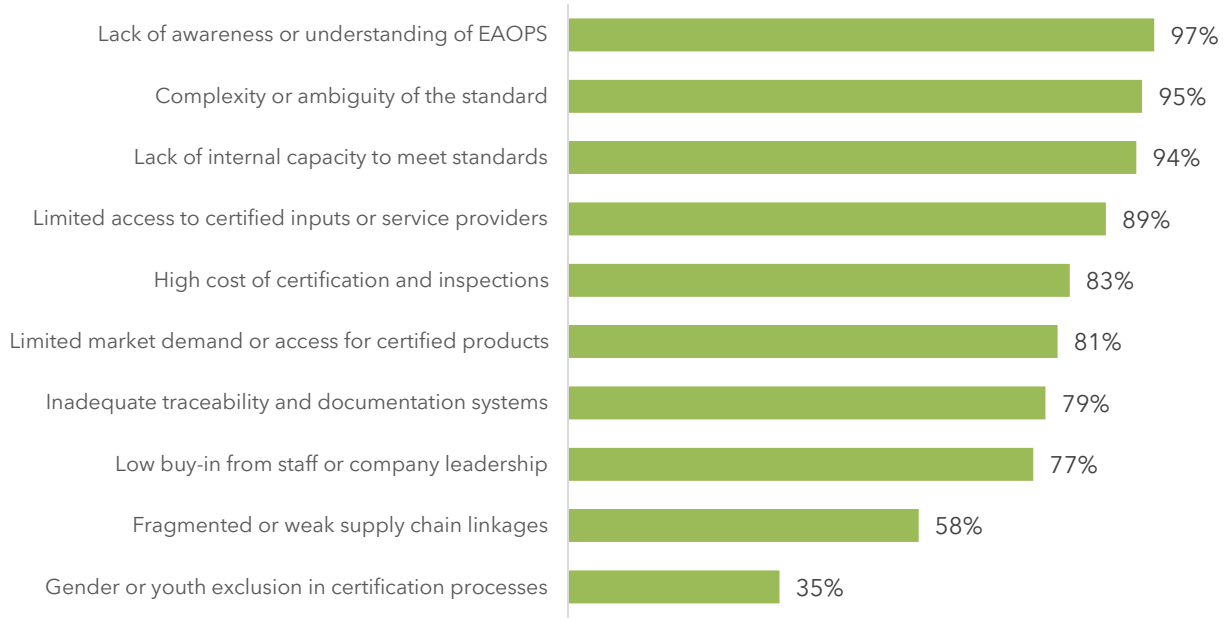


Fig 12: Key challenges to adopting and implementing EAOPS

The above findings underscore the need for capacity building, streamlined compliance processes, and strengthened supply chain systems to support successful EAOPS adoption in Kenya.

Trade compliance barriers facing organic companies in Kenya:

The assessment revealed that organic companies in Kenya were largely non-compliant with EAOPS requirements, due to both internal and external factors influencing the production. The most significant impediment was the high cost of meeting the legal

requirements as indicated by 92% of the organic companies. However, the challenge was not limited to cost alone. The survey established that 85% of the companies lacked adequate understanding of export laws and tariffs while 77% of the companies struggled to access updated regulatory information.

Other barriers included: Limited systems leading to risk of non-compliance (62%), unethical practices, such as corruption in trade processes (38%); and fear of penalties or audits due to non-compliance (31%). *See Fig 13 below.* The assessment further revealed that organic companies in Kenya face significant internal organizational challenges that hinder their ability to adopt and comply with EAOPS. The most pressing issues include: the absence of clear compliance policies (100%), and the lack of dedicated compliance staff or officers, highlighted by 84% of the respondents. Additionally, poor record-keeping practices were noted by 77% of the companies, while 46% cited minimal investment in staff training as a barrier to compliance. Collectively, these gaps underscore weak institutional structures and Limited human capacity, both of which contribute to the slow pace of EAOPS adoption and limit effective participation in regional organic trade.

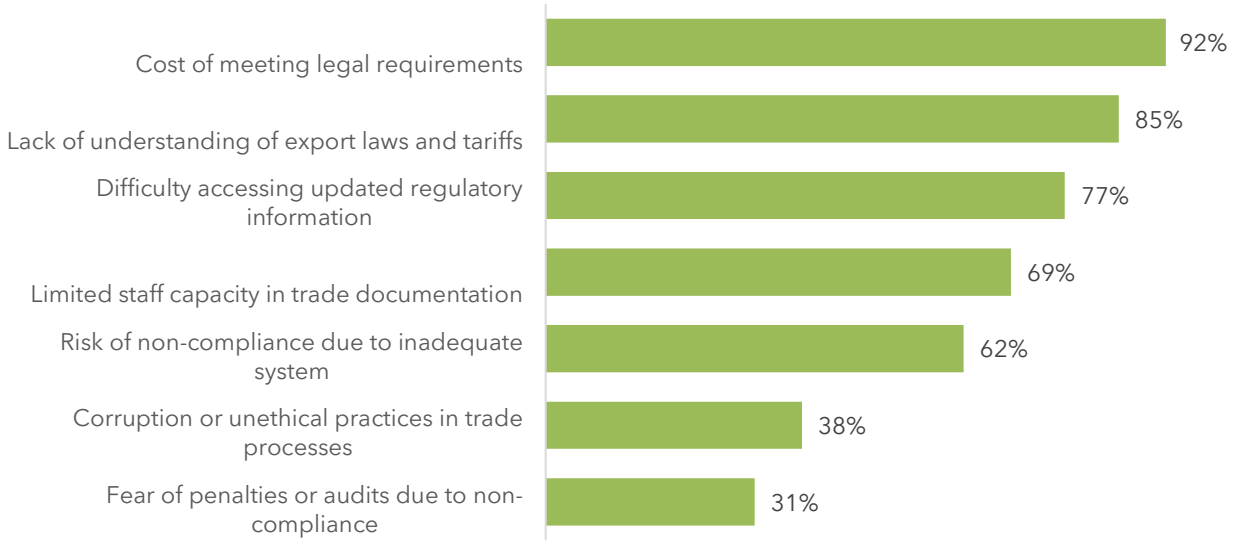


Fig 13: Barriers to trade compliance for organic companies in Kenya

In solving these challenges, the companies requested specific support. Financial support or subsidies to allow covering the expensive certification stood as the most commonly requested. This need was unanimously agreed by all the participants in the workshop. Their other priority was the technical training of organic standards. It was important to provide the digital traceability and documentation tools. Sixty two percent of the businesses reported that such steps would highly enhance their capacity to comply as well as boost operational efficiency. Other areas of support included peer exchange and regional knowledge-sharing platforms (46%), mentorship and coaching from experienced companies (23%), and trade compliance and policy guidance training (24%). Additional support needs identified were linkages to certified input suppliers and service providers (16%), simplified EAOPS guidelines and visual materials (16%), and staff awareness-raising sessions to organic trade compliance (8%). A cross-cutting request was also made for support in influencing policy implementation to create a more enabling environment for compliance. *See Fig 14 below*

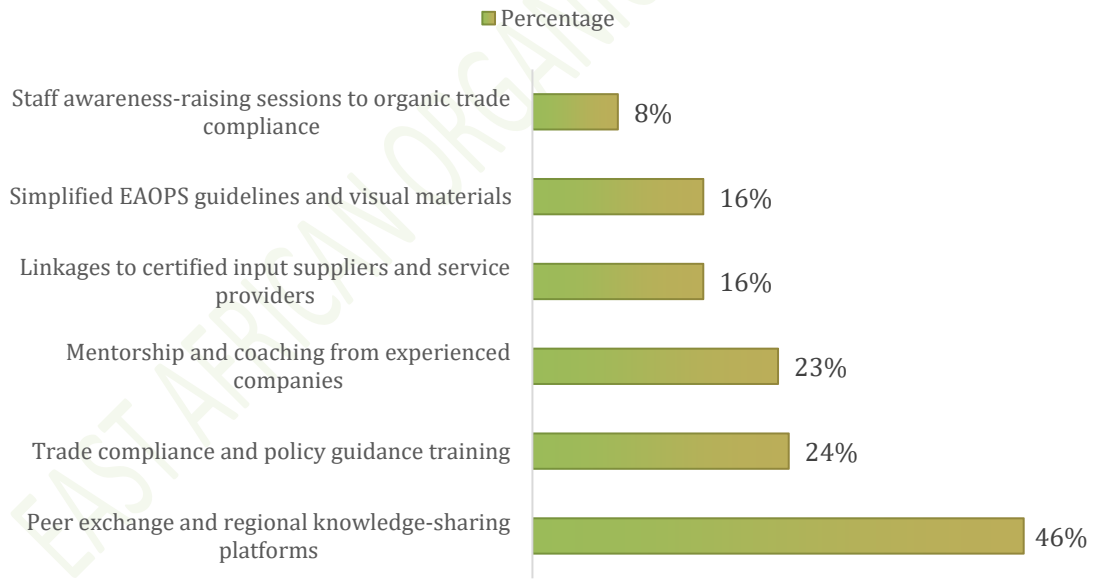


Fig 14: Priority Areas of Support and Identified Needs

Overall, the findings highlight that the organic companies in Kenya require a combination of financial assistance, technical capacity-building, and digital

innovations, complemented by peer learning and simplified guidance materials, to strengthen their internal readiness and effectively adopt EAOPS.

The common barriers faced by organic companies in Kenya in adopting and implementing EAOPS were:

1. *Financial constraints in the organic production sector:*

The assessment identified financial constraints as one of the most critical barriers hindering the adoption and implementation of EAOPS among organic companies in Kenya. A key challenge was low financing, with many companies struggling to secure adequate resources to invest in certification, purchase organic inputs, and upgrade infrastructure necessary for compliance. Access to external financial support such as loans, grants, or investment was reported as difficult, and where loans were available, the high interest rates reduced their viability and limited opportunities for scaling organic production. Furthermore, the high costs associated with organic certification and compliance emerged as a major impediment, particularly for small and medium-sized enterprises (SMEs), which often lack the financial capacity to meet international organic standards. These financial barriers collectively undermine companies' ability to transition smoothly into full compliance with EAOPS and to effectively participate in regional and global organic markets.

2. *Low level of technical capacity and expertise*

The second major barrier identified was the low technical capacity and expertise among organic companies in Kenya. A significant gap exists in training on EAOPS, with many farmers and businesses lacking knowledge of organic farming best practices, certification procedures, and export market requirements. Even among those with some awareness, adoption and implementation of the practices remain limited due to Limited motivation and self-drive. The assessment also highlighted that limited financial literacy and poor bookkeeping skills contribute to weak financial management, thereby affecting sustainability and restricting access to potential

funding opportunities. Furthermore, there is a strong need for Technical Assistance (TA) and tailored coaching, particularly in areas such as organic production methods, post-harvest handling, and export logistics. The absence of adequate advisory services leaves many companies ill-equipped to effectively comply with EAOPS, creating a persistent knowledge and capacity gap that hinders the growth and competitiveness of the organic sector in Kenya.

3. *Market & Production Challenges*

The third set of barriers relates to market and production challenges. Many organic companies in Kenya operate on a low production scale, which limits their ability to meet both domestic and international market demand. In addition, the adoption of fully organic practices remains low, with many farmers transitioning only partially from conventional systems due to concerns over yield risks and the absence of sufficient incentives to cushion them during the transition period. Unstable and fragmented market linkages further compound the challenge, as weak connections with international buyers and Limited access to market information restrict the competitiveness of organic products. *See Fig 15 below;*

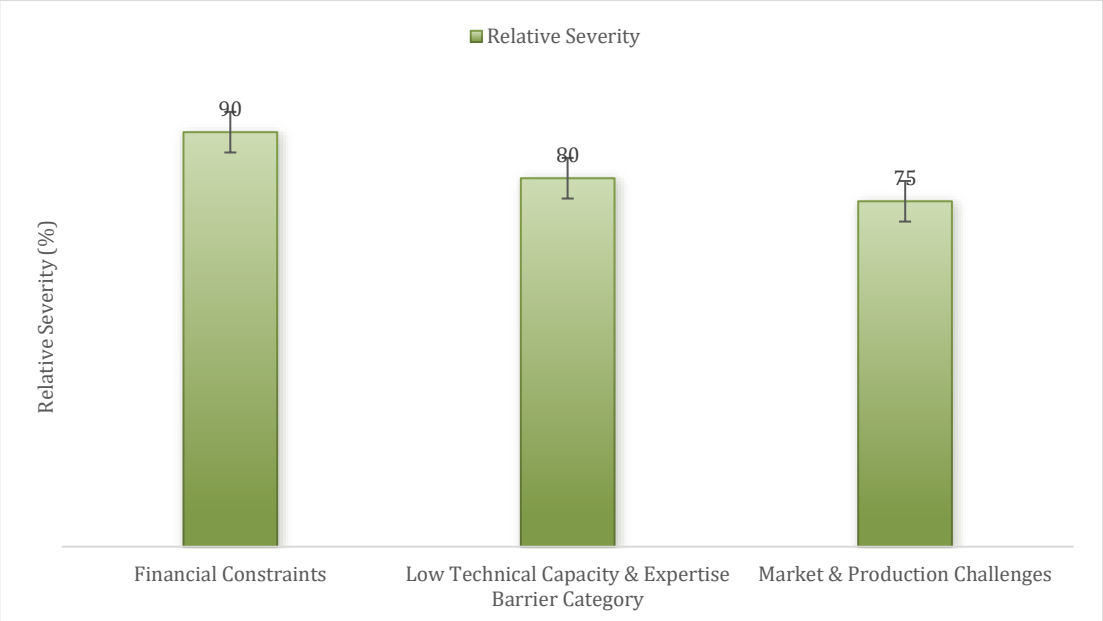


Fig 15 Key Barriers to Adoption & Implementation of EAOPS Among Organic Companies in Kenya.

Despite these gaps, the assessment found that most producer companies had some systems and structures in place, providing a foundation for strengthening compliance mechanisms.

The needs assessment survey further revealed the specific capacity strengthening areas required to overcome these challenges, highlighting the necessity for targeted interventions to support production growth, enhance adoption of certified organic practices, and strengthen market integration for organic companies in Kenya. *See table 10 below.*

Table 10: Needs of the companies to comply with EAOPS and regional organic trade laws

Organic Company	Support required for the company to comply with EAOPS and regional trade laws.
1. Yatta Multipurpose Farmers' Cooperative Society Ltd	Financial support or subsidies for certification Capacity building on organic standards
2. Forkel Farm Africa Ltd	Financial support or subsidies for certification Capacity building on organic standards
3. Soil Doctors	Financial support or subsidies for certification Capacity building on organic standards
4. KIYA Initiative (Kisumu Young Agripreneurs)	Financial support or subsidies for certification Capacity building on organic standards
5. KOFAR Kenya Ltd	Financial support or subsidies for certification Capacity building on organic standards Strengthening systems and structures for peer-exchange and knowledge sharing
6. Farm Share Kenya Ltd	Financial support or subsidies for certification

	Capacity building on organic standards Technical assistance to grow the company
7. Sirgoi WRUA	Financial support or subsidies for certification Capacity building on organic standards
8. Kitui Mt. Processor company Ltd	Financial support or subsidies for certification Capacity building on organic standards
9. Mesheddy poultry farm	Capacity building on organic standards Value addition
10. Fine Aromas of Kenya	Capacity building on organic standards Product development
11. Bunyala Agri climate Ltd	Financial support or subsidies for certification Capacity building on organic standards Technical assistance on company's organic production Strengthening of peer-exchange and knowledge sharing systems
12. Pat Organixs	Financial support or subsidies for certification Capacity building on organic standards Technical assistance to upscale production Support to establish systems and structures.
13. Camlpo Ltd	Capacity building on organic standards Value addition

3.4: A summary of challenges and needs from the three countries

The Training Needs Assessment conducted in Kenya, Uganda, and Tanzania highlights a diverse range of capacity gaps across the organic value chains. While several needs were unique to specific country contexts, many overlapped, underscoring common challenges within the region. The T*able 11* (below) shows a consolidated list of the training needs and topics identified in each country;

Table 11: Training needs and topics identified in the assessment

Kenya	Uganda	Tanzania
Documentation for organic certification	Documentation for organic certification	Documentation for organic certification
Traceability systems for compliance	Traceability systems for compliance	Traceability systems for compliance
Record-keeping requirements for internal and external use	Record-keeping requirements for internal and external use	Record-keeping requirements for internal and external use
Tools for records management	Tools for records management	Tools for records management
Digital tools for traceability and documentation	Digital tools for traceability compliance	Digital tools for traceability and documentation
Market access and export procedures	Market access and export procedures	Market access, export procedures and standard guidelines
Returns on investment Value addition	Returns on investment Innovative product development	Returns on investment Value addition and innovative product development
Certification requirements	Certification requirements	Machinery for organic processing (SMEs)
Organic standards and regulations	Regional knowledge-sharing and peer exchange	Vegetable processing requirements

Kenya	Uganda	Tanzania
Advocacy, communication and policy engagement	Advocacy, communication and policy engagement	Meeting regional market demands and competitiveness
Branding and marketing strategies	Branding and marketing strategies	Internal Control Systems (ICS) for compliance
Financial literacy, documentation and reporting	Financial literacy and reporting	Corporate culture and ethics in organic trade
Gender and youth integration	Gender and youth integration in organic value chains	Engagement with policy institutions and trade bodies
Regional and inter-country knowledge-sharing	Regional and inter-country knowledge-sharing	Regional and inter-country knowledge-sharing
Strengthen governance structures for compliance	Strengthen governance structures for compliance	Strngthen governance structures for compliance

3.4.1 Findings – Country Comparative Analysis

The comparative analysis of training needs across Kenya, Uganda, and Tanzania reveals a complex landscape of both convergence and divergence in capacity gaps. These patterns mirror the countries' varying levels of maturity in organic value chain development, institutional frameworks, and market integration. While the three countries share common foundations of awareness on the importance of organic certification and compliance, their progression along the capacity continuum differs markedly, shaped by contextual realities, policy environments, and institutional capacities.

i) Shared patterns across countries

Across all three countries, the assessment established a strong regional consensus on the pivotal role of documentation, traceability, and record-keeping systems in ensuring compliance with organic certification standards. Respondents consistently acknowledged that proper documentation is not only a procedural requirement but a strategic business asset, strengthening credibility with certifiers, improving consumer trust, and enhancing competitiveness in domestic and export markets.

However, the practical ability to operationalize these systems remain limited. Producers and processors in all three countries reported weaknesses in maintaining systematic records, using digital or automated traceability tools, and linking compliance documentation with commercial performance indicators such as cost-efficiency and returns on investment. This signals a widespread need for capacity-building interventions that go beyond theoretical training to emphasize hands-on, context-relevant, and technology-enabled learning.

Another shared finding was the emphasis on market access and business competitiveness. Across Kenya, Uganda, and Tanzania, participants identified difficulties in meeting export compliance requirements, understanding market dynamics, and positioning organic products competitively. Training priorities therefore extended beyond certification to include branding and marketing strategies, value addition, innovative product development, and financial literacy for sustainability. The latter reflects a growing recognition that organic certification, while essential, must be anchored within commercially viable business models.

In addition, the integration of gender and youth into organic value chains emerged as a cross-cutting training theme. Respondents recognized that empowering women and young people would not only promote equity but also strengthen enterprise resilience and innovation in the organic sector. Similarly, regional knowledge-sharing platforms

and peer learning exchanges were widely supported as mechanisms to accelerate capacity transfer and harmonize practices across the East African region.

Finally, respondents across all countries underscored the importance of strengthening governance and institutional frameworks for compliance. Weak governance structures—especially at cooperative and SME levels—were cited as barriers to achieving consistency, accountability, and transparency in organic operations. Hence, the demand for training on corporate ethics, accountability mechanisms, and internal control systems (ICS) featured prominently throughout the assessment.

ii) Country-specific nuances

1. Kenya

Kenya demonstrated a comparatively advanced level of awareness and engagement with the East African Organic Products Standard (EAOPS) and related certification frameworks. Several Kenyan enterprises have either achieved or are pursuing organic certification, indicating steady progress towards structured compliance. However, persistent capacity gaps were observed in post-harvest handling, value addition, and quality assurance, where deficiencies in infrastructure, knowledge, and skills continue to limit competitiveness.

The country's stakeholders expressed particular interest in strengthening returns on investment, branding and marketing strategies, and innovative product development. These priorities suggest that Kenya's organic enterprises are transitioning from a compliance-driven phase to a market expansion and differentiation stage, where the focus is on improving quality, packaging, storytelling, and consumer trust.

Kenyan respondents also highlighted a strong need for advocacy and communication skills to enable the organic sector to engage effectively with policymakers and to influence supportive legislation. This reflects a maturing ecosystem where enterprises increasingly appreciate the interplay between private sector growth and an enabling

policy environment. Overall, Kenya's training needs point towards deepening technical sophistication, market positioning, and strategic advocacy.

2. Uganda

Uganda's organic sector continues to play a pivotal role within the regional organic movement, with a well-established base of certified producers and processors. Yet, the assessment revealed structural and institutional bottlenecks that hinder consolidation and scaling. Chief among these are challenges related to compliance management, corporate governance, and Internal Control Systems (ICS).

Participants identified an urgent need for practical, field-oriented training on certification processes, ICS implementation, and corporate ethics in organic trade. The emphasis on ethics indicates recognition that organic integrity extends beyond product quality to the transparency and accountability of organizational conduct.

Furthermore, Uganda's respondents demonstrated a heightened demand for advocacy, communication, and policy engagement training, noting that fragmented policy frameworks and inconsistent enforcement across agencies have slowed sectoral development. Calls for regional and inter-country knowledge-sharing reflected a strong appetite for mutual learning and standard harmonization, reinforcing Uganda's potential role as a regional hub for capacity development in organic certification and policy dialogue.

3. Tanzania

In contrast, Tanzania's findings highlighted a relatively nascent stage of development in organic trade. The majority of stakeholders reported limited awareness of EAOPS, with only one enterprise confirmed as fully compliant. This underscores the need for foundational sensitisation and introductory training on organic principles, certification standards, and record-keeping.

Tanzania's training priorities leaned towards documentation and traceability, post-harvest handling, and vegetable processing requirements, alongside practical guidance on machinery for organic processing. These reflect the sector's strong agricultural orientation and the prevalence of smallholder-driven enterprises with limited access to formalised systems.

A further distinctive feature of Tanzania's assessment was the strong interest in understanding market demands and competitiveness within the regional context. This indicates a willingness to engage in cross-border trade once foundational capacity is established. In essence, Tanzania's training needs point to an early-stage ecosystem that requires basic technical grounding, institutional awareness, and strategic support to transition towards structured organic trade participation.

iii) Comparative insights

Overall, the assessment affirms that while Kenya, Uganda, and Tanzania share common objectives in building compliant, market-ready organic enterprises, their trajectories and immediate priorities vary substantially.

- Kenya represents a maturing organic ecosystem moving from certification to competitiveness, with its training needs clustered around advanced business skills, value addition, and advocacy.
- Uganda occupies an intermediate stage, consolidating its institutional systems and seeking coherence across compliance, governance, and policy advocacy frameworks.
- Tanzania, by contrast, is in an emergent stage, requiring foundational awareness creation, technical training, and institutional strengthening to establish basic compliance capacity.

The comparative analysis underscores the need for a tiered regional capacity-building framework that responds to these different stages of sectoral evolution. Such a framework should combine:

- Regional harmonisation of knowledge and certification practices through peer learning and policy dialogue;
- Country-specific training modules that align with national realities and enterprise maturity levels; and
- Cross-cutting support for digitalisation, governance strengthening, and inclusive participation of women and youth.

Together, these interventions would create a balanced ecosystem where each country contributes uniquely to the collective advancement of the East African organic sector; positioning the region as a credible, competitive, and ethically grounded player in the global organic marketplace.

3.4.2 Cross-Country and Country-Specific Training Needs

(a) Regional and Cross-Cutting Training Needs

TNA conducted across Kenya, Uganda, and Tanzania revealed a set of capacity gaps that are common throughout the region. These shared weaknesses highlight the urgent need for harmonised, regionally coordinated training interventions to strengthen compliance with EAOPS and to enhance the competitiveness of organic enterprises.

i) Documentation and Record-Keeping for Organic Certification

In all three (3) countries, limited understanding and poor practices in documentation, record-keeping, and data management emerged as key barriers to certification. Many companies lack standardised systems for maintaining traceability records, audit documentation, and certification evidence. These deficiencies undermine audit readiness, constrain market access, and increase the risk of non-compliance with EAOPS and international organic standards. Strengthening capacity in systematic documentation, including digital filing and data reporting, is therefore a top regional priority.

ii) Traceability Systems and Digital Solutions

Stakeholders in Kenya, Uganda, and Tanzania unanimously recognised the need for training on traceability systems and digital tools to streamline compliance processes. Many companies continue to rely on manual methods of tracking production and sales, which limits transparency and efficiency. Introducing user-friendly digital platforms and mobile-based applications could transform record-keeping, enhance traceability from farm to market, and build trust among buyers and certifiers. Training should therefore focus on practical skills in using digital tools and software that facilitate monitoring, evaluation, and reporting.

iii) Market Access and Business Development

A major shared need across the region relates to strengthening entrepreneurial and business management skills. Most organic enterprises struggle to position their products competitively in domestic and international markets. Training in branding, value chain analysis, market positioning, pricing strategies, and export logistics was widely cited as essential. Additionally, mentorship and coaching in negotiation, customer relations, and market intelligence were highlighted as effective approaches for bridging this gap and enabling SMEs to access premium organic markets sustainably.

iv) Financial Literacy and Reporting

Across all three countries, low financial management capacity was found to be a significant constraint. Weak bookkeeping practices, limited understanding of financial planning, and inadequate reporting systems hinder companies' ability to secure financing and to meet certification requirements. Targeted training in budgeting, financial documentation, cost-benefit analysis, and reporting for both compliance and business growth is therefore crucial for strengthening enterprise resilience and sustainability.

v) Gender and Youth Integration

The TNA also revealed a strong regional consensus on the need to deepen gender and

youth inclusion in organic value chains. Despite existing efforts, women and young people remain underrepresented in leadership and entrepreneurial roles within the sector. Training should therefore focus on integrating gender-sensitive and youth-responsive approaches in production, marketing, and decision-making. This would not only promote equity but also ensure the long-term sustainability and dynamism of the organic movement in East Africa.

vi) Advocacy, Communication, and Policy Engagement

Stakeholders across Kenya, Uganda, and Tanzania expressed the need to strengthen advocacy and communication competencies. Many actors lack the capacity to effectively engage policymakers, articulate the value of organic trade, or influence regulatory frameworks. Training in policy engagement, strategic communication, and public awareness campaigns would therefore be instrumental in enhancing collective advocacy for the adoption and implementation of EAOPS at both national and regional levels.

(b) Country-Specific Training Needs

1. Kenya

Kenya's organic sector demonstrated comparatively advanced awareness of EAOPS and a growing number of certified enterprises. However, significant skill gaps persist in post-harvest handling, value addition, and product differentiation. The country's key priorities include:

i. Value addition and innovative product development to enhance competitiveness and meet export standards.

ii. Branding and market visibility strategies to increase consumer awareness and expand market reach.

iii. Strategic communication and policy advocacy to influence national policy reforms and promote organic products among consumers and policymakers.

Kenya's training focus therefore lies in advancing high-value market positioning and reinforcing its leadership role in the regional organic trade ecosystem.

2. Uganda

Uganda exhibits strong potential for organic trade but faces structural challenges related to compliance and institutional governance. The country's priorities revolve around:

i. Strengthening Internal Control Systems (ICS) for certification and compliance monitoring.

ii. Enhancing corporate ethics, accountability, and transparency within the organic trade system.

iii. Policy harmonisation and advocacy skills development, aimed at influencing national and regional policy frameworks to support the organic sector.

Stakeholders also expressed a strong interest in regional peer-learning and exchange programmes, enabling Ugandan enterprises to learn from the experiences of more advanced organic markets within and beyond East Africa.

3. Tanzania

Tanzania's organic sector remains in the early stages of EAOPS adoption, reflecting both limited awareness and weak institutional support. Accordingly, its training priorities are largely foundational, focusing on:

i) Basic sensitisation on EAOPS and organic standards to build awareness and understanding.

ii) Training on documentation and record-keeping as a prerequisite for compliance and certification.

iii) Value addition and vegetable processing techniques to increase market readiness and reduce post-harvest losses.

iv) Engagement with policy institutions and trade bodies to promote organic governance and representation at national and regional levels.

Tanzania's pathway therefore begins with awareness creation and progressive capacity development to nurture a functional and sustainable organic ecosystem.

(c) Summary

The findings highlight that, while documentation, compliance, and market access are universal training priorities across Kenya, Uganda, and Tanzania, the intensity and nature of these needs differ significantly.

i. Kenya is primarily focused on market expansion, branding, and policy advocacy, building upon its relatively mature organic ecosystem.

ii. Uganda prioritises institutional strengthening, governance, and advocacy, aiming to consolidate and formalise its organic structures.

iii. Tanzania, by contrast, requires foundational training and awareness creation, serving as the entry point for expanding the country's engagement with EAOPS.

This differentiation underscores the need for a tiered regional capacity-building strategy; one that combines standardised modules on EAOPS compliance with customised country-specific interventions. Such an approach will ensure equitable progress across the region, strengthen cross-country collaboration, and accelerate the collective advancement of the East African organic sector toward sustainability, competitiveness, and inclusive growth.

3.5 Clustering the training needs into modules using Kawakita Jiro Methodology

The Kawakita Jirō (KJ) Method, also known as affinity diagramming, was applied to cluster the diverse training needs identified across Kenya, Uganda, and Tanzania into coherent thematic categories. This approach was particularly suited to the heterogeneous dataset, which ranged from technical issues such as record-keeping and certification to broader themes like policy engagement and gender integration.

Through systematic grouping of related items, the KJ Method allowed training needs to be organized according to natural affinities rather than pre-determined frameworks. For instance, documentation, traceability, and record-keeping were clustered into one category as they collectively addressed information management for compliance. Similarly, topics on market access, branding, and financial literacy were combined under entrepreneurial and commercial capacity.

The workshops participatory process, involving 48 stakeholders from producer companies, processors, certifiers, and policy actors, ensured that the clusters reflected lived realities, thereby enhancing both validity and ownership. Importantly, the KJ Method enabled regional harmonization while retaining country-specific sub-topics; for example, Tanzania's vegetable processing needs were included under the broader Production cluster. *See the Table 12 with the five (5) clusters of titles and sub-topics for the training modules:*

Table 12: Master Table; Training Modules and Sub-Topics

Cluster	Sub-Topics
1. Documentation, Traceability & Record-Keeping	•Documentation for organic certification • Record-keeping requirements • Traceability and record-keeping systems • Tools for records management • Digital tools for traceability and documentation • Returns on investment and profit margin tracking
2. Compliance, Certification & Standards	• Understanding EAOPS framework, requirements, and compliance • EAOPS vs EU organic standards • Organic standards & regulations • Export compliance laws and trade regulations • Trade compliance training and policy

Cluster	Sub-Topics
	guidance • Internal Control Systems (ICS) for compliance • Corporate culture and ethics in organic trade • Governance structures for compliance
3. Production, Post-Harvest & Value Addition	• Organic production best practices • Post-harvest handling • Nutrient content standardization and concentration • Quality control measures and standard guidelines • Value addition to enhance product value • Innovative product development • Recommended machinery for organic processing • Vegetable processing requirements • Meeting regional market demands and competitiveness
4. Market Access, Branding & Business Development	• Market demands and trends for organics • Organic product export procedures • Market linkages and branding strategies • Brand positioning for organic markets • Access to certified input suppliers and service providers • Mentorship/coaching and peer exchange platforms • Financial literacy, documentation, and reporting for sustainability
5. Communication, Advocacy & Policy Engagement	• Communication of EAOPS benefits to stakeholders • EAOPS awareness-raising sessions for staff,

Cluster	Sub-Topics
	farmers, and processors • Simplified guidelines or visual materials on EAOPS • Gender and youth integration in value chains • Advocacy for policy implementation and harmonization • Regional and inter-country knowledge-sharing • Engagement with policy institutions and trade bodies

Summary

The clustering of training needs into five (5) categories represented a systematic and evidence-based approach to transforming a diverse dataset into a coherent training framework. Each cluster captured a distinct yet interconnected dimension of the organic value chain: information management and accountability (Documentation), regulatory compliance and certification (Compliance), production and value addition (Production), competitiveness and entrepreneurship (Market Access), and systemic influence through stakeholder engagement (Communication).

Together, these categories provided a holistic framework for capacity-building in the East African organic sector. They addressed both the technical competencies required for certification and trade, and the enabling soft skills needed to advocate, communicate, and compete effectively. This integrative approach ensured that training interventions would not only close identified skill gaps but also support long-term institutional strengthening, market competitiveness, and policy alignment across the region.

CHAPTER FOUR: RECOMMENDATIONS AND CONCLUSION

The Training Needs Assessment conducted across Kenya, Uganda, and Tanzania provided critical insights into the opportunities and challenges facing the organic sector in relation to using the EAOPS to facilitate trade. The findings revealed both common regional priorities; such as gaps in documentation, compliance, and market access, and country-specific needs, including vegetable processing requirements in Tanzania, financial literacy gaps in Uganda, and limited EAOPS implementation experience in Kenya.

These results reaffirm the importance of investing in targeted capacity-building interventions that address the technical, institutional, and policy dimensions of organic trade. Moreover, they underscore the urgency of developing interventions that are time-bound, practical, and scalable within the 18-month lifespan of the AfPQ project.

The recommendations presented here are structured to move from foundational actions (creating awareness and piloting training) to institutional strengthening and regional collaboration, and finally to policy advocacy and sustainability measures. This phased approach ensures that the project not only delivers immediate impact but also lays the groundwork for longer-term growth and competitiveness of the organic sector in East Africa.

The roadmap is organized into three (3) phases; Immediate Priorities (0–6 months), Short-Term Actions (6–12 months), and Medium-Term Actions (12–18 months), to align with the project timeline. Each phase addresses the critical areas of capacity-building, market development, institutional support, and policy engagement, with a strong emphasis on inclusivity and regional harmonization. *See the Table 13 below:*

4.1 Recommendations and way forward (18-Months Roadmap)

Table 13: Recommendations and way forward

Timeline	Focus area	Key actions
Immediate Priorities (0–6 months)	Awareness Creation and Dissemination	• Develop and roll out simplified EAOPS communication materials (infographics, short videos, guidelines) to show value of the EAOPS standard • Conduct EAOPS awareness-raising sessions through national associations (KOAN, TOAM, NOGAMU) to bridge EAOPS knowledge gaps.
	Pilot Training Rollout	• Implement the five training modules derived from the TNA findings (Documentation, Compliance, Production, Market Access, Communication). • Prioritize enterprises with demonstrated readiness to adopt EAOPS compliance systems.
	Stakeholder Engagement	• Hold national forums to present TNA findings and secure stakeholder buy-in. • Strengthen linkages with government agencies, certifiers, and organic associations for joint action.
Short-Term Actions (6–12 months)	Institutional Strengthening	•Support producer organizations to establish Internal Control Systems (ICS) and traceability mechanisms. • Facilitate mentorship and peer-exchange networks among enterprises across the three countries.
	Regional Harmonization	• Initiate inter-country exchange programmes to harmonize training

		delivery and share best practices. • Establish a regional taskforce to coordinate EAOPS implementation, monitoring, and advocacy.
	Market Development and Branding	• Provide technical support for branding, packaging, and value addition to strengthen competitiveness. • Facilitate connections with certified input suppliers and service providers.
Medium-Term Actions (12–18 months)	Policy Advocacy and Integration	• Advocate for the integration of EAOPS into national agricultural and trade policies in Kenya, Uganda, and Tanzania. • Engage with the East African Community (EAC) for regional institutionalization of EAOPS.
	Sustainability and Monitoring	• Develop a monitoring and learning framework to measure outcomes of training and institutional support. • Strengthen partnerships with universities and research institutions to build an evidence base for policy and investment.
	Inclusive Value Chain Development	• Mainstream gender and youth considerations in all project activities to ensure equitable participation. • Promote adoption of climate-smart and innovative organic production practices that secure long-term sustainability.

By following the above roadmap, BvAT, AfPQ, GIZ, and their partners will be well-positioned to achieve measurable progress in strengthening EAOPS implementation,

expanding market opportunities, and create a more resilient, inclusive, and competitive organic sector in East Africa.

4.2 Conclusion

The Training Needs Assessment has provided a comprehensive diagnosis of the capacities, gaps, and opportunities shaping the adoption and implementation of the East African Organic Products Standard across Kenya, Uganda, and Tanzania. By engaging a diverse range of stakeholders, including producer organizations, processors, exporters, certifiers, and policymakers the study has generated evidence that is both regionally grounded and contextually relevant. The findings reveal a sector that is dynamic and expanding, yet constrained by persistent challenges in compliance awareness, certification, market access, record-keeping, and policy engagement. While three quarters (75%) of enterprises demonstrated some level of awareness of the EAOPS standard, implementation remained limited, underscoring the need for targeted capacity development. Country-specific nuances also emerged, such as Tanzania's emphasis on post-harvest and processing requirements, Uganda's focus on certification processes, and Kenya's attention to market access and branding.

By applying the Kawakita Jirō (KJ) methodology, the training needs were clustered into five (5) coherent modules: Documentation, Traceability & Record-Keeping; Compliance, Certification & Standards; Production, Post-Harvest & Value Addition; Market Access, Branding & Business Development; and Communication, Advocacy & Policy Engagement. Together, these modules constitute a comprehensive framework that addresses both the technical (knowledge and operational skills for compliance, production, and certification) and strategic (market access, governance, and advocacy) dimensions of the organic value chain; ultimately leading to improved EAOPS adoption, stronger regional trade integration, and enhanced competitiveness of organic enterprises across East Africa. The TNA has, therefore, not only clarified the most pressing training needs but also provided a structured roadmap for capacity-building interventions under the AfPQ project. The implementation of these modules within the

project's 18-month timeframe will bridge critical knowledge gaps, enhance compliance with EAOPS, strengthen regional harmonization, and unlock new opportunities for organic producers to compete effectively in domestic, regional, and international markets.

Ultimately, the proposed training programme will help build an enabling ecosystem where producers, processors, and traders can thrive, while also fostering inclusivity, sustainability, and competitiveness in East Africa's organic sector

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CHAPTER FIVE: ANNEXES TO THE REPORT

Annex 1: List of Consulted Companies

The Training Needs Assessment was conducted with companies that were carefully selected from a pool of 92 organizations that participated in the baseline survey. The selection process ensured representation of different categories of 48 organic companies across the three (3) countries under review. From each country, a subset of 16 companies was identified based on their relevance, operational scope, and level of engagement in organic production and trade. These 48 companies formed the focus of the TNA, providing insights into their current capacities, challenges, and specific needs for adopting and implementing the East African Organic Products Standard (EAOPS). The consulted companies and the workshop dates are presented below.

Table 14: List of Consulted Companies; Kenya Uganda and Tanzania

Country	Companies	Date and place of assessment
Tanzania	Africa Harvest Enterprise Limited, Highland Organic company, Vegrab Organic farming Ltd,Lishe 360 limited, Kofik Entreprise, Organic Hill Company Limited, Afroc nature,SEMICO, IAM Organic,Eco Sustain, Asili Agro Centre, Upendo Development Group Pwani Kisarawe, Glen Africa Limited, Wisdom Group of Product Entreprises, Nature Rip Kilimanjaro Limited and Msonge Organic Family Farm	24th and 25th July 2025
Uganda	Fresh Veges PGS, Kasenge Riverford TC, Mohca Beauty Products, Blessed Organic Release, Kanye's Vermipro Ltd, Makonde, Memago Agro-ecology Ventures Uganda Ltd, Jero, Afri Soko, Patience Pays, Kipeke Solutions, Topa, Neco Farm, Gudie Leisure Farm, Banyakinkizi Coffee, Western Sil road Ltd, Reapers Group of Companies, SAGE	28th & 29th July 2025 Kampala Uganda

Kenya	Yatta Multipurpose Farmers Cooperative Society Limited, Forkel Farm Africa Limited, Soil Doctors, KIYA INITIATIVE (Kisumu Young Agriprenuers), KOFAR KENYA LIMITED, Farm Share kenya ltd, Sirgoi WRUA, Kitui Mt. Processor company Ltd, Mesheddy poultry farm, Fine Aromas of Kenya, Bunyala Agri climate ltd, Pat Organixs, Camlpo Ltd.	31st July & 1st Aug 2025 Machakos Kenya

Annex 2: Other documents

1. Terms of Reference for this Consultancy:

Link

2. Report for a meeting held between KOAN and BvAT to review companies selected for the AfPQ Project:

Link

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