



MOAN is an institutional Network that plans to gather the Ministries of Agriculture of 24 Euro-Mediterranean countries: Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Italy, Jordan, Lebanon, Libya, Rep. of Macedonia, Malta, Montenegro, Morocco, Palestine, Portugal, Serbia, Slovenia, Spain, Syria, Tunisia and Turkey. Membership of Cyprus, Greece and Portugal has not yet been finalized.

MOAN is a tool for decision makers to exchange information and good practices related to organic agriculture, to share common strategies for its further development in the Mediterranean area and to valorise its potential and identity in the global debate.

MOAN is coordinated by the Mediterranean Agronomic Institute of Bari (MAIB) Italy, forming part of the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM), an international inter-governmental organisation established in 1962 under the patronage of the OECD and the Council of Europe which presently groups 13 Mediterranean countries including Albania, Algeria, Egypt, France, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Spain, Tunisia and Turkey. ([www.ciheam.org](http://www.ciheam.org)).

CIHEAM is situated in Paris where the General Secretariat has its headquarters and promotes and co-ordinates the activities of the four Institutes located in Bari (Italy), Chania (Greece), Montpellier (France) and Saragoza (Spain).

## Organic Farming Policy in South-East Mediterranean and Western Balkans

### Approaches and Measures in Government Support



CIHEAM  
MAI BARI

MOAN info desk:  
Mediterranean Agronomic Institute of Bari  
Via Ceglie 9  
70010 Valenzano (BA), Italy  
Tel. +39.080.4606356  
Fax. +39.080.4606254  
[bteich@iamb.it](mailto:bteich@iamb.it)  
<http://moan.iamb.it>

ISBN 2-85352-397-7

# **Organic Farming Policy in South-East Mediterranean and Western Balkans**

Approaches and Measures  
in Government Support

Organic Farming Policy in South-East Mediterranean and Western Balkans  
*Approaches and Measures in Government Support*

Edited by:  
Patrizia Pugliese and Lina Al-Bitar

The present booklet has been prepared by a core working team including: Lina Al-Bitar, Marie-Reine Bteich, Kanj Hamade and Patrizia Pugliese, on the basis of information, materials and contributions provided by country representatives of the Mediterranean Organic Agriculture Network (MOAN).

The information contained herein has been obtained from or is based upon sources believed by the authors and editors to be reliable. Clearly, there is scope to further improve the accuracy and completeness of the presented analysis, therefore, any feedback from careful readers will be welcome and highly appreciated.



CIHEAM  
MAI BARI

Copyright©2008  
ISBN 2-85352-397-7

Graphic design by Comma 3 Bari.

## Preface

*Organic agriculture was launched in 1997 as a new field of interest and action at Mediterranean Agronomic Institute of Bari (MAIB), strongly supported by CIHEAM member countries. In more than ten years, organic agriculture has experienced an impressive and exciting growth in the Mediterranean involving at first, mainly private sector operators, NGOs and foreign donors, more recently and increasingly, governments and public agencies. MAIB has witnessed this dramatic evolution and to some extent accompanied it in some tracts through its short and long training initiatives and various cooperation projects.*

*In the framework of these activities, we had the chance to meet and cooperate with extraordinary people. Many of these experts, researchers, farmers, officers and trainees became our friends and continue to work with us. And we are grateful for their enduring and enthusiastic support.*

*The present booklet has been prepared for the Conference on 'Government Support Policies for Organic Agriculture. Experiences and lessons from around the world', co-organised by CIHEAM-MAIB, IFOAM EU-Group and UNCTAD in the framework of IFOAM 16<sup>th</sup> Organic World Congress 'Cultivate the Future' 16-20 June 2008, Modena, Italy. In line with the theme of the conference, the present booklet focuses on the public sector role and its interplay with other key stakeholders, in the development of organic agriculture with a specific focus on South-East Mediterranean and Western Balkans. Building on earlier works, the report aims at consolidating existing information and shedding light on less well-known experiences and situations in the developing and in transition countries of the Mediterranean area. With a sub-regional and comparative approach, the work also organises and presents the materials of the 3<sup>rd</sup> Mediterranean Organic Agriculture Network (MOAN) meeting held in March 2008 in Damascus (Syria).*

*Organic farming policy development represents a lasting priority area of the MOAN offering its member countries a permanent forum for information and good practices exchange and providing as well opportunities for fruitful cooperation and joint progress between the North, the South and the East of the Mediterranean Basin.*

Cosimo Lacirignola  
Director of CIHEAM –MAIB

Maurizio Raeli  
Coordinator of MAIB Organic Agriculture Division

## Acknowledgements

The editors and the team gratefully acknowledge the contributions from authors and the representatives of MOAN member countries who furnished the information and materials on the basis of which this booklet has been prepared.

Numerous helpful comments and inputs were also provided by the members of MOAN Steering Committee, Uygun Aksoy, Mohamed Ben Kheder, Lahcen Kenny and Irfan Tarelli. Special thanks for their continuing support and encouragement.

## Table of Contents

*List of Tables and Figures*

*List of Boxes*

### **Organic Farming Policy in South-East Mediterranean and Western Balkans**

1. Organic 'agricultures' in SE Med and WB: vibrant segments in changing agricultural and rural worlds
2. Government and public institutions' support for organic agriculture in SE Med and WB countries: success stories and learning pathways
3. Building on recent achievements, looking to the future...

### **Case studies**

Case study 1: Government support for organic agriculture in the Maghreb

Case study 2: Steps leading to the "National Action Plan" for organic agriculture in Turkey

## List of Tables and Figures

*Table 1: Organic statistics in SE Med and WB countries, 2006*

*Table 2: Government and public institutions' support for organic agriculture in SE Med and WB countries*

*Figure 1: Organic institutions and policy development in SE Med and WB countries: key chronology*

## List of Boxes

*Box 1 – Good, hard and indispensable: A long story on organic data and information in Turkey*

*Box 2 – Government's first steps into the organic sector in Morocco*

*Box 3 – Organic agriculture in Lebanon. A success story of synergy between the private and public sectors*

*Box 4 – Algerian support policies for organic agriculture. Analysis and outlook*

*Box 5 – The IHE Organic Farming or Wheat Project. Organic agriculture as a social responsibility project within the context of poverty alleviation and rural development*

*Box 6 – The CTAB. A centre of excellence for technical assistance in organic farming*

*Box 7 – Towards a balanced development for organic agriculture: proposals from Western Balkans countries*

*Box 8 – Government support policies for organic agriculture in Albania. A stepwise and pragmatic approach*

## Organic Farming Policy in South-East Mediterranean and Western Balkans<sup>1</sup>

### *1. Organic 'agricultures' in SE Med and WB: vibrant segments in changing agricultural and rural worlds*

The history of organic agriculture in SE Med and WB is relatively recent, but also rich and varied. Similar characteristics and development patterns are observed within specific groups of countries, yet the multifaceted diversity of single national organic sectors remains a dominant feature.

Private companies, governments, civil society organisations and international donors have all played an important role in the growth of organic agriculture in the area which in 2006 accounted for about 4% of the world total organic land area, that is more than 2 million hectares including wild collection (Table 1).

The area devoted to wild collection is extremely large (85% of the total), which represents a major feature of organic agriculture in the SE Med and WB area, more particularly in EU candidate and potential candidate countries and in Morocco.

Much more limited is, instead, the land area devoted to organic crop production which in 2006 extended for 350 thousand hectares with Tunisia and Turkey in the leading positions as they have always been since the emergence of organic agriculture in the region.

The market is primarily oriented towards export in that most of the produce, coming mainly from Egypt, Tunisia and Turkey, is destined for foreign markets, primarily for the EU but also for the USA, Japan and the Gulf area. The main products are olive oil, dates, dried fruits, medicinal and aromatic plants, tropical fruits, vegetables and citrus fruits.

<sup>1</sup> In the analysis carried out for the present work: *i)* South-East Mediterranean (SE Med) includes: Algeria, Egypt, Jordan, Lebanon, Libya, Morocco, Palestinian Authority, Syria, Tunisia and Turkey. These countries are comprised as Mediterranean partners within the European Neighbourhood Policy (ENP) framework, except for Turkey that is an EU potential candidate country; *ii)* Western Balkans (WB) include: Croatia, the former Yugoslav Republic of Macedonia (FYROM), which are EU candidate countries, and Albania, Bosnia and Herzegovina (BiH), Montenegro and Serbia, which are EU potential candidate countries.

Table I: Organic statistics in SE Med and WB countries, 2006<sup>2</sup>

Countries		Organic land area without wild collection (ha)	Organic land area incl. wild collection (ha)	Operators (no.)	
EU candidate and potential candidate countries	Western Balkan Countries	Albania	171	1,201	93
		BiH <sup>(a)</sup>	714	488,804	60
		Croatia	6,012	23,670	342
		FYROM	509	2,101	104
		Montenegro	25,051 <sup>(b)</sup>	158,851	15
		Serbia	906	1,102,906	48
	Turkey	100,275	192,789	14,737	
<b>Sub-total</b>		<b>133,638</b>	<b>1,970,322</b>	<b>15,399</b>	
European Neighbourhood Policy (ENP) Mediterranean partner countries	Mashrek	Egypt	14,165	14,165	460
		Jordan	1,024	1,024	25
		Lebanon	3,470	3,470	213
		Palestinian A.	641	641	303
		Syria	30,493	30,493	3,256
	<b>Sub-total</b>		<b>49,793</b>	<b>49,793</b>	<b>4,257</b>
	Maghreb	Algeria <sup>(c)</sup>	1,550	2,400	61
		Libya	-	-	-
		Morocco	4,216	104,216	n.a.
		Tunisia	154,793	220,476	952
<b>Sub-total</b>		<b>160,559</b>	<b>327,092</b>	<b>1,013</b>	
<b>TOTAL</b>		<b>343,990</b>	<b>2,347,207</b>	<b>20,669</b>	

<sup>(a)</sup> Bosnia and Herzegovina consists of two entities, the Federation of Bosnia and Herzegovina (FBiH) and Republica Srpska (RS), in accordance with the Dayton Peace Accord. The Ministry of Agriculture is at the entity level; <sup>(b)</sup> Pastures and meadows included; <sup>(c)</sup> Figures for Algeria underestimate wild collection and forage crops.

<sup>2</sup> Adapted and updated from : Al-Bitar (2008) *Organic farming in the Mediterranean: Towards Further Development*. In: Willer, H., Youssefi-Menzler M. and Sorensen N. (Eds.) (2008) *The World of Organic Agriculture. Statistics and Emerging Trends 2008*. IFOAM FiBL, Frick, Switzerland.

However, it is worth mentioning that despite the substantial developments experienced by the sector over the last years, access to reliable statistical data and information about the state-of-the-art and scope of organic agriculture, remains a challenge and only few governments have taken on board (Box I).

A striking, profound and persistent duality characterises farming systems and agricultural structures in SE Med and WB countries. A modern, export-oriented, high-value agricultural sector of large capital-intensive farms dominates in coastal and peri-urban areas, while subsistence family agriculture survives in marginal and remote areas.

In these countries, organic agriculture mainly (albeit not exclusively) falls into the first category given the size of most converted farms and the market value of organic export.

**Export-driven growth** of organic agriculture is strongly boosted by foreign and local private operators that often control the whole supply chain, from the production to the market, and provide farmers all required inputs and services, including technical advice and certification.

At the same time, export-oriented growth is an important priority for many governments that value organic products primarily for their contribution to the national agro-food trade balance. Clearly, environmental, health and broad rural development concerns are also normally included in official organic policy narratives.

The shift from governments' sympathetic discourses to more concrete commitment towards organic agriculture has produced in the past years important regulatory interventions and an interesting range of organic support policies now in place in most SE Med and WB countries. An **institutionalised development path** more or less gradually emerged, often parallel to the (export) market-driven path and strongly marked, in some cases at least, the evolution of the sector.

To better address increasing rural-urban income disparities and face competitiveness and sustainability challenges in a globalised world, according to the latest World Bank report, these '**transforming countries**' need innovative policy initiatives aimed to shift to high-value agriculture, decentralise nonfarm economic activities in rural areas and provide assistance to help move people out of agriculture (WB 2008<sup>3</sup>).

It is in these evolving frameworks that organic support policies are being implemented and will develop in the coming years. Thus, though the mainstreaming of organic agriculture has not started yet, or is at the very beginning, adequate **contextualisation**, taking into account country-specific conditions, policy traditions and styles, is essential for a full understanding of the different forces and processes leading to the adoption of current organic support policies and of their mixed outcomes and impact.

<sup>3</sup> World Bank (2008) *World Development Report 2008. Agriculture for Development*, Washington DC. <http://siteresources.worldbank.org/INTWDR2008/Resources/2795087-1192111580172/WDROver2008-ENG.pdf>

**BOX I Good, hard and indispensable: a long story about organic data and information in Turkey**

Organic agriculture started in Turkey in the early 1980s but the sector remained largely unregulated and slowly developed until 1994 when the Ministry of Agriculture and Rural Affairs (MARA) stepped in and committed to developing a strong and effective organization in support of the organic sector. However, the sector did not experience a period of rapid development until 2003 with the establishment of the Department of Alternative Agricultural Production Techniques (ATUT) and the publication of the national legislation in 2004.

Data collection was started in Turkey in 1990 by the Turkish Association of Organic Agriculture (*Ekolojik Tarım Organizasyonu Derneği/ ETO*) that collected basic data through inspection and certification bodies. Since 1996 this activity has been conducted by MARA. In 2004 the Organic Farming Information System (OFIS) was established. It is a data network developed throughout the country enabling the online collection of organic statistics using SQL servers in MARA Headquarters. OFIS allows complete information exchange between authorised inspection and certification bodies and MARA. A detailed database was generated after the enforcement of the Organic Farming Law in 2004 and data are organised according to the European Commission format.

An EU-funded project was implemented from 2006 to 2007 aiming to enhance the sustainable development of organic agriculture and related sectors in accordance with the EU *acquis*. One of the project tasks was “information management and communication” for the Turkish organic sector. OFIS made progress with this task. Thanks to the supply of new hardware and software to MARA, OFIS was further developed to include additional information (certificates, livestock, and beekeeping) to improve the reporting function so that information can be easily summarized. A training course in database management and reporting was given to MARA staff.

Within the EU-funded project the development of a codification system to improve traceability and labelling of organic products was also discussed with control and certification bodies.

OFIS initiative has proven to be a very effective tool for monitoring the organic sector and developing related legislation and policies. It can be usefully replicated in other countries.

(continued)

**BOX I (continued)**

More concretely, OFIS:

- increases the quality of statistical data in organic agriculture;
- provides fast, continuous, easy and confidential access to updated information on organic agriculture in the country;
- supports MARA and its Provincial Directorates in accurate monitoring and control all production phases and knowing in advance the varieties and amounts of products to be produced within the year;
- provides access to producers' identification, field registration and product information; identification and information on commercial firms, their type of activity, groups of processed products and issued certificates;
- supports MARA and its Provincial Directorates in monitoring the work of inspection and certification bodies (field controls, issuing of certificates)
- provides control and traceability for the strategies, policies, planning, trainings and supporting activities to be developed by the Ministry.

However, to improve OFIS implementation some critical issues need to be addressed:

- unwillingness of authorized bodies to supply data since it implies non remunerated extra work and land tenure problems make data entry is very difficult;
- difficult access to market data (especially producers' wholesale and retailers' price) due to commercial concerns.

Source: Engiz M. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria

## 2. Government and public institutions' support for organic agriculture in SE Med and WB countries: success stories and learning pathways

In most SE Med and WB countries pioneer NGOs' initiatives and export projects preceded (and flourished independently from) governments' interest and intervention (Box 2).

National regulatory and institutional frameworks of organic agriculture have considerably developed in the past twenty years but not at a steady pace. Rapid accelerations and discontinuities in organic policy support variously affected the quality of established structures, human capital capacities and the effectiveness of adopted measures.

### BOX 2 Government's first steps into the organic sector in Morocco

In 1986 the first organic pioneer initiatives took place in Morocco. These initiatives were directed towards export markets, they focused on the conversion to organic agriculture of products that were already successful conventional export. Thus organic citrus fruits and olive oil were the first products to reach EU market starting in 1990, followed by medicinal plants and essential oils. This was done with neither interventions nor support of public authorities. As a matter of fact, the totality of Moroccan organic products is exported, there is no local market yet. Moreover organic products have experienced a boom from 1,895 tons in 1998/99 to 7,230 tons in 2006/07 (19% annual growth): 94% is sold in France, 3% in the rest of Europe, 4% reaches other destinations.

Since 1998 organic initiatives have been launched in less favorable areas (Middle Atlas mountainous region), resulting in the conversion of relatively large land area to organic wild collection practices. These initiatives, supported by local authorities, are centered on the sustainable management and valorization of natural resources. In addition to their impact on rural communities, they have created a local political dynamics which may impact policy making at the national level especially if it succeed in linking organic farming practices to the achievement of the objectives set up in the Moroccan Rural Development Strategy - Horizon 2020. Following some of these objectives: *i)* valorization of natural resources, *ii)* increase of employment and income in agricultural activities, *iii)* reduction of the degradation of the environment, *iv)* re-vegetation of natural spaces and *v)* sustainable management of hydraulic resources.

Moroccan policy makers consider that public agriculture institutions will have to adapt (and adopt) rapidly to the emergence of organic methods of production. Within the Ministry of Agriculture Rural Development and Maritime Fishery the understanding of the role of public institutions in further development of the organic sector along with the awareness of the advantages organic farming can bring in terms of both the export market and rural development is growing.

Within this context, the State has been moving forward and work has been done towards the elaboration of a draft law on organic agriculture. The expected adoption of the law confirms the public commitment to implementing an effective and reliable control system, able to create and maintain consumer trust in organic products carrying the Moroccan label. The draft law is envisaging the creation of a national consultative body, which together with the competent authority - i.e. the ministry – will monitor the development of the organic sector. This consultative body represents an opportunity for organic stakeholders to work together for a balanced development of the system both in terms of the export market and sustainable rural development objectives as presented in the Moroccan Rural Development Strategy.

Source: Arif K. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria

A key chronology of organic institutions and policy development in SE Med and WB countries is reported in Figure I.

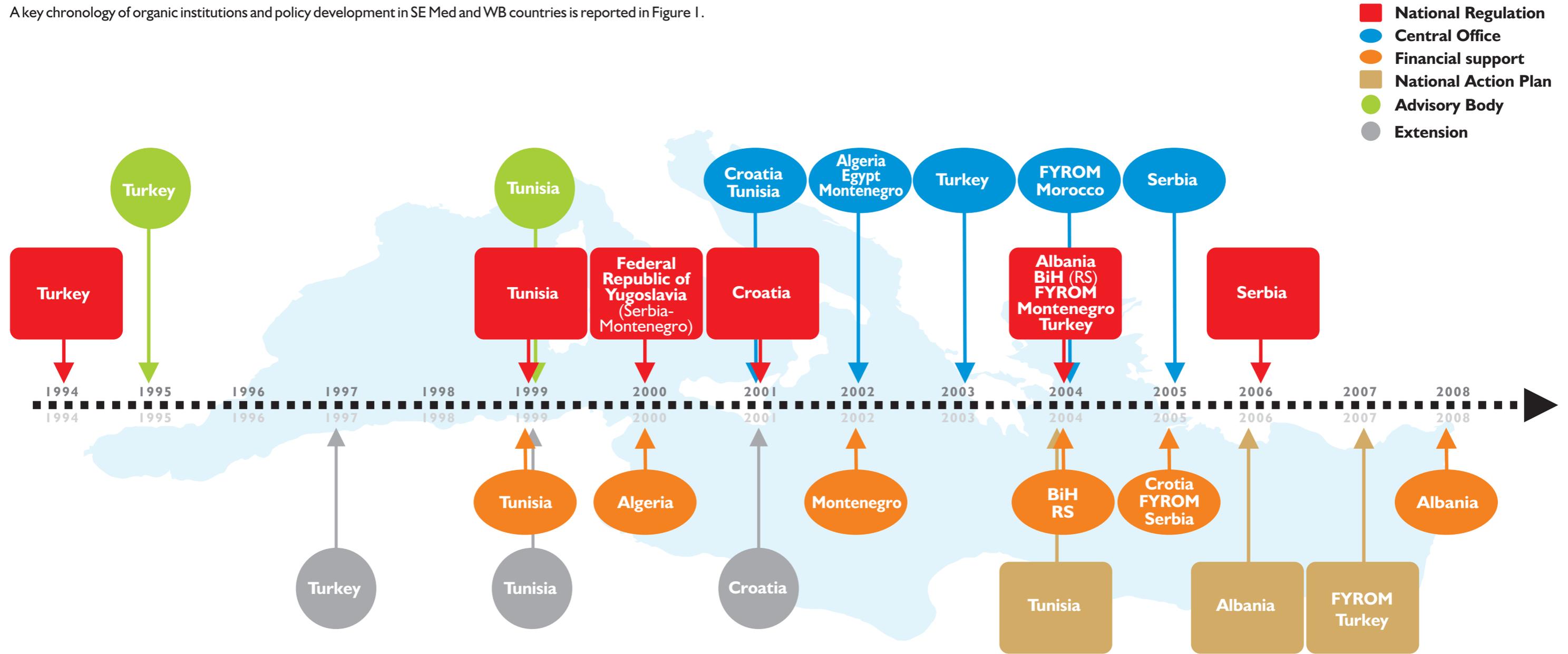


Figure I: Organic institutions and policy development in SE Med and WB countries: key chronology

Table 2 provides some complementary insights into the multiplicity of adopted approaches and measures.

**Table 2: Government and public institutions' support for organic agriculture in SE Med and WB countries**

Countries		State regulation, central office & interaction with the sector				Support for production & supply chain organisation				Support for market development			Pro-organic initiatives in public support structures			National Action Plan / strategic document	
		National regulation (a)	Central office (b)	Data collection (c)	Advisory/ Consultative body (d)	Certification costs	Area payment	Investment grants	Other	National logo (e)	Promotion (f)	Other	Education	Extension	Research		
EU candidate and potential candidate countries	Western Balkans countries	Albania	●	◐	●	◐	●				●		●	●		●	
		BiH	○				●				●	(g)					
		F BiH															
		RS	◐				●	●									
		Croatia	●	●	●	●	(h)	●	(i)		●	●		●	●		
		FYROM	◐	●	●	◐	●	●		(j)	◐	●					●
	Montenegro	●	●	●		●	(k)	●		●	●						
Serbia	◐	●	●		●	(l)	●	(i)(l)		○	●	(l)		●			
	Turkey	●	●	(m)	●	●	(m)		●	●	(j)(n)		●	●	●	●	
European Neighbourhood Policy (ENP) - Partner countries of the Med region	Mashrek	Egypt	○	●									●	●	●		
		Jordan		●													
		Lebanon	○	◐	◐	●						●					
		Palestinian A.															
		Syria	○	◐		◐											
	Maghreb	Algeria	○	●	◐	(o)		●		(p)				●			
		Libya															
		Morocco	○	●		(o)	(q)					(q)		●	◐	(r)	
		Tunisia	●	●	●	●	●		●	(s)		●		●	●	●	●

**Notes:**

- <sup>(a)</sup> National regulation: ● fully implemented ◐ partially implemented ○ in draft
- <sup>(b)</sup> Central office: ● established ministerial unit ◐ ministerial unit not established. Ministerial personnel devoted to deal with organic agriculture issues
- <sup>(c)</sup> Data collection: ● officially conducted ◐ informally conducted
- <sup>(d)</sup> Consultative body: ● consultative body comprised of representatives from the public and private sectors officially established and functioning ◐ established but not fully performing its tasks yet
- <sup>(e)</sup> National logo: ● created and used ◐ created but not used ○ in draft
- <sup>(f)</sup> Promotion: it mainly includes participation in national and international fairs and events, production of promotional and educational materials, information and educational campaigns
- <sup>(g)</sup> Support for producer organisation
- <sup>(h)</sup> In Croatia some local authorities also provide support for organic agriculture through partial coverage of certification cost and area payments
- <sup>(i)</sup> In Croatia and Serbia per head payment are also provided
- <sup>(j)</sup> In Macedonia (FYROM) and Turkey support for laboratory analyses is also provided
- <sup>(k)</sup> In Montenegro and Turkey certification costs are covered for export products only
- <sup>(l)</sup> In Serbia payment levels are higher for Less Favoured Areas
- <sup>(m)</sup> In Turkey the 'Alternative Agricultural Production Techniques' Department operates under the General Directorate for Agricultural Production and Development within MARA (Ministry of Agriculture and Rural Affairs). Two official committees support the Department in its work: one with the mandate to take decisions and another one with consultative and advisory tasks. Organic Farming units have been created at MARA Provincial Directorates level (see case study 2).
- <sup>(n)</sup> In Turkey organic farmers can benefit from reduced interest rate loans
- <sup>(o)</sup> In Algeria and Morocco a national advisory body exists but it is comprised of representatives from the public sector only
- <sup>(p)</sup> In Algeria support for: i) soil preparation and input acquisition; ii) additional per ha incentive for converting producers; iii) per kg incentive for exporters of organic products is also provided
- <sup>(q)</sup> In Morocco coverage of certification costs as well as training and support for marketing are sometimes provided at the regional level in the framework of international cooperation projects involving local authorities and NGOs
- <sup>(r)</sup> In Morocco fragmented extension activities exist at the regional level
- <sup>(s)</sup> In Tunisia a presidential prize for the best organic producer is annually awarded

The sequence of key chronological events shows that in several countries the enactment of a **national legislation** for the organic sector has been the first move – isolated or associated to other measures – towards the building of the domestic institutional setting for organic agriculture.

Organic regulations have been enacted in Turkey (1994), in Tunisia (1999) and, more recently, in most Western Balkans countries. However, some national legislations are not all fully implemented yet because by-laws are in preparation and institutional structures under development. Draft regulations are being discussed in most of the remaining countries.

The elaboration or revision process of national regulations has been at times supported by international cooperation projects on institutional capacity building.

Truthful labelling represents a major objective for the approval of a national regulation which is also frequently perceived as a sign of explicit political commitment to the organic sector, a tool for its official recognition (identity) and, in concerned countries, a question of compliance with EU integration requirements.

Interestingly – and confirming experts' analysis in other parts of the world (Rundgren 2008<sup>4</sup>) – the facts reported in the SE Med and WB area show that, where the organic sector is in an early development stage, the local market is virtually non-existent and export is the main driving force, the setting up of the regulatory framework is hardly a private sector priority.

From private actors' perspective it is with the development of local market that the enactment and enforcement of a national regulation become relevant. But in some SE Med and WB countries the latter has actually preceded the former clearly affecting also the work of **certification** bodies, especially of domestic ones.

Various cooperation initiatives, mainly implemented by foreign NGOs, have contributed to the establishment of home-based inspection and certification bodies. Some of those are local branches of international bodies. Only in Montenegro is the domestic provider a state body. In situations where the national regulation was (or still is) not implemented or substantially irrelevant because of the absence of a local market, domestic bodies have maintained lasting links with their foreign supporters – e.g. through providing inspection services for parented international certification bodies and/or benefiting of the full/partial coverage of inspection costs.

However, gradually, domestic bodies are also tending to integrate into developing national regulatory and policy frameworks. Where feasible and relevant they start providing certification services according to the national law and to directly or indirectly benefit from the public support for certification (see below).

Much more limited or virtually non-existent is, instead, the interaction with public authorities of foreign certification bodies that do not have a local bureau and are almost exclusively interested in the export market.

EU regulation has been used as a main reference also because for most countries EU represents the main (albeit not the only) export target market. Harmonisation efforts between the national law and EC Reg. 2092/91 have been undertaken in Tunisia and Turkey aiming at the inclusion in the EU third country list as well as in candidate and potential

<sup>4</sup> Rundgren G. (2007) Best Practices for Organic Policy: What developing country governments can do to promote the organic sector, UNEP-UNCTAD CBTF. [http://www.unep-unctad.org/cbtf/publications/Best\\_Practices\\_UNCTAD\\_DITC\\_TED\\_2007\\_3.pdf](http://www.unep-unctad.org/cbtf/publications/Best_Practices_UNCTAD_DITC_TED_2007_3.pdf)

candidate countries, pushed by the EU integration process. Further efforts can be envisaged in the near future to take into account the changes included in the newly approved EU regulation.

In many cases the elaboration of the national regulation has also represented one of the first opportunities for **interaction between public institutions**, on one hand, **and the NGO and private sector**, on the other.

Styles and impacts of such interaction are quite varied across countries, some of which have also established a permanent advisory and consultative body to support decision-making in the field of organic agriculture.

However the private sector is not well represented or indeed at all in all existing consultative bodies. In addition, where it is represented, it should also be considered that the contribution that these platforms for dialogue can give to the development of the sector clearly also depends on the presence of a unified and well-organised organic movement, which is not yet the case in many countries, notwithstanding the international cooperation support for the creation of local associations and umbrella organisations.

Stakeholder involvement in policy development is a broadly and lively debated issue also in the SE Med and WB area where, though, some policy development paths still appear rather disconnected from the real sector's features and needs in terms of support structures and services.

In various cases, rapid accelerations driven by internal and/or external forces have produced unbalanced growth patterns.

At the same time, policy-makers are increasingly aware of the need to fine tune public action with the agendas and the capacities of all involved stakeholders, namely, other public institutions, organic associations, market operators and, in countries where organic agriculture is still in its pioneering stage, with international cooperation agencies operating in the field (Box 3).

In most countries a **central office** has been created at the ministerial level to deal with organic agriculture issues, another crucial component of the institutional landscape of the organic sector. Ministerial units are often understaffed though and in need of capacities development to effectively perform their multiple tasks. The place and operational linkages these units have within the ministerial organisational structure are also determining factors in their efficacy.

The design, implementation and evaluation of **financial support** measures for the sector are newly introduced practices in many SE Med and WB countries. This can help explain the unsatisfactory uptake (often linked to inadequate eligibility conditions) and the modest impact on the growth the sector experienced in some cases, which however also resulted from poor promotion and lack of transparency pointed out by targeted beneficiaries (Box 4).

With regard to support for production and supply chain organisation, the coverage of a certain share of the certification cost and area payments are the most widespread available options. Other instruments (e.g. investment grants, reduced credit rates, support for producer organisations) are much less used.

Demand-pull measures are also very limited. Promotional efforts mainly include support for participation in local and international fairs and, in some cases, for the production of educational/information materials.

Only a few countries have so far created a national logo for organic products. However, this instrument is not always effectively used.

### BOX 3 Organic agriculture in Lebanon: a success story of synergy between the private and public sectors

Organic agriculture was initiated in Lebanon in the late 90s thanks to private sector's initiatives. The sector has experienced since then a constant increase, even though at a slow pace, encouraged by a successful synergic formula existing between the private (acting as pioneer and leading factor) and the public (that acts as catalyst).

The development of the sector in Lebanon shows that most indicative activities were initiated by the private sector and the government, mainly the Ministry of Agriculture (MOA) and the Ministry of Economy and Trade, who were always ready to assist, coordinate and implement the initiatives and to answer, at all levels, stakeholders' needs.

In this respect, MOA has conducted through contract services a nation wide project on "technology transfer and extension to farmers and support to marketing" including a component on organic agriculture, with an IFAD fund (loan given to the Lebanese government) and World Bank supervision. The project was implemented and monitored in close cooperation with the private sector.

MOA has been actively involved in chairing the National Commission on organic agriculture, formulating the Lebanese Norms, preparing a draft of law (that is about to be approved by the parliament) in collaboration with International Organizations (FAO and CIHEAM-MAIB) and all the Lebanese stakeholders.

MOA in its newly formulated strategy plans to support organic farming in close cooperation and partnership with the various actors, through the creation of a unit responsible for the sector's organization, the introduction of organic in all extension activities and development projects and the elaboration of organizational decrees for the application of the law.

Organic farming in Lebanon has shown a big potential for further development. In fact, in its vision, MOA is conscious that the empowerment of the competent authority will reinforce its synergy and support to the private sector, and will automatically push for further development of both local and export markets.

Source: Chemaly G. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria

11

### BOX 4 Algerian support policies for organic agriculture: analysis and outlook

Policies in support of organic agriculture in Algeria started in 2000 with the National Plan for Rural and Agricultural development. This strategic document translated a new political vision for agricultural development.

The Algerian organic policies were axed in favour of a sustainable improvement of food security, the conservation and revalorization of natural resources taking into consideration the economic viability and protection of the environment. Within this new vision public authorities financially support organic production based on a series of measures: *i*) per hectare payment; *ii*) conversion period compensation; *iii*) subsidies of exported production and *iv*) subsidies for soil preparation as well as for the acquisition of inputs. However, this support program has not achieved the expected successful development of this sector yet, since very few farmers applied to it. The reasons seem to be linked to the lack of information, knowledge and awareness on organic agriculture production methods. Other reasons could also be linked to the absence of a specific organisation of the sector set by clear rules and regulations. Moreover, the lack of experiences in the promotion of such a type of product and the lack of information on export markets were definitely a hindrance to the success of this program.

The failure in developing alternative markets seems to be the most important reason for the failure of the applicability of this policy. Independent private sector initiatives were successfully carried out by exporters in cooperation with foreign certification bodies. The networks of organic producers linked to private exporters account for 12 projects producing organic medicinal herbs (3000 ha under conversion), essential oils, dates, wine, table olive and olive oil as well as vegetables.

Private exporters' initiatives succeeded in gathering producers as the projects guaranteed the following elements: *i*) full technical support during all stage of production; *ii*) covering of inputs costs; *iii*) covering of certification fees, and *iv*) guarantee for an export market.

Today the public support program is being re-examined in collaboration with all stakeholders in order to:

- give support to the structuring of the organic supply chain;
- improve the knowledge and the raise awareness on organic production methods;
- guarantee a better access to specific organic production means;
- promote organic products;
- encourage organic research and development and
- establish certification and control bodies and agencies.

Source: Hadjeres N. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria

12

Financial resources to support organic measures are mostly drawn from national budgets for agriculture development. In the short- and medium-term future, for candidate and potential candidate countries, the inclusion of organic farming schemes in EU-funded rural development programmes represents a promising opportunity, but also a big challenge especially where interaction between 'agriculture' and 'rural development' circles is still relatively poor. Encouraging signs in this direction have been observed in some countries.

Nation-wide initiatives are sometimes complemented by **local authorities' support** for local organic communities. Export-driven growth increasingly co-exists with sustainable development initiatives. Across the region, organic agriculture is the structuring and catalysing component of many remarkable initiatives in which local authorities cooperate with local communities (and other actors) to address issues which, depending on the specific natural and socio-economic context, can range from serious poverty alleviation to the development of synergies with regional products and the enhancement of rural areas multifunctional character.

**BOX 5 The IHE Organic Farming or Wheat Project. Organic agriculture as a social responsibility project within the context of poverty alleviation and rural development**

In 2005 Istanbul Municipality and its Public Bread Company (IHE) launched the "IHE Contractual Organic Agriculture and Organic Bread Project" (in short "IHE Organic Farming or Wheat Project").

In ten selected provinces of the East Anatolian and East Black Sea Region where rural poverty is widespread the project is supporting the production of organic wheat which is then processed at the factory of the Istanbul Public Bread Company. In 2006 Istanbul kiosks and supermarkets sold 10,000 loaves of bread (400 grams each) produced by IHE using 8 thousand tons of organic (and in conversion) wheat purchased at a price 40% higher (20% for in conversion produce) than the conventional, from 1,400 contracted producers in the project area. Over a five-year period the project plans to involve 12,500 households.

In line with its objectives, the project has produced multidimensional benefits.

Denge A.Ş., an IHE sub-contracted consultancy firm, has been responsible for the identification of farmers in the project provinces, their training and contracting, for record-keeping and the organization and assistance of the inspection and certification process. IHE also provided farmers in advance payments and subsidized inputs (such as organic fertilizers and seeds), coverage of certification costs and direct income support for people willing to return to their villages from Istanbul and get involved in the project.

*(continued)*

13

**BOX 5 (continued)**

The project has contributed to:

- increase local producers income level (not only through guaranteed market access premium prices but also thanks to yields improvement with allowed inputs)
- encourage local development, reduce migration from rural areas of Eastern Turkey to Istanbul and, possibly, facilitate reverse migration
- raise awareness about organic agriculture among producers and consumers and develop domestic market
- create an enabling and supportive environment for the development among concerned institutions
- promote organic agriculture in Turkey and, through it, to environment and human health protection as well as to the national economic development.

Close cooperation with MARA directorates, local municipalities and institutions, R&D institutions, universities, farmer organizations, NGOs has been crucial so far to the success of the initiative. District MARA Directorates have even modified their extension program to incorporate organic farming in their regular farmer education services.

A formative evaluation of the initiative conducted in 2007 has shown that, overall, given its size, the project planning and implementation has been very satisfactory. The only reported problems were some farmers' complaints about payment delays and the unethical behaviour of some leader farmers that, however, were identified and eventually excluded from the project.

The project, through its comprehensive approach to social responsibility, has been able to show that organic agriculture can be an effective tool for sustainable rural development and poverty alleviation. On the basis of its positive outcomes – which have been extensively disseminated through various materials and events in collaboration with local and international organisations– the development of similar projects in other parts of Turkey and across the Mediterranean region should be considered.

Source: Engiz M. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria

14

In some countries a number of noteworthy pro-organic initiatives are also being undertaken within public support structures in the field of **education, extension and research**.

Short and long courses on organic farming are being organised by colleges and universities; in some cases, training has been provided to extensionists and internal organisational changes have occurred within public extension services to better deal with organic producers' needs; specific research programs on organic agriculture have been supported by public funds (Box 6).

## BOX 6 CTAB: a centre of excellence for technical assistance in organic farming

Tunisia intends to become the first organic producer in Northern Africa by relying upon the quality, credibility, competitiveness and effectiveness of the sector. To this end, the Tunisian government is focusing its attention on the development of this sector and the organization of its supply chain. Indeed, on the occasion of the National Agriculture Day on May 12, 1999, the President of the Republic granted the organic farming sector considerable advantages in terms of investments, undertaking to bear part of the costs for the control and certification and provide technical support by the establishment of the *Centre technique de l'agriculture biologique* (CTAB). Since then, the CTAB has been operating to foster the development of organic farming through:

- training, refreshing and specialization activities addressed to extensionists, farmers, trainers and teachers in agriculture, and through establishing regional organic farming networks including the '*Commissariats Régionaux de Développement Agricole*', the '*Centres de Formation Professionnelle Agricole*', the '*Unions Régionales d'Agriculture et de la Pêche*', the '*Groupements interprofessionnels*', the '*Centres techniques*' and '*Offices de mise en valeur*';
- research carried out at its experimental station and especially in the different pilot plots the Centre has established on the farmers' land in order to fit the findings from research to the real farm conditions according to the farmers' needs and demand ;
- information and awareness-raising programmes addressed to operators through seminars, conferences and briefing days at the national, regional and local level, as well as the organization of guided tours to the experimental stations, in addition to the preparation and circulation of all relevant technical and scientific documentation to users.

Such extension activities have attracted a great number of new operators to organic farming, contributing in terms of production, processing and export, on one hand, and increased organic farming surface areas and exported products, on the other hand.

Source: Ben Kheder M. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria

15

Finally, four countries have elaborated and are now implementing a **National Action Plan** (NAP) for organic agriculture.

Steps leading to the preparation of a national action plan can provide important opportunities for a good understanding of the sector's dynamics and potential as well as for an adequate stakeholder involvement. A NAP process can also have important impacts in terms of institutional learning and moves towards an integrated and balanced development of organic agriculture, which is a highly needed approach in many countries (Box 7).

## BOX 7 Towards a balanced development for organic agriculture: proposals from Western Balkans countries

In Western Balkans Countries (WBC) the debate on future development of organic agriculture is taking place, with the involvement of public and private actors, within various cooperation projects and consultation networks operating at different levels: national, sub-regional and Mediterranean.

Circulating opinions and proposals increasingly appear to converge on the need to pursue the path of a balanced development. Well targeted institution development and capacity building for public and organic movement structures need to be combined with smart action in policy development and adequate supply chain structuring and management. Below, these ideas are further developed and contextualized into the evolving institutional settings of candidate and potential candidate countries.

In WBC organic agriculture appears to have been institutionalized from the start and is progressively being integrated into current agriculture and rural development policy-making, in the framework of EU integration processes. Nevertheless, in some cases, this is happening without a full and widespread awareness of organic agriculture's full potential for rural development and even when ministerial organic units are under the umbrella of rural development departments, interaction between organic and rural development divisions remains substantially weak. Better and thoughtful synergy in policy-making processes could instead foster the mainstreaming of organic agriculture and integrate its future development trajectories into the wider rural development context and dynamics. Interesting opportunities in this direction may be available through pre-accession funds but adequate institutional capacities need to be built up. Equally essential is the inclusion of some flexibility in policy programs and measures, taking into account also the important institutional learning processes currently undergone by state structures and other institutions.

If, on one hand, the need for the state to become an important actor in the development of the national organic sector is frequently asserted, on the other hand, extremely crucial is also the role to be played by national movements that are expected to make further efforts to: *i*) improve technical and lobbying capacities and skills; *ii*) enlarge its representativeness in order to include all the different interest groups connected to organic agriculture and *iii*) consolidate and broaden their identity also by drawing the attention of other potentially interested actors in these countries rapidly evolving societies (including mainstream agriculture).

Organic product diversification (towards other competitive crops) and structuring of related supply chains is needed to foster further development of organic agriculture. A relatively well-organized supply chain already exists for export high-value organic products, that is medicinal herbs, honey, berry fruits and wild collection products that are sold on European markets (mainly Germany, Switzerland, Austria and Sweden).

16

(continued)

**BOX 7** (continued)

Real development of other kinds of products has been so far hindered by low supply and the lack of processing plants. Furthermore, most organic producers and processors complain about the lack of adequate extension and advisory services which are crucial for the well-functioning of the whole supply chain. If export performances are quite satisfactory, poor (with some exceptions) is still the growth of local market due to low supply (again) but also to low consumer awareness and, sometimes, confusing promotional campaigns of generic 'natural/healthy products'. The creation and improvement of supporting structures and services for production and market development can be a very important area of public-private interaction and partnership. Clearly a participatory joint assessment of the sector's needs and trends would represent a very good start.

Finally, strengthening intra-WBC cooperation, exchange and networking is also a highly appreciated area of intervention given the fact that organic sectors in these countries are at similar stages of development and agriculture (and rural development) policy making is developed in the EU framework, with a common ambition for integration

Source: MAIB (2008) Organic Agriculture in the Balkan area. *A comparative analysis*. Report prepared for the Italian cooperation project BIO84 "Training of technical experts in organic agriculture, in support of rural development and of food emergency in the Balkan area".

**3. Building on recent achievements, looking to the future ...**

Clearly, the size, the development pace and the expected impact of the above mentioned measures are not directly comparable across countries.

At the same time, these initiatives all play a part in an overall positive dynamics characterising organic agriculture in SE Med and WB countries.

In the past two decades the civil society's pioneer spirit, the private sector's investments, public authorities' support and international cooperation's efforts have contributed to produce a critical mass of interventions and mixed results (Box 8). In the coming years growth stability and consolidation of the organic sector will depend on the **constructive interplay among the different actors** of the organic arena and their capacity for a long-sighted vision and integrated action, at the national and regional level.

Yet, local movements' weaknesses, the limited, at times, ill-informed and discontinuous allocation of resources by public authorities, the overlapping and lack of coordination among the different donor's projects and the absence of adequate market strategies can hinder further development of organic agriculture and capitalisation on early achievements.

Once in place, key mechanisms need to mesh correctly, which calls for the mutual acknowledgement of roles and tasks, enhanced capacities, good information exchange and thoughtful cooperation.

- 17
- 18 The 'institutionalised' and the 'market-driven' development paths currently co-exist. Appropriate synergies could be built through **broadening the range of support measures** for organic agriculture and increasing **investment in human resources** in terms of staffing and capacity development.

The organic sector is expanding fast in rapidly changing institutional settings, new policy approaches are being pioneered and newly established structures and procedures are being tested. An **objective and critical assessment** of what has been done so far could help policy-makers learn from experience and better target future interventions.

**BOX 8 Government support policies for organic agriculture in Albania:  
a stepwise and pragmatic approach**

Albania's unique natural resources, more than twenty years of extensive agriculture practices in a large part of the national territory and its historical low use of chemicals are all important pre-conditions for the development of organic agriculture which, unlike conventional farming, can turn a certain degree of backwardness into assets for increasing agriculture competitiveness. Interestingly in Albania, organic agriculture is not only valued as an alternative approach to farming but also as a promising sub-sector that can supplement conventional agriculture production and contribute to the common objective of reducing the high import share in the agro-food trade balance that remains important despite recent progress.

Organic agriculture was first introduced in Albania almost ten years ago pioneered by the Organic Agriculture Association. Through the support of foreign donors (FiBL and Avalon) many activities were implemented. SASA, another project funded by the Swiss government has contributed to increase the supply of organic produce by supporting new stakeholders like Alblnspekt (local certification body), BioAdria (a research and extension network) and a marketing unit as well. In addition, INTERREG program has trained many Albanian experts by updating their knowledge on sustainable agriculture principles and rural development. The PAB project, implemented by MAIB, working mainly with public agencies, has helped in institutional and policy development, research and extension services, marketing and in the implementation of the national legislation on organic agriculture. Thanks to the abovementioned efforts, some typical local products like olive oil, fresh herbs, vegetables, mushrooms, chestnuts, aromatic and medicinal plants are exported mainly to Western countries. Various bodies provide certification services for export. The estimated value of exported medicinal plants certified as organic is more than two and half million Euro per year. However, the surface of cultivated land managed by organic farming techniques is around one percent of the total agricultural land.

In 2004 the Albanian parliament approved the Law 'On production, processing, certification and marketing of *bio* products'. Then a State Commission of Organic Production (SCOP) was established. It is responsible for policy making and the overall management of organic agriculture having also the mandate for recognition and authorization of certification bodies operating in the country. A technical secretary is charged with daily operations.

More recently, the Ministry of Agriculture, Food & Consumer Protection (MAFCP) has elaborated a National Agriculture and Food Strategy for the period 2007-2013. This strategic document, adopted by the Council of Ministers, includes a precise area target for organic agriculture (5% of the total agricultural area managed organically by 2013) and an Action Plan, with policy objectives and measures identified in five complementary priority areas, namely *i*) national organic agriculture policy; *ii*) national organic legislation and system; *iii*) organic supply chain management; *iv*) organic research, education, training and extension and *v*) international networking.

*(continued)*

19

**BOX 8** *(continued)*

In 2008 - only one year after the very first introduction in Albania of a direct payment scheme for agricultural crops and in line with the Action Plan recommendations - two specific support measures for organic agriculture have been launched:

- covering of 50% of the certification costs paid by farmers (for cultivated crops only)
- biological control pilot projects in 3 regions (control of the olive fly infections by echo-traps).

The procedure to apply for financial support for certification is very simple and transparent. Farmers receive money on the basis of documentation provided by certification bodies, which can be easily verified. Putting this little "seed" money into the sector is also expected to create and/or increase the market for local certification bodies and to "mobilize" other actors in the organic system.

Careful consideration of the present country and sector-specific conditions led to the adoption of such a pragmatic approach to start supporting the sector. The state budget for agriculture is limited; a well-designed national support program for organic agriculture and accurate official statistics are still missing; getting the necessary documentation from producers remains difficult; an adequate monitoring structure is not in place yet.

An assessment of the newly introduced support measure will be conducted shortly to decide about its future. The evaluation will be based on the feedback and proposals received from farmers and other stakeholders.

Organic agriculture is already integrated in the programs of public extension services and many activities to promote the transfer and dissemination of know-how among Albanian producers are now implemented. A good relationship and a coordinated plan of action with NGOs are established.

The marketing of organic products is promoted through periodical open day markets and 'organic corners' in local markets and supermarkets. In addition the ministry supports the participation of Albanian organic producers and processors to international organic fairs and events.

Anyhow, it should be noticed that enforcement of legal framework and its amendments based on the recent revision of the EU regulation have not followed the same speed.

The creation of an Organic Bureau within the MAFCP is badly needed since the existing SCOP technical secretariat has not been very effective so far.

20

Source: Tarelli I., Stamo B. (2008) paper presented at the 3<sup>rd</sup> MOAN meeting 5-8 March 2008, Damascus, Syria.

## Case studies<sup>1</sup>

### Case study I

## GOVERNMENT SUPPORTS FOR ORGANIC AGRICULTURE IN THE MAGHREB

Lahcen Kenny<sup>2</sup>, Samia Maamer Belkhiria<sup>3</sup>, Khadija Arif<sup>4</sup> & Nadia Hadjeres<sup>5</sup>

### Abstract

The movement of organic agriculture was launched in the Maghreb in the early nineties by Morocco and Tunisia. Algeria has recently joined the movement through a few regional projects while Libya is still behind with no organic production at all. Total certified agricultural land or under conversion in the three main countries (Algeria, Morocco and Tunisia) reached 336,678 ha in 2007 with the highest share (67%) for Tunisia. Fruits, vegetables and oils are the main commodities produced organically in these leading countries. Most of the productions are sold on a foreign market, that is to say that export was, and still, the main driving force behind the emergence of the organic sectors in the Maghreb. The first experiences were initiated by the private sector with little or no help from their respective governments. In a few cases cooperatives of small holders with the help of international agencies played a pioneer role in some regions (i.e. the south of Morocco). Government support has become implicit only when pioneer projects with export-oriented crops such as olive oil in Tunisia, citrus fruits and vegetables in Morocco and date in Algeria has proven to be worth backing up since they opened new opportunities for export, job creation and agricultural land uses. As the level of consciousness increase at the decision-makers' level, government support was intensified and concretized by a series of financial, organizational and/or institutional actions, some of them are directed specifically at organic growers, but very often government assistance is by indirect means. In some countries organic agriculture has recently emerged as a strong political issue like in Tunisia where the promotion of organic agriculture was clearly posted as a priority in the 2004 presidential election. As a result, the Tunisian Government is actually playing a prominent role in promoting the organic movement downwardly through a well defined and structured action plan closely articulated and carried out by ministerial bodies at central and regional levels. In Algeria, although organic agriculture was recently added to the list of priorities in the national plan for agricultural development, there is yet no concrete impact of the actions and services offered on production or trade of organic foods. Tunisia and Algeria are the first and only Maghreb countries

<sup>1</sup> The two case studies included in the present work were prepared for the Conference on 'Government Support Policies for Organic Agriculture. Experiences and lessons from around the world', IFOAM 16<sup>th</sup> Organic World Congress Cultivate the Future 16-20 June 2008, Modena, Italy.

<sup>2</sup> Institut Agronomique et Vétérinaire Hassan II, Agadir, Morocco.

<sup>3</sup> Ministère de l'Agriculture et des Ressources Hydrauliques, Tunis, Tunisia.

<sup>4</sup> Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco.

<sup>5</sup> Ministère de l'Agriculture et du Développement Rural, Alger, Algeria.

where farmers can profit from financial subsidies specifically allocated for organic farming. In the case of Morocco, the government is not yet a key player in the sector but initiatives from different ministries have been undertaken for several years at national and regional levels to promote organic business with individuals and farmer cooperatives. The Moroccan government gives no direct incentive for export, but the business has been steadily increasing for the last ten years due to the ever increasing demand for organic fresh fruits and vegetables in Europe. Unlike Tunisia and Algeria, the spread of "organic consciousness" in Morocco is moving upwardly from the base and from the regional levels to the national and central levels. None of the Maghreb countries has so far developed any kind of support directed to local markets and local consumptions. Except in Tunisia where operators are quite well organized, in the rest of the Maghreb countries organic professional organizations are still weak or absent. As for research and training, several public institutions are involved in R&D programs linked to organic farming but with a little or no coordination. Tunisia is the only country where specialized public institutions with proper funding were created. All Maghreb countries pretend to use organic agriculture as a tool for food security and sustainable management of their natural resources but have allocated no funds and designate no measure to fulfil such objectives.

### Introduction

This paper analyses government support for organic agriculture in the Maghreb area. Two countries, namely Morocco and Tunisia, have been taking the lead for the last 15 years. The comparison addressed in this paper is based on the data about these two countries and Algeria. Government support was assessed through the official declarations, the objectives posted, the actions and measures actually engaged and the accomplishments so far achieved in promoting organic farming and/or organic wild collection. The main goal is to depict strong and weak points from the Maghreb experience and draw key recommendations for future prospects.

### Place of organic agriculture in the general agricultural policy

The interest for organic agriculture in all three countries is linked to the general interest in the agriculture sector as one of the key factor for economic growth, poverty reduction, job creation and export empowerment. Government documents show that organic agriculture is clearly posted as a priority in the national agricultural development program in the case of Tunisia and Algeria<sup>6</sup>. In the case of Morocco organic agriculture is not explicitly mentioned in the 2020 strategic plan for rural development but it is seen as one of the tools to fulfil some of the objectives outlined in the general strategy. In some countries organic agriculture has recently emerged as a strong political issue like in Tunisia where its promotion was clearly mentioned as a priority in 2002<sup>7</sup> and reiterated in the 2004 presidential election. As a result, the Tunisian Government is actually playing a prominent role in promoting the organic movement downwardly through a well defined and structured action plan closely articulated and carried out by ministerial bodies at central and

<sup>6</sup> The XI<sup>th</sup> Social and economical Developmental Plan (2007-2011) for Tunisia and the National Plan for Rural and Agricultural development (2000) for Algeria.

<sup>7</sup> The X<sup>th</sup> Social and Economical Developmental Plan (2002- 2006).

regional levels. In the rest of the Maghreb countries government support is either absent (in the case of Libya) or weak (in the cases of Morocco and Algeria).

The early development of organic farming in all three countries has been mostly initiated by private companies. In a few cases cooperatives of small holders with the help of international agencies played a pioneer role in the promotion of organic wild collection at regional levels (i.e. south of Morocco<sup>8</sup>). Government support has become implicit only when pioneer projects with export-oriented crops such as olive oil in Tunisia, citrus fruits and vegetables in Morocco and dates in Algeria have proven to be worth backing up since they opened new opportunities for export, job creation and agricultural land valorisation. As the level of consciousness increase at the decision-makers' level support from various government agencies was intensified and concretised by a series of financial, organisational and/or institutional actions, some of them are directed specifically to organic operators, but the majority are in indirect forms.

In Tunisia, as in Morocco and Algeria, the main objectives for developing organic agriculture are to:

1. Improve exports of fresh and transformed foods
2. Improve and sustain food security for basic foods
3. Improve the sustainable management of natural resource
4. Improve social and economic conditions of farmers

## Production and export

23

Total area allocated for organic productions reached 336,678 ha in 2007 of which more than 65% are for wild plantations and/or pasture land and about 30% for fruit trees (Table I). Major commodities include vegetables, citrus fruits, dates and olive oil. Morocco's main products are tomatoes, zucchini, peppers, cucumbers, melons and green beans, oranges and Argan oil, while for Tunisia and Algeria the main commodities are olives, dates, apricots and oranges.

In the Maghreb as in many other African and developing countries organic agriculture is fuelled mainly by export. Total export from Morocco and Tunisia has been steadily increasing in the last ten years (Figure 1) and reached 14,500 Mt in 2007 with the highest share (62%) for Tunisia. The main destination for all countries is Europe where premium prices vary from 0 to 40%. The Maghreb experience showed that export is indeed promising for some crops like vegetables and citrus fruits but not necessarily for others like olive oil for which the premium price in foreign markets was not always there. In these cases, the main benefit of organic certification is reduced to ensure access to the market.

<sup>8</sup> Certification of argan forest in South-West of Morocco was first initiated by women cooperative in 1998.

Table I: Certified organic land in the Maghreb countries (ha), 2007

Crops	Morocco	Tunisia	Algeria	Total	%
Fruit crops	1,674	96,825	1,115	99,614	29,58
Vegetables	593	100	1,085	1,778	0,52
Aromatic & medicinal plants	1,726	5,853	3,000	10,579	3,14
Forest	100,000	115,000		215,000	63,85
Forage crops	-	-	2,500	2,500	0,74
Cereals	-	1,746	-	1,746	0,51
Other	223	5,238	-	5,461	1,62
<b>Total</b>	<b>104,216</b>	<b>224,762</b>	<b>7,700</b>	<b>336,678</b>	<b>100,00</b>
%	30,94	66,73	2,29	100,00	

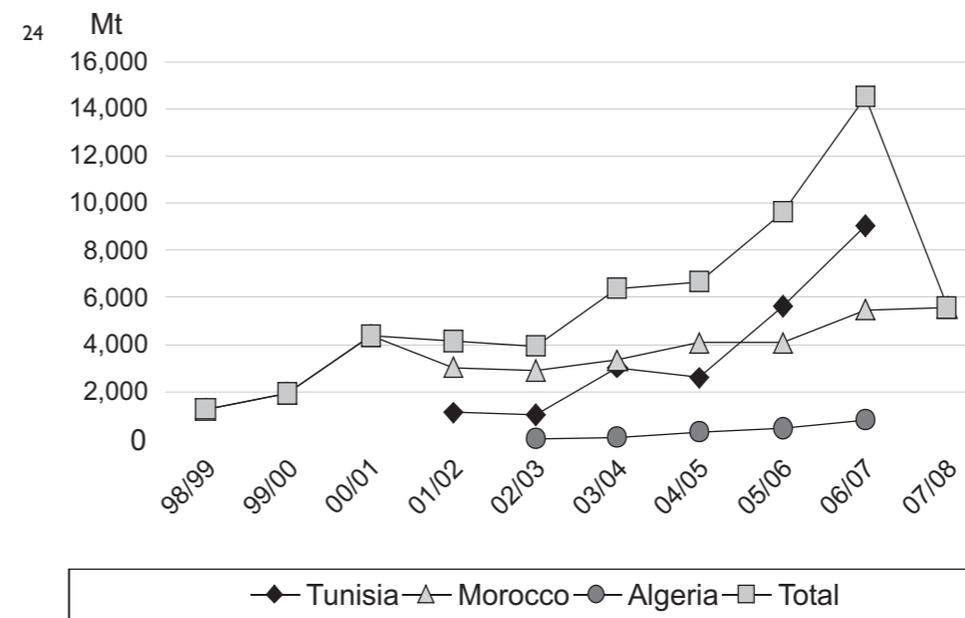


Figure 1: Organic exports from Maghreb (Mt), 1998-2007

## Regulation and certification

The issuing of a national regulation for organic agriculture is seen as the primary step any government should seek in order to promote the sector. Several benefits can be drawn from having a national regulation. A national regulation is meant to promote quality foods, ensuring their authenticity, prevent fraudulent claims, integrate environmental conservation practices into agriculture, improve export to EU countries and reduce the certification cost by empowering the creation of national certification bodies.

The first Maghreb country to issue a law specific to organic agriculture was Tunisia whose government has elaborated the first organic law in 1999. The Ministry of Agriculture in Morocco has elaborated a regulation draft in 2004 but it has never been officially validated<sup>9</sup>. As to Algeria a draft national regulation has been discussed and is currently under approval.

A number of questions are raised when the issue of national regulation is addressed in the Maghreb countries among which three seem to be detrimental.

1. Why is it that some governments (e.g. Morocco and Algeria) are doing a little or nothing about issuing a national regulation?
2. Why farmers and/or professional organisations in these countries are not reacting to the absence of such regulation?
3. What are the benefits a country can take from having its own regulation?

25

The experience of the Maghreb countries is showing that: The experience of the Maghreb countries is showing that:

1. The lack of support (or timid support) from the government is mainly due to the lack of political commitment. In fact as long as organic agriculture is not part of the political agenda and that highly ranked officials are not convinced or not aware of the strategic importance of the organic sector for their economy and environment, nothing can be done even if the rest of the administration is willing to push forward the movement (in the case of Morocco and Algeria). On the other side when political willingness is there, the issuing of a national regulation and all subsequent support becomes a question of time (in the case of Tunisia).
2. Confusion between organic labelling and other labelling systems (GI and PDO<sup>10</sup>) was and still is behind the lack of support shown by the government bodies to organic agriculture. For instance in Morocco, a strong belief was mistakenly and unintentionally spread among some officials and even small holders stating that labelling systems such as GI and PDO are more important than organic labelling for the promotion of the "terroir" products. Others believe that Globalgap and Nature's choice are similar or even better than organic certification.

<sup>9</sup> An official publication of the Moroccan law is foreseen for summer 2008.

<sup>10</sup> Geographical Indications and Protected Designations of Origin.

3. In the Maghreb countries, as in other developing countries, Organic farmers are not actively involved in lobbying for a national regulation to protect the authenticity of the goods they are producing since their main costumers are in Europe and elsewhere, therefore being certified by a foreign company on the basis of the EU regulation is, for the majority of the farmers, good enough, that is to say also that as long as the local demand for locally produced foods does not exist, there is no need for a national regulation. The passive role of organic operators is also due to the small size of the organic community in these countries which has not yet reached the critical mass that will allow strong lobbying vis-à-vis the government. Also, the majority of the farmers are small holders and illiterate. Educated and rich farmers on the other hand are not eager either to see a national regulation since they are not convinced about the immediate benefits they can take from its adoption. Some express also the fear of seeing more bureaucracy and administrative hurdles if the government's bodies get more involved in the sector. Such attitudes can, however, be easily dealt with if the role of the government is well explained to reticent people.

4. When a national regulation is adopted the question becomes how the sector will benefit from it. The Tunisian experience shows that after almost 10 years with its own national regulation, the progress made seems to be mitigated. On one hand exports of organic goods has increased and more producers were probably converted to organic farming due to financial subsidies and incentives; on the other hand exported lines of goods are still limited and no national certification bodies have been yet created, thus the certification cost is still as high as in the other countries with no national regulation<sup>11</sup>. Also, one of the appealing reasons why the Maghreb countries are looking for national law equivalent to EU regulation is because they hope to be included one day in the EU third country list in order to ease the access of their products to the EU market. Tunisia has been requesting adhesion to the positive list since 2003 and is still waiting: a disappointing course of events for the other Maghreb countries that are looking forward to embark on a similar experience.

26

## Institutional and organisational support

At the central level, all countries have assigned an office within the ministry of agriculture to take the lead on matters related to organic agriculture issues. Except in Tunisia where a senior administrator is working full time on organic agriculture issues, in the other countries, the person in charge of organic agriculture allocates less than 10% of his/her time to the organic sector issues. Central units are also lacking equipment and appropriate tools for data collection and analysis, training and communication.

Representatives from other ministries and public institutions are invited to share thought and idea in a national consultative commission (in the case of Morocco and Tunisia). In the case of Tunisia two public institutions were created to deal with extension (CTAB<sup>12</sup>) and research (CRRHAB<sup>13</sup>). Tunisia has also ministerial representative at the regional level to deal with organic issues and be the farmers' interlocutor.

<sup>11</sup> There are now four certification bodies from France, Germany and Italy operating in Tunisia.

<sup>12</sup> CTAB: Centre Technique de l'Agriculture Biologique.

<sup>13</sup> Centre Régional des Recherches en Horticulture et Agriculture Biologique.

In addition to the Ministry of Agriculture, other ministerial departments are involved in one way or another in the promotion of organic agriculture in the Maghreb countries. In Morocco and Tunisia the Ministries of Trade are involved in the management of export and import data, sometimes they are offering also direct support to farmers and industrials to attend trade fairs within the country and abroad. The Moroccan Ministry of Environment is actively involved in supporting studies on organic agriculture as a means to promote environmentally friendly production systems. For wild organic products collected from the forest, operators have to deal with forest services for all transactions related to parcel rent and administrative procedures. All in all, there are a lot of indirect forms of support offered by several ministerial department but there is little or no coordination between these departments. The lack of cooperation is certainly weakening the Government support to the sector.

### **Financial support**

Algeria and Tunisia are the only Maghreb countries where organic farmers can apply for financial subsidies and/or incentives (Table 2). In Tunisia, the Government allocates up to 30% subsidies for the equipment and 70% of the certification costs. A national prize for the best organic producer is worth 10,000 euro. Algerian farmers can also apply for a national subsidy (Table 2). Tunisian farmers are apparently well acquainted with the subsidy system while in Algeria the system is not yet well grounded; no request has so far being placed to benefit from such measures. The impact of such measures has never being well assessed but they are in general welcomed and appreciated by farmers.

### **Research, training and extension**

27

Higher education institutions have developed specific courses in organic agriculture in all three countries (Algeria, Morocco, and Tunisia) at the Master Degree level<sup>14</sup>. Students from these countries are also participating in the CIHEAM-MAIB Master program on Mediterranean Organic Agriculture. Programs for short term training sessions are also organized at central and regional levels for farmers, technicians and engineers on various topics of organic agriculture. In the case of Tunisia, the CTAB has been actively involved in professional training since 2005. A school farm targeting farmers was also launched in 2004 within a TCP/FAO program. As for Morocco, the decision for the training initiatives are decentralized, thus regional offices of agriculture have organized several of their own training sessions without any coordination with the central unit. Regional training sessions in Algeria are organized by the Chamber of Agriculture.

<sup>14</sup> Institut National de la Recherche Agronomique et agro-alimentaire (INRAA) in Algeria, Institut Agronomique et Vétérinaire Hassan II (IAV) in Morocco and Institution de la Recherche et de l'Enseignement Supérieur Agricole (IRESA) in Tunisia.

**Table 2: Subsidies and incentives allocated for organic farming in Algeria and Tunisia**

100 TD (Tunisian Dinar) = 54,61 EUR; 100 DA (Algerian Dinar) = 0,97 EUR

Type of subsidies / incentives	Tunisia	Algeria
Subsidies for inputs and/or equipments	investment subsidies fixed at 30 per cent of total amount of equipment and tools specific to organic projects	up to 10000 DA/ha (for inputs only)
Subsidies for the conversion period	annual subsidies over a five-year period to cover inspection and certification fees, equivalent to 70 per cent of the cost, provided that the overall value of the subsidies does not exceed 5,000 TD	variable per ha payment fixed annually depending on crop type
Area payment subsidies	-	3 – 50 DA/ha depending on crop type
Prize of excellence	annual presidential prize for the best organic producer	-
Subsidies for export	(indirect support measures only)	variable per kg payment fixed annually depending on product type

## Conclusion

Government support for organic agriculture in the Maghreb area is either totally absent due to ignorance and/or low awareness of the decision makers (in the case of Libya), timid when a clear political commitment is lacking (Algeria and Morocco) or strong as it is in Tunisia. When actions are taken by the Government, very often they are of an indirect nature, involving several ministerial departments without or with a little coordination. Consequently, the progress even in the leading countries was slow focusing mainly on export-oriented crops. The general policy followed by all countries where a strong bet was placed on the premium prices in the foreign markets has been shown to have its limits since some organic produces were not always rewarded by a premium. Critical issues such as local markets, diversification or organic productions and the emergence of national certification bodies are either not appropriately addressed or not strongly emphasized in the governments' vision, therefore the general policy of the Maghreb countries needs to be readjusted to attach more importance to these issues in order to really boost the sector.

## Case study 2

### STEPS LEADING TO THE “NATIONAL ACTION PLAN” FOR ORGANIC AGRICULTURE IN TURKEY

Uygun AKSOY<sup>15</sup> and Müfit ENGİZ<sup>16</sup>

#### Abstract

Organic farming started in Turkey in the mid-1980s due to the demand coming from the enlarging European organic market. Since then many activities have been performed through non-governmental organizations especially during the early phase of development and further by the Ministry of Agriculture and Rural Affairs (MARA). The preliminary efforts focused on training, research and institutional building including the issuing of relevant legislation. A structure that extends to the province level through the organic teams is accomplished through in-service training programs carried out since 1997. The organic production was mainly for the export market however the domestic market is also accepted as a priority. The Law for Organic Agriculture has made 30 minute organic broadcasting compulsory for every TV channel. In 2007, these efforts contributed to the preparation of the 'National Action Plan for Organic Agriculture' in Turkey. Turkish experience that led to the 'National Action Plan' can be an example of a strong basis that will contribute to the implementation and monitoring built through cooperation between the State (MARA), NGOs (ETO) and other stakeholders (National Guidance Committee). Actions taken during this phase, legislation, training, research, data collection, institutional building, integration into rural development and environmental protection policies will contribute to the rapid and sound development of organic agriculture. Even if there is no significant financial support for organic farmers, all other supportive measures and further inclusion of organic as a priority area in national strategy for rural development and in EU-pre accession assistance for rural development (IPARD) are expected to ease the national action plan.

#### Historical background: good and bad practices

In Turkey the initial stage of organic farming is similar to the other developing countries. It started upon the demand coming from Europe in mid 1980s during the rapid growth of the European organic market. Turkey was and is known as the prime producer of dried fruits and nuts, and the first organic products were these traditional goods. For nearly a decade, organic production followed the private rules of the certification bodies and later EU legislation. The first Turkish regulation on organic agriculture was issued in 1994 and was similar to the EC 2092/91 in its essence. One of the milestones in the Turkish organic movement was the establishment of a non-governmental organization, ETO, the Turkish Association of Organic Agriculture. ETO acted as the major source for dissemination activities on organic agriculture.

<sup>15</sup> Ege University, Faculty of Agriculture, Department of Horticulture; Association of Organic Agriculture (ETO) İzmir, Turkey.

<sup>16</sup> Department of Alternative Agricultural Production Techniques, DG Agricultural Production and Development, Ankara, Turkey.

During the initial stage, priority was given to education and training activities. The first training program was organized in 1997 as a three week course for extensionists of the Ministry of Agriculture and Rural Affairs (MARA) with the support of ETO and Ege University. The aim was to train MARA staff in every province. There were discussions about the location of the course whether to organize at regional level or to have a central location. The Ministry decided to organize it in Izmir, the province where all organic activities had concentrated even though a regional perspective could have allowed exchange of experiences among participants facing similar problems. This first experience was not very successful since the course gathered a group of agricultural engineers from different provinces who were invited according to the alphabetical order of provinces rather than listing provinces according to their ecological conditions. The performances of the following training programs were much higher. At the end of two years, 2-3 engineers per province were trained and a special seminar was organized for the directors. The follow-up activities, however, revealed that all except two of the staff trained on organic agriculture were sent to other provinces and assigned duties other than organic agriculture. After this, short training programs for trainers were organized yearly. Within the MARA structuring, organic teams are now established in every province for the training of farmers, the number varying from 2 to 6 according to the importance of organic production in the province. These teams were formed as a consequence of these short courses. Such in-service training programs are still continuing.

Data collection is a vital process in organic agriculture, and reliable and updated data are the basis for successful strategic planning. ETO started to collect unofficial data in 1990 through the inspection and certification bodies. When the first regulation was put into force, the Ministry was officially responsible for data collection starting in 1996. In January 1996, a regulation contained an article which made the declaration of all organic goods that are exported compulsory. Today, the Ministry has set up a system which is complying with the EUROSTAT.

The MARA decided to support research on organic and the start was to allocate a budget to almost every research institute of MARA to initiate projects. Short courses were then modified to address researchers in the national agricultural research system (NARS). During the first two years, research projects were proposed mainly to test various organic fertilizers in certain crops. However during the second phase, research objectives are more oriented towards problem solving or optimization of organic production and the methodology is much more advanced. There is a yearly meeting held by MARA DG Agricultural Research where all projects, proposed, implemented or finalized are discussed with the presence of all interested parties. A network of Learning Centers composed of NAR centers already evolved in organic research is foreseen in the National Action Plan.

In the 1990s, organic agriculture was mainly handled by two experts working under the 'Research, Planning and Coordination' Department. The major change occurred when the 'Alternative Agricultural Techniques' Department started to operate under the General Directorate for Agricultural Production and Development within the Ministry in 2003. There are two committees supporting the Department: Organic Agriculture Committee and Organic Agriculture National Guidance Committee. The first one is composed of members coming from related departments of MARA and has the mandate to take decisions. The second committee is more an advisory one and gathers members from different ministries, universities, professional organizations and non-governmental organizations. Through this structuring MARA has developed a structure which can link related Departments as well as all stakeholders. One of the tools to achieve the objectives stated in the National Action Plan is the stakeholder network.

To strengthen the capacity of MARA, the Turkish State Planning Organization supported a framework project on

organic agriculture that possessed training and research activities. A FAO TCP project was executed to increase awareness for organic agriculture with a special focus on different agroecosystems through which 7 workshops were organized and reflections were gathered from nearly 1200 participants at country wide level to prepare a project to further organic agriculture. A 16 month project, EUROPEAID/121154/D/SV/TR, funded by the EU for alignment of legislation and for institutional building of the Ministry was implemented between 2006 and 2007. Through this project, many stakeholder meetings are held to set a national strategy for organic farming and action plan.

In Turkey, according to 2007 figures, the area certified as organic is nearly 174,000 ha (including the area under conversion: 39,000 ha), 50,000 ha of which is for wild picking. The number of operators is 16,000 (including 5,700 farmers in conversion). Export market oriented organic agriculture is mainly carried out by contracting farmers. The contracting companies provide all the technical back-up (know-how and inputs) for the farmers and cover the inspection and certification cost. This approach is utilized only for the export and thus exerts a restriction on the development of the domestic market.

There are a number of support mechanisms for organic farmers even if the amounts are rather limited. These include (in chronological order):

- Reduced (60% reduction) interest rate of loans for registered organic farmers given by the Agricultural Bank, in total 1564 operators were given nearly 23 million Euro as operating and investment credit from 2004 to 2007.
- Additional Direct Income Support Payment for organic farms has been paid. This payment was around 15 Euro/ha for 2005 and 2006, as to 2007 it was 25 Euro/ha.

There are two major additional activities that will trigger organic agriculture. There is a protocol signed between MARA and State Water Works for implementing organic management through training of farmers in the protection zones of 13 dams. The second one is ÇATAK, a pilot project supported by MARA to introduce environmentally friendly agricultural land protection in degraded areas. The aim of these efforts is also based on Agriculture Law (No. 5488-Article 9) that accepts organic farming as a tool to conserve biodiversity and genetic resources as well as bio-safety. The Undersecretary for Foreign Trade has newly adopted two supportive actions for the exporters: support for the inspection and certification cost and support for the cost of analysis of organic samples in the case of conformity with the standards.

### **National Action Plan for organic agriculture**

MARA prepared the Turkish Organic Food and Farming Action Plan based on the National Organic Strategy finalized by MARA and the Organic Farming National Guidance Committee (OTYK) in 2007 with the aim of developing and widening organic production. The aim of the plan is stated as '*to support the sustainable development of organic agriculture and the market for organic products in Turkey and abroad, as a tool for rural development and the protection of the environment and human health in Turkey*' (Bagatur et al., 2007<sup>17</sup>).

The Organic Food and Farming Action Plan has four overall objectives:

- I. Improve implementation of policies and practical support for organic food and farming among all relevant

<sup>17</sup> Bagatur C., Ananias V., Stopes C. and Dessane D. (2007) Report on 'Turkey Organic Food and Farming Action Plan' EUROPEAID/121154/D/SV/TR, 22 October 2007.

government departments

2. Strengthen stakeholder network in organic agriculture

3. Support development of organic production

4. Support development of domestic and export markets for Turkish organic products.

Specific objectives are further proposed as:

- Use organic food and farming as a tool in achieving rural development objectives
- Enhance collaboration between MARA and all other relevant governmental departments to maximize organic production and processing
- Harmonize Turkish legislation with new EU Organic Regulation 834/07 through revision of Turkish Organic Law and Standards
- Increase capacity of MARA and other government departments to effectively implement appropriate policies
- Maximize the efficiency of stakeholder network to guide formulation and implementation of policy and practice to support organic food and farming in Turkey (production, processing and internal/export markets)
- Support development of organic farming
- Improve technical and economic performance of organic food and farming systems
- Harmonize organic standards and accreditation working with the Turkish Accreditation Institution (TURKAK)
- Promote Turkish organic products nationally for Turkish markets and internationally for export markets (awareness, common logo, slogans etc.).

Besides these, 22 operational objectives and 52 indicative actions are proposed, prioritized according to their impact factor and responsible identified in the action plan.

32

## Integration of organic agriculture into Rural Development Programs

Organic agriculture matches with objectives related to rural development as mentioned in the 9<sup>th</sup> Development Plan (2007-2013), Agriculture Strategy Paper, National Rural Development Strategy and EU pre-accession assistance to rural development (IPARD) in Turkey.

National Rural Development Strategy prepared for 2007-2013 for Turkey also integrates organic agriculture. The strategy sees: i) *“Existence of organic farming potential”* as an existing strength of rural Turkey for building upon and ii) *“The development of consumer consciousness and increase in demand for healthy, quality, organic products”* as an opportunity to *“increase agricultural competitiveness and income”*.

Organic agriculture is stated under two strategic objectives aiming at *“Economic Development and Increasing Job Opportunities”* and *“Improving Rural Physical Infrastructure Services and Quality of Life”*. As a priority to increase competitiveness in agriculture and food, investment support will be provided for *“sustainable use of local knowledge, skills and resources to diversify the agricultural production by such activities as...organic farming”*. As another priority it is mentioned that, *“measures will be taken and activities will be supported for spreading organic agriculture and good agricultural practices”* in order to improve environmentally-friendly agricultural practices (Redman, 2007<sup>18</sup>).

<sup>18</sup> Redman M. (2007) Report on 'Opportunities for Organic Food and Farming in the Turkey Rural Development Plan', EUROPEAID/121154/D/SV/TR, 16 November 2007.

The proposed IPARD Plan also supports organic food and farming in Turkey, and some financing lines in the IPARD Plan give priority to organic production/processing in respect to ranking.

## Conclusion

The Turkish experience that led to the 'National Action Plan' can be an example of a strong basis that will contribute to the implementation and monitoring built through cooperation between the State (MARA), NGOs (ETO) and other stakeholders (National Guidance Committee). Actions taken during this phase targeting legislation, training, research, data collection, institutional building, promotion of farmer organizations, integration into rural development and environmental protection policies will contribute to the rapid and sound development of organic agriculture.

The mandate of the Ministry of Agriculture and Rural Affairs is more limited to agricultural and food products. In other fields where organic production intervenes there is a need to get the involvement of other ministries or state offices. This is one of the specific objectives of the NAP however these related state offices are not deeply involved. With the exception of the Undersecretary for Foreign Trade, their link with the current state-of-art of organic agriculture is very limited and only through representation in the National Guidance Committee. Taking into consideration issues such as the rural development, multi-functionality, non-food products, agro-ecotourism or the domestic market, there is an urgent need to generate initiatives by these offices. One major drawback in the implementation of the NAP is the weak collaboration among state offices and lack of expertise.

The major market is still the export market, however, significant attempts are in place for the development of domestic market as the open market started by Bugday (NGO) and specialized shops of CityFarm. The action plan foresees a sound development of the domestic market in order to achieve sustainability in the supply chain.

Even if there is no significant financial support for organic farmers, the Action Plan targets further financial and technical support for the farmers. However this is going to be strongly dependent on the economic viability of Turkey during the coming years. All other supportive measures namely support for research and training and inclusion of organic as a priority area of IPARD are also expected to ease the implementation of national action plan.

33