Marketing organics in the Pacific Islands

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Executive summary

The current situation relating to the marketing of organic products in the Pacific Islands was established through the following approach:

- All countries represented on the Regional Organic Task Force were written to advising of the survey, and then the survey was forwarded. This approach was not entirely successful.
- The consultant visited Fiji, Papua New Guinea, Vanuatu, New Caledonia and the Solomon Islands. Within these countries, discussions were held with certified organic organizations, relevant NGO and private sector organizations, and government officials. Discussions / visits were held with hoteliers; restaurant and café operators; market stall holders; food processors; food retailers; shoppers and consumers in hotels, restaurants and market places.

The current survey was able to draw upon three pieces of recent research that provided a great deal of relevant information.

As a first step, the status of organics in the Pacific Islands was assessed, in terms of what organizations and products are presently certified, and by whom, for the ten countries. This was undertaken through a combination of interviews with the relevant organizations, discussions with organic representative organizations, discussions with government officials, and internet research. In collecting the data one needs to distinguish between organizations that have previously been certified and those whose certification is current. A number of previously certified organizations appear to have not maintained their certification for reasons of outright costs and costs associated with disrupted production.

Demand was analyzed from two perspectives: by residents and by visitors/tourists. Demand by residents was analyzed from the perspective of end-consumers, retailers, and food manufacturers. As visitor numbers in the Pacific are higher than the population of a number of countries their demand was considered important. Their demand was assessed through interviews with tourist staying in resort hotels.

Overall, the present demand within the Pacific Islands for organic produce appears to be very low.

An effort was made to assess what needs to change in order to develop a vibrant and successful organic industry. Three elements were identified: demand parameters, supply parameters, and a regulatory environment conducive to genuine organic products.

It considers that the Participatory Guarantee System is an excellent scale-friendly model in which to base organic production in the Pacific Islands. However, there is now a need to pay as much attention to the consumer side of the scheme as that being given to the production side. It is considered that wholesalers, retailers, and the food service sector can play a pivotal role as a conduit to servicing the end-consumer.

The present survey recommends that efforts now be undertaken to protect the term "organic" through appropriate national legislation. There is also a need to put considerable effort into advising growers how to grow organically. The costs of producing organically also need to be thoroughly reviewed and better documented.

1. Approach

The current situation relating to the marketing of organic products in the Pacific Islands was established through the following approach:

- All countries represented on the Regional Organic Task Force were firstly written to and then the survey was forwarded. The survey is attached in Appendix 1. Reminder emails were sent several times to those from whom no response was received. The response to this survey was rather poor.

- Field visits were made in Fiji, Papua New Guinea, Vanuatu[1], New Caledonia[2], and the Solomon Islands. Within these countries, discussions were held with currently certified organic organizations, representative organizations[3], and government officials. Discussions / visits were held with hoteliers; restaurant / café operators; market stall holders; food processors; food retailers; shoppers and consumers in hotels, restaurants, market places.

It is noted that the Survey was able to draw upon two pieces of recent research that provided a great deal of information relevant to the Survey. The first, Young and Vinning (2006), related to Fiji. In that survey, 46 tourist hotels, 33 restaurants, and 21 supermarkets were interviewed in regard to the factors that influenced buying decisions of local produce. Whilst the issue of buying organic products was not precisely raised by Young and Vinning, the multi-faceted issue of "quality" was raised. The second, Vinning (2008) specifically looked at the issue of "clean / safe" production of fresh produce in the peri-urban environment of Port Moresby, Papua New Guinea. This has a direct bearing on the demand for organic product. The Survey was also able to draw upon the findings of the (currently) unpublished report by Gernioux (2008) that surveyed consumers in Nouméa as to their attitude towards organics.

2. Current status of organics in the Pacific Islands

The status of organics in the Pacific Islands is presented in Table 1 below. The Table was constructed by a combination of interviews with the organizations involved, discussions with organic representative organizations, discussions with government officials, and internet research.

[1] In Vanuatu, Mr Nambo Moses, from the Department of Agriculture and the Vanuatu representative on the Regional Organic Task Force, was of great assistance. Through him I met a number of actors involved with organics. All were aware closely of the Pacific Organic Standard. Clearly Mr Moses is in close collaboration with them and properly represented their views to the ROTF and, in turn, brought the outputs of the ROTF back down to those involved.

[2] Ms Judith van Eijnatten, Chargée de la vulgarisation par des méthodes participatives (PTOM) CPS - Secrétariat général de la Communauté du Pacifique, Division Ressources terrestres, Noumea, provided excellent assistance and valuable insights.

[3] Examples are Farmers Support Association in Vanuatu and the Fiji Organic Association in Fiji.

Table 1. Status of organic certification in the Pacific

Country	Organization certified	Certifier	Products certified and market destination	Comment
Cook Islands	Pacific Trading Co. Ltd. Cook Islands	Agriquality (NZ) BIOGRO NZ	Noni juice	
	Cook Islands Noni Marketing Ltd. Tikikaveka	BIO Grow NZ	Noni juice	
	Nonimana Inc. Ltd Rarotonga	Assure Quality (NZ)	Noni juice	
Fiji	Agrana Fruit (Fiji) Ltd Sigatoka Part of the world wide Agrana group.	Australian Certified Organic	Banana, mango, guava purees. Sliced banana pieces. Other Agrana products (drinks, jams, tomato sauce) are not claimed to be organic. Markets are other parts of the Agrana empire, but mainly in Australia. Would like to re-establish itself in USA markets.	
	Herbex Ltd Lautoka	ACO Hence JAS, USDA Organic Production certification based on wild harvest. Processing plant in Lautoka also certified.	Noni juice, certified noni fruit and leaf powder. Other noni products (fruit oil, leaf oil, crème, lotion, soaps) are not certified. Europe	

Country	Organization certified	Certifier	Products certified and market destination	Comment
Fiji	Spices of Fiji Based at Wainadoi. GPO Box 120, Suva.	Ecocert (previously BioGro) Has been certified since the mid-1980s. Works with around 250 outgrowers in locations on Viti Levi and a number of islands	Black pepper, vanilla and vanilla products, nutmeg, mace, cinnamon. Domestic market and exports to Australia, New Zealand, New Caledonia.	
	Organic Products Limited			Despite the name the company does not claim to market organic product as it does not have organic certification. Presently seeking organic certification for its virgin coconut oil.
French Polynesia	Private farmers	BioAgriCert Polynesie Oko BSS	Various fruits, vegetables from market gardening. Tamanu Oil (from *Calophyllum inophyllum*) Noni Vanilla	The farm Eden Parc operated by Mr Gilles Parzy has over 100 fruit and vegetable species. Since the entire farm is certified organic, then all horticultural products grown on the farm are certified organic.[4]
New Caledonia	De Lauza	Agriculture Biologious Ecocert	Bread	All ingredients are certified organic in France and are imported into Nouméa where a baker then "assembles" the ingredients and bakes the bread in a certified environment.

[4] Pers.comm. Mr Parzy, December 2008.

Country	Organization certified	Certifier	Products certified and market destination	Comment
Niue	Niue Island Organic Farmers Association	BioGro New Zealand	Noni, vanilla	
	Niue Honey			Was certified by BioGro New Zealand from 2001 – 2003. Currently not certified as had previously sugar feeding the bees in order to save them following Cyclone Heta. Is in the process of seeking recertification. Certification will extend to apiaries and the extraction facility. Biosecurity rules in New Zealand prohibit the export of propolis from Niue to NZ. This indicates, at this stage, a change in processing procedures so that only concentrate is exported to NZ.[5]
Papua New Guinea	Hidden Valley Plantation Wandumi Rd, Wau, Morobe Province	NASAA	coffee	Efforts to contact by phone were unsuccessful. Not on NASAA's website as of November 2008
	Coffee Connections Limited Goroka, Eastern Highlands Province	NASAA	honey	Efforts to contact unsuccessful. On NASAA's website as of November 2008

[5] Pers.comm. Mr Tim Oliver, Niue Honey Company, November 2008.

Country	Organization certified	Certifier	Products certified and market destination	Comment
Papua New Guinea	Pacific Spices PO Box 1593 Rabaul, East New Britain Province Neinduk Plantation, New Kavern Plantations	NASAA	**Fruit** passion fruit, coconut, papaya, cocoa **Vegetables** cassava, chilli, ginger, sweet potato, taro, **Herbs and Spices** black pepper, cardamom, Chinese chilli, chives, cinnamon, coriander, curry-leaf tree, fennel, lemon balm, lemongrass, mixed herbs, mixed spices, nutmeg, oregano, parsley, peppermint, sage, sweet basil, turmeric, white pepper **Nuts:** *Calophyllum inophyllum* nuts ("Tamanu") *Canarium indicum* nuts ("Galip nuts") I**ndustrial crops** cherry coffee, cocoa **Aromatic Plants** betel leaf, betel vine, citronella grass, eaglewood, neem, rose geranium, rosewood, sandalwood, vetiver grass	NASAA also certifies Escential Extracts Limited as a Producer - Grower Group. Escential Extracts is a joint venture between Pacific Spices and Agmark, probably the largest cocoa exporter in East New Britain.
	Big Bean Coffee Ltd Port Moresby Contact address is PO Box 137, Wau. Appears to be part of Hidden Valley organization	NASAA Certification relates to producer-grower groups: 459 growers in 10 locations are specifically identified.	coffee	Efforts to contact unsuccessful. On NASAA’s website as of November 2008. Reference only to producer – grower groups.

Country	Organization certified	Certifier	Products certified and market destination	Comment
Papua New Guinea	Yha Hauka Kopi Ltd Aseki, via Lae Highlands Highway Lae, Morobe	NASAA	Coffee	Appears Menyama Organics was part of Yha Hauka Kopi that was also certified by NASAA. Was advised that Menyama Organics has ceased certification – pers.comm. Mr Jon Yogiyo, Goroka, November 2008.
	Arabicas Pty Ltd Quality Coffee Roasters of Papau New Guinea Goroka, Eastern Highlands Province	ACO	coffee	Initially owned by Swiss who set up the certification. Now owned by Koreans. Operations visited in May 2008. Unsure of current status.
	Monpi Coffe Exports Goroka Eastern Highlands Province	CERES (CERES GmbH, Vorderhaslach 1, 91230 Happurg, Germany)	Coffee Certification relates to 198 growers on 194 ha of land in the Wau area and processing mills by Goldfield Coffee (Wau), the Nowek Mill (Goroka) and Monpi Cofee Export (Goroka) with exports by Monpi Coffee Export.	Monpi Coffee Exports has certification for CAFÉ Practice (Starbucks), UTZ, and Fairtrade.
	Kokoda Organic	NASAA	Coffee	Web site states that it is certified by NASAA but this is not confirmed by the NASAA site.
	Kongo Coffee	Kundiawa, Simbu Province		Claims its coffee is organic but no evidence of certification given.

Country	Organization certified	Certifier	Products certified and market destination	Comment
Samoa	Women in Business Development, Apia Under the same license are: Grower group of over 200 farms plus sub-licenses for: ▪ Noni Samoa Enterprises Ltd ▪ CCK Ltd ▪ STARR Ltd ▪ Pure Coconut Oil Company (2004) Ltd ▪ MD’s Big Fresh Ltd	NASAA Certification is for Producer- Grower Group. Certification relates to specific products in defined locations.	black pepper, citrus, cocoa; coconut, ginger, kava, lemongrass, mixed herbs, mixed tropical fruit, mixed vegetables, noni, sugar cane, taro, turmeric, vanilla pod, coffee.	
Solomon Islands	Kokonut Pacific Solomon Islands Ltd	NASAA Certification is for Producer – Grower Groups.	Coconut oil	
Vanuatu	Kaoka Based on the Vanuatu Organic Cocoa Growers Association. Kaoka is based on Malekula but has its main office in Luganville on Santo because of access to appropriate shipping.	Ecocert Two sets of certification are involved. One is for area of freedom for production, based on Malekula. The other is for the shed for drying and fermentation.	Cocoa Kaoka has just the one buyer who is based in France. The buyer pays a premium for the cocoa. The product is sold ungraded. In 2007, the Cooperative exported 313 tonnes to the French buyer. Was advised that around 3,000 producers are involved but this could not be confirmed.	The sole market for the organic cocoa is with the one buyer in France.

Country	Organization certified	Certifier	Products certified and market destination	Comment
Vanuatu	VAL Pacific VAL Pacific is the new name of Vanuatu Abattoir	BIO GRO New Zealand Four farmers (including two under the one management system), all on Efate, are certified. The abattoir, also on Efate, is certified. Beef production on Santo, that is far larger compared with Efate, could also be considered as organic but it is not certified as such. The abattoir on Santo is also not certified.	VAL Pacific produces and markets organic beef. Certified beef is exported to Australia. It also markets “grass fed beef” which is beef produced according to organic standards but for which certification has not been granted. No effort is made to market this grass fed beef as organic but it is clearly identified as being pharmaceutically-free. Markets for grass fed beef are in Papua New Guinea, Fiji, Samoa and Tonga.	Certification has switched from AgriQual to Biogrow from New Zealand largely for costs reasons. Certification costs are around NZ$2500 per farm. Abattoir certification was around NZ$8,000. The abattoir assisted with the payment.
	Venui Vanilla Co.Ltd Santo.	BIO GRO New Zealand Individual growers are certified and the processing plant on Santo is also certified. There was no vanilla certified in 2007 due to the lack of flowering. Certified products are marketed to around 10 markets. Recently, sales of non-certified product has outweighed significantly organic product.	Venui Vanilla produces organic vanilla and vanilla products from *Vanilla fragrans*, black and white pepper and pepper products , turmeric, cardamom, ginger, coconut oil, lime basil, sweet potato, and chilli *Capsicum chinense.*	Venui Vanilla is based on Santo but draws its supplies from a number of other islands. Efforts are underway to expand organic vanilla production into Tanna because of climate change-induced rainfall changes are adversely affecting flowering on Santo. More than 200 producers across seven islands are involved in what is called the Spice Network. Venui Vanilla works closely with the Farmer Support Association who in turn organizes the farmers.

Several issues emerge from an analysis of the data contained in Table 1.

2.1 Validity

In constructing Table 1 it was noted that there is a gap between organizations whose web sites and products state they are certified[6] and those whose organic certification status is currently valid. Some organizations I was able to speak with and verify their current status I was unable to contact other organizations by either email or phone. Not all organic certifiers have sites that allow for cross-checking.

Two sets of circumstances affect the decision to keep certification status current:

- Costs. Some are finding the costs of continuing certification so high that they are not maintaining their status.
- Production. Some are finding that with the high variation in production, it is commercially unrewarding to continue certification until such time as production resumes to a higher level; examples are vanilla in Vanuatu and honey in Niue.

2.2 Certifier origins

The vast majority of certifiers for products grown in the Pacific Islands were from Australia and New Zealand. The exception was a Swiss-based organization in Papua New Guinea that used a European-based certifier and those that used the trans-national organization Eco-cert.

The usual method for choosing a particular organic certifier is as follows. First, the organization seeking certification for its products should establish the market into which it wishes to market its product(s). Then it identifies which certifiers are recognized by that market. Having identified the market and recognized organic certifiers, the organization then approaches that certifier for certification.

In this regard, the reaction in the countries in the survey was interesting. One Papua New Guinea enterprise, Pacific Spices, stated that Australia and New Zealand certifiers were not recognized in its market – in this case Germany, hence its decision to use a European certifier. It is noted that the certifier for the unique situation of Kaoka Cocoa in Vanuatu is a trans-global certifier.

Nevertheless, the survey showed a number of Pacific Islands' enterprises with Australian and New Zealand-based certification that comfortably export to Europe.

On balance, it seems that the comment that the lack of recognition internationally of New Zealand and Australian organic certifiers does not hold.

2.3 First footer

There is a "first-footer" approach with certification. That is, the first certifier into a country tends to get the lion's share of the work because of the potential reduction in costs for the annual audit / inspection process for subsequent certified organizations. Only on one occasion, was this

[6] A number of products relating to organics were purchased.

issue was raised with the suggestion that the first-footer should then be made just the one certifier for all subsequent organization in order to save overall costs.

2.4 Changes in certifiers

It is noted that over the years, a number of enterprises with certification have changed certifiers. The reason given for the changes were cost savings. Some of the certifiers appear to have shown a degree of flexibility is addressing the high cost of certification and thus they have been able to maintain and secure more business.

It is for this reason that the first-footer proposal is rejected here. Rejection is based partly on the philosophical ground of institutionalizing a monopoly. But rejection is also based on the fact that those seeking certification have shown energy in finding a certifier who is willing to adjust to their needs.

3. Demand

The organically certified products available in the Pacific are shown in the Table 2 below.

Table 2. Organically certified products in the Pacific.

Product	**Countries were certified**
Herbs and spices	Fiji, Papua New Guinea, Samoa
Noni / noni juice	Cook Islands, Fiji, Niue, Samoa
Fruit and fruit juices	Fiji, French Polynesia, Samoa
Vanilla	Niue, Vanuatu, Fiji, Samoa
Coffee	Papua New Guinea, Samoa
Honey	Papua New Guinea
Virgin coconut oil	Samoa, Solomon Islands
Vegetables	Samoa, French Polynesia
Beef	Vanuatu
Cocoa	Vanuatu , Samoa

Based on the current survey, it appears that demand within the Pacific Islands for organically certified produce produced within the Pacific is very limited.

Demand was analyzed from two perspectives:

- By residents; and
- By tourists.

3.1 Residents' demand

Residents' demand for organic food was examined from three perspectives:

3.1.1 END CONSUMERS

In Samoa, Papua New Guinea, Solomon Islands, and New Caledonia consumers come in touch with fresh product marketed by growers claiming to be organic. For Samoa and Papua New Guinea this organic produce is sold through weekend markets: in Samoa it is held monthly in the capital Apia on a Saturday whereas in Papua New Guinea it is held every Sunday at the Pacific Adventist University, about 20 minutes drive from the centre of Port Moresby.
In the Solomons, direct consumer - organic producer contact occurs at the Honiara Central Wholesale Market six days a week.[7] In New Caledonia contact is daily at the central wholesale market in Nouméa, and throughout the country at regular *Marchés Communaux* and *Foires et Fêtes Agricoles.*

3.1.2 RETAILERS

Considerable effort was spent examining the shelves of supermarkets in Papua New Guinea, Vanuatu, Fiji, New Caledonia, and Solomon Islands.

In the main, the existence of organic products on supermarket shelves was minimal. Only a very small parcel of one specific product (a baby food) was seen in Papua New Guinea and Vanuatu. In Fiji, a few shops stocked organic products – Heinz baby foods, Ozganic marmalades and pasta sauce, Pureharvest non-dairy rice milk, and Soland sultanas.[8] Only one product, a jam, was seen in several shops. With the baby food, the same brand was available in the three countries. However, in Papua New Guinea there was just the one menu labeled "organic" whilst in Fiji the same brand had 10 menus. In Vanuatu, the same brand had no organic label. In Fiji, the shops visited were in the capital Suva: no survey was made of other cities. No organic products were seen in the shops in Honiara of the Solomon Islands.

The exception was New Caledonia. Two types of retailers were examined. One was a general merchandise store that markets a whole series of products, from white goods to a strong range of food items. The stores are subsidiaries of European-based retail chains: Carrefour, Casino (two in Nouméa), Géant, Super U, and Champion. An examination of these stores revealed that although organic products are sold, there is the domination of brands by the one European brand with certification being nearly exclusively by the French certifier Agriculture Biologique. In Nouméa there was a more extensive array of baby food. However, there was just the one brand. No organically certified baby food was present. One of the two Casino stores had an area with an "island" identified as organic / *biologique.*

[7] The situation in the other major markets of Auki and Gizo could not be ascertained.
[8] Other products from the same manufacturers not certified, eg Pureharvest Aussie Soy, albeit it has the statement "not made with genetically altered soybeans", and other dried fruits from Soland.

Organic area: Casino, Nouméa, New Caledonia

Nouméa also has two dedicated organic retailers. One is part of a European-based 250-chain store whilst the other is a local outlet. As part of a chain, the former is slightly constrained as to what products it can handle: it must accept French certifiers but can accept Australian and New Zealand certifiers for diet-related products. The shop has been operating for eight years. About two thirds of the space in the store was for food products with the balance being for personal care products. Even here, most of the products were certified to *Krontrollierte Naturkosmetik* and *Cosmetique naturel côntrolé* standards.[9]

The local outlet also stocks fresh product marketed as “organic” but with no certifier identified.

The interiors of the two organic retailers in Nouméa giving an indication of their size.

[9] It is noted that no other store in the countries surveyed had such certification for personal-care products.

The isolated and sporadic nature of the available organic products in the general supermarkets leads to the conclusion that the products that are available in the other Pacific nations as organic were there on an ad hoc basis and not presented as part of meeting a specific demand. The existence of other organic products is totally random confirming there is not a deliberate policy to stock organic food. This was true also for New Caledonia where in the conventional supermarkets there were only a few more organic products being retailed than seen elsewhere.[10]

The exception is the two organic retailers in Nouméa. Overall, there was a bias towards bakery / cereal products. Nevertheless, there were at least 100 different organic products for sale. With the exception of bread baked in Nouméa from organically certified ingredients, there appeared to be no certified products made in the Pacific Islands.

In Papua New Guinea, Solomon Islands, and Fiji, none of the store staff interviewed could take me quickly to "organic products", suggesting that they were not aware of the products nor was there regular demand.

3.1.3 FOOD MANUFACTURERS

Food manufacturers use organic products as ingredients in order to ensure that the overall product being produced can be classified as "organic".

Fiji is the only Pacific Island Country with a significant food processing industry in terms of the number and diversity of food manufacturers, and certainly in terms of export earnings.[11] Some organic food is produced in Fiji – selected fruit purees and fruit pieces from Agrana at Sigatoka and noni juice from Herbex at Lautoka. However, from discussions with the two operators, their sales are oriented to exports, not the domestic market. The two product groups – noni juice and fruit purees and fruit pieces – can be considered simple transformed products. Whilst I am not aware of the production of any more elaborately transformed foods in Fiji certified as organic, and no one interviewed was aware of any food manufacturer producing an organic product for sale on the domestic market, the present survey was too limited to state this conclusively.

There appeared to be no food processor in Vanuatu, Papua New Guinea or the Solomon Islands manufacturing organic products. None of the correspondents reported any elaborately transformed organically certified food products for their countries.

3.2 Tourism

Tourism in the Pacific is of major importance.

Table 2 shows the movement in tourist numbers for select countries. Combined, and with the exception of Papua New Guinea and Fiji, the total number of tourists visiting the nine countries in the Table are on a par with the resident population.

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[10] For example, in the middle of the noodle section there were three packets of organic noodles from an Australian based and Australian certified Japanese noodle maker.

[11] Approximately FJ$28 million in exports in 2004.

Table 2. Tourist arrivals in select Pacific countries: 2005 - 2008

Country	2005	2006	2007
Cook Islands	88 405	62 326	97 019
Fiji Islands	549 911	545 168	539 255
New Caledonia[12]	100 651	100 491	103 363
Papua New Guinea	n.a.	77 730	104 122
French Polynesia	208 067	221 549	218 241
Samoa	101 807	115 882	n.a.
Solomon Islands	n.a.	11 482	13 748
Tonga	55 220	57 568	n.a.
Vanuatu	125 677	153 709	167 082

Source: SPC 2008

A priori, the tourism sector offers a large potential market for organic products. This is because the visitors are accustomed to eating organic foods at home and thus could expect to seek out organic foods when visiting the Pacific Islands.

The evidence from the brief survey and from Young and Vinning (2006) and Vinning (2008) indicates that, overall, the tourist hotels in the Pacific Islands have little overt demand for organic food.

The Musket Cove Resort on Malolo Lailai Island does provide organic fresh produce to its clientele. However this organic produce is grown on its own farm on the island. The hotel has not actively explored purchasing organic fresh produce from growers on the mainland. The hotel could be considered boutique: it sees its ability to deliver organic meals as a means of differentiating itself from other hotels in the price-lifestyle market segment. Another much larger hotel, the Shangri-la's Fijian Resort on Yanuca Island on the Coral Coast would consider buying organic but does not consider organics as part of its mainstream buying program. The president of the Fiji Hotel Association noted the overall purchasing power of the tourist sector and whilst he stated that the association's members were keen to increase their purchases of local product, no unsolicited mention was made of organic food.[13]

In Vanuatu, the country's largest, and arguably one of its most exclusive hotels (Le Lagon) expressed no interest in purchasing organic produce because "guests had not asked for organic food"[14]. Other hotels catering more for the mid-range tourist reported no interest in organic food. This is not withstanding that amongst the hotels there was considerable willingness to pay for high quality produce such as spices (especially pepper) and coffee.[15] Vanuatu has a most

[12] The figures used in this table are from the Secretariat of the Pacific Communities' Pocket Book of Statistics. Representatives from the French Territories at the Regional Organic Task Force in Nadi in November 2008 stated the figures for New Caledonia seemed high. The SPC-data was checked against the wed site of the government of New Caledonia. The figures cited in Table 2 for New Caledonia are drawn from that site.

[13] Comments made to the International Trade Centre, Fruit and Vegetable and Roots and Tubers Sector Strategy Development Workshop. November 2008, Radisson Resort, Denarau, Fiji.

[14] Pers. comms. Executive Chef, Le Lagoon, Vanuatu, November 2008.

[15] Pers. comms, Vanuatu's certified organic spices producer, and a coffee producer from Tanna whose coffee was sold as "organically grown".

energetic restaurant / café sector: I was told by a food importer and distributor that she had 150 customers in Port Vila.[16] She reported no interest from her clients in organic food. Hotels interviewed in the three centers of Port Moresby, Goroka, and Kokopo in Papua New Guinea reported no interest in organic foods. There was no interest in two hotels interviewed in Nouméa. There was also no interest from two hotels surveyed in Honiara, Solomon Islands.

None of the correspondents from the Regional Organic Task Force reported hotels in their country showing an interest in organic foods.

4. Future demand for organic food from the Pacific in the Pacific Islands

Demand for food has many parameters. It can be governed by religious, cultural, dietary, medicinal and belief systems. [17] An emerging demand parameter refers to the manner by which the food is produced. The demand for organic foods tends to be based largely on the belief that the use of chemicals in the production of food has negative impacts on human heath. However, there are also other elements of health aspects: with some consumers, the existence of chemicals in some textiles / manchester can be deleterious to their health due to allergic reactions.
It is possible to develop a continuum for production. At one extreme is conventional production, that is, products that are produced using the full suite of available agro- chemicals (all too often applied at excessive rates and with disregard of withholding periods). At the other end is organic production and GMO-free seed.

Based on observations made during the present survey, it is considered that in the Pacific Islands the transition from conventional production to certified organic will require a considerable and ongoing education and marketing effort. Movement by consumers along the production continuum towards the acceptance of a certified organic product may be incremental. Further, it is considered that the movement will be dictated by consumer acceptance of what constitutes "organic". It will not be set by production parameters that declare a product(s) to be organic.

An organic sector is one that is comprised of production and consumption. For there to be a successful organics industry, there needs to be a balance between the imperatives of marketing with the imperatives of production. Further, all of this activity occurs in a conducive atmosphere of a supportive regulatory regime.

It is considered that New Caledonia provides a number of lessons that will be needed to be in place for there to exist viable organic markets.

[16] Pers.comms. Ms Cornelia Willey, Vanuatu Direct Ltd. Port Vila, November 2008.
[17] As an example of the latter, there is vegetarianism or the consumption of non-animal products; raw veganism or the consumption of vegetarian food not heated beyond a certain degree of Celsius; and variations of vegetarianism where the consumer may not eat dairy, eggs, or honey products.

New Caledonia[18]

Demand

Within New Caledonia there is a general public awareness of the challenges caused by the irresponsible use of agro-chemicals.

Starting about two years there was considerable adverse press associated with illnesses caused by the inappropriate use of agrochemicals. In one instance, one of the chemicals found in a batch of Chinese cabbage was a particularly toxic termiticide. A number of public meetings[19] were held throughout the country and considerable public ire expressed over the situation. This concern is on-going and even building in momentum.

Out of the "pesticide scandals" came several actions.

One is that there is now increased random testing by the authorities of products sold at the public markets.[20] Personnel from the authority will come to the stalls in the market and take product away for testing.[21] It is noted that the testing is only carried out on whole products, such as bananas, pineapples, and lettuce, and not the jams and chutneys also sold at the same market.

Another action has been the emergence of the concept of "Responsible Agriculture" which is in the process of being promoted by the Chamber of Agriculture. The concept refers to the holistic approach to food production with the aim of providing better linkage between consumers and producers. "Responsible Agriculture" has elements of good agricultural practices, farm worker safety and welfare, protecting the environment, and providing better market access at fair prices to produces. Farmers who comply with the principles of "Responsible Agriculture" are certified (subject to annual audits) and are given a logo that they may use to advance their marketing.

Another outcome of the pesticide scandal was the empowerment of a number of NGOs. These were already in existence but their reactions to the scandals strengthen their bargaining positions and helped them to become effective pressure groups for the entire notion of clean and safe agriculture in the form of protecting the environment or advocating greater public health.[22]

Gernioux (2008) studied the potential of organics in New Caledonia. Just under 40 percent of the interviewees stated that they would eat organic products because of their health whilst 17 percent expressed concern about the impact of pesticides on the environment. There was a Bell Curve of frequency of purchasing organic products: 7 percent of the interviewees stated they would always eat organic products, 35 percent said they would never eat organic products, with the remaining 60 percent varying in their consumption between "often" to "rarely". Gernioux (2008) found that the highest demand for organic products was for fresh fruit and vegetables. This concern reflects the fact that the most obvious connection between agro-chemicals and food is with fresh produce (especially the green leafy vegetables).

Within Nouméa there are comparable fairs and shows that act as a vehicle where small scale producers of artisanal products can meet consumers face-to-face. One outlet is the Jeudi Centre Ville theme markets that occur every Thursday as well as the weekly street markets such as at Anse Vata. New Caledonia has institutionalized through salons a form of show-and-tell where different elements of the community can present their products and/or views to others. Finally, New Caledonia has a number of producers' associations that are related to the OGAF projects that

[18] Ms Judith Judith van Eijnatten, Chargée de la vulgarisation par des méthodes participatives (PTOM) CPS - Secrétariat général de la Communauté du Pacifique, Division Ressources terrestres, Noumea, assisted in compiling this case study.
[19] The Secretariat of the Pacific Community held joint meetings at its complex in Noumea as well as throughout the country that which, amongst others, doctors spoke of the increasing incidence of cancer amongst children. Pers.com. Judith van Eijnatten, SPC, 4 December 2008.
[20] On 4 December 2008, the Minister for Agriculture announced that testing was up from 60 from a few years ago to over 200 today and the intent is to increase even further the level of testing.
[21] No payment is made and the vendors must comply. Pers.comm, vendor Municipal Market, 4 December 2008
[22] Ensemble pour la planete, Action Biosphere, Union Federale des consommateurs Nouvelle Caldeonie.

can aggregate small-scale farmer produce, arrange transport, and take the produce to markets.

At the same time, New Caledonia, or at least Nouméa, has a number of retailers that market organic products. The stores are of two types. One is a general merchandise store that markets a whole series of products, from white goods to a strong range of food items. The stores are subsidiaries of European-based retail chains: Carrefour, Casino (two in Nouméa), Geant, Super U, and Champion. An examination of these revealed that although organic products are sold, there is the domination of brands by the one European brand with certification being nearly exclusively by the French certifier Agriculture Biologique. The existence of other organic products is so random as to suggest that there is not a deliberate policy to stock organic food. However, the existence of organic product in major retailers is a positive sign.

Nouméa also has two dedicated organic retailers. One is part of a European-based 250-chain store whilst the other is a local outlet. As part of a chain, the former is slightly constrained as to what products it can handle: it must accept French certifiers but can accept Australian and New Zealand certifiers for diet-related products. The shop has been operating for eight years. The local outlet also stocks fresh product marketed as, but claimed to be certified, "organic". The existence of two dedicated organic retailers indicates both the potential of the overall market as well as being potential outlets.

Demand for organic product was seen at the wholesale markets. Vendors stated they did receive requests specifically for chemical free produce. It is noted that the word used, "bio", translates to both "natural", "organic" and "no chemicals":

Discussions with different actors throughout Nouméa revealed a demand for organic meats, especially deer.[23] However, it was difficult to assess if the demand was for the domestic or the export market. Finally, a strong demand for organic food has come from a somewhat unusual source: the local animal park which wishes to feed its animals. At the same time the animal park wishes to host an organic Sunday market.[24]

Supply

One of the outcomes of the pesticide scandal was the focusing of the pesticide discussion through the Chamber of Agriculture. This has resulted in three streams of action that will have an impact on the provision of knowledge for organic farming:

- The Chamber is working on developing responsible agriculture through "best practices". Training in handling and use of pesticides is one practice. The aim is to lead to farmers having a certificate showing that they comply with a certain standard.
- Recognizing that the three Provinces have adequate funding, the Chamber is working with the SPC and the Association Arbofruits to ensure that some of that funding is used to Provincial "organic officers".
- Trials have begun on the use of organic inputs. This is spearheaded by the work that SPC is doing developing products from fish waste. The project includes utilizing the waste for fertilizer: trials are on-going.

Within the private sector, one of the two dedicated organic stores now stocks chemicals appropriate to organic production. Whilst the size of the packaging and the volume indicate that their prime use is for the household or hobbyist, their mere existence does indicate the ramping up to commercial sizes and volumes would be merely a step wise action rather than a brand new action. This is because the types of products required and their sourcing is already known. At the same time the Chamber of Agriculture markets commercial size packs of five different organic fertilizers. It also has a range of bio pesticides. There is also a private sector operator that markets a range of bio-related production-based products.

[23] New Caledonia has a considerable population of exotic deer. Venison is both farmed and wild-harvested.
[24] Probably once a month.

Marketing

For successful marketing of organic produce, there must at least be an existing awareness and clear demand for uncontaminated and safe food. The present survey indicated that this demand is emerging in a sporadic manner in the Pacific Islands. In New Caledonia, the current level of demand may be fueled by a pesticide scandal. Nevertheless the fact that there have been dedicated organic shops well before the scandal points to a level of local demand not seen in the other five Pacific countries visited nor reported on by the correspondents from the Regional Organic Task Force. In Papua New Guinea there has been the emergence of a small demand for safe fresh produce sparked by the city-based consumers in Port Moresby directly observing a seeming over-use of agro-chemicals (Vinning 2008). In the Solomon Islands there is concern about the adverse use of agro-chemicals, although it does not seem to have reached the scandal-like proportion found in New Caledonia. It is argued that the ability of consumers to observe the excessive use of agro-chemicals will be a spur to the demand for "clean", then "safe", and then "organic" fresh produce. This will occur first in those countries where there is a high incidence of peri-urban production of, basically, vegetables. Port Moresby in Papua New Guinea and Suva in Fiji are two prime examples.

If consumers demand clean / safe / organic produce then they need to be able to access them. In New Caledonia, consumers of organic products can access products through a large number of routes: general retailers, dedicated retailers, general wholesale markets, and a series of fairs and shows. No other country in the current survey had such an outlet infrastructure in place.

For producers of organic products in New Caledonia the 27 *marchés communaux* and the 27 *foires et fêtes* provide a scale-friendly way to enter the organic market. Such markets, fairs and shows represent a ready-made avenue for farmers of a range of organic products to come face-to-face with consumers of organic products. The advantages of marketing through farmers' markets, fairs and shows compared with marketing through retailers are largely of supply. In short, retailers usually require depth and breadth of products,[25] there is usually a slotting or placement fee involved, there are strict time limits for turnover, and there are requirements such as participating in cooperative advertising.[26] Small scale producers find these conditions onerous to meet. Using the market fair outlet, small scale organic producers can match the market to their production scale and gradually build from there. Whilst the other countries surveyed do have small scale home made products for sale, most lack New Caledonia's long tradition of home-made jams, pickles, juices, honey and meat products such as sausage, smoked meat and *foie gras.*

It is noted that Samoa, Papua New Guinea, and Fiji[27] have a scale-friendly market, albeit very small and occasional, where organic produce can be purchased. But these appear to be isolated to the capitals. Samoa and Papua New Guinea can be said to have a small demand for organic fresh produce for its residents: in Fiji the demand appears to be narrowed to the tourist sector.

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[25] That is, retailers are reluctant to accept a one-off product from a supplier. Instead they like a range, say at least three types ("breadth") and at least two sizes ("depth").

[26] See Vinning and McMahon (2004) who analysed the different marketing routes for producers of gluten-free products. There are clear parallels between the marketing of gluten-free and organic products. Reinforcement of these principles came from the Managing Director of FRIENDS, Fiji's small scale processor of pickles and chutneys, albeit not organic. Pers.comms. Sashi Kiran, Nadi, November, 2008.

[27] This is the monthly ROC street market instituted by a coffee lounge.

Fiji, and Vanuatu have retailers that do stock organic products, albeit there is a high level of randomness in the stocking.

Production

In New Caledonia, the potential for the production of organic products is based on several "building blocks" being in place.

First, there is a governmental system to provide advice on pesticide-free farming. There is available a large volume of organic production extension material.[28] There are plans to provide for organic extension officers. Producers have access to several sources of bio-related farm chemicals. A local fish-based bio-fertilizer is being developed.

The present survey indicated that these building blocks are only partially available throughout the countries surveyed. Even then, they are scattered in their nature.

Venui Vanilla in Vanuatu has produced a series of pamphlets in Bislama on the production of organic vanilla. The pamphlets not only elaborate precise organic production techniques (including curing) for vanilla, they also emphasis the organic philosophy that underpins the production, that is, virtually what is involved with the "welfare" of the plant.[29] However, noteworthy, these publications have been initiated by the private sector. The Solomon Islands has the excellent *The natural way of growing food for the Solomon Islands* by Joini Tutua (with Tony Jansen). The document is in English not Solomon Pijin but has illustrations that make it easy to follow. Fiji and Papua New Guinea have no such documentation. No other country has plans to employ a dedicated organics extension officer. Organically acceptable fertilizers, pesticides and fungicides are extremely hard to find, if not non-existent. Finally, there appears to be no institutionalized support for small scale producers who will be the heart of any organic sector.

Conducive regulatory control

Government regulatory control is part and parcel of life in New Caledonia. Consumers have become accustomed to and have faith in government regulations. There is an existing system that can assure them of control over the residue levels on fruit produce at the wholesale markets. Producers in New Caledonia are well used to the climate of regulatory control. In the public sector there are organizations such as ERPA[30] that provides quality control through a form of branding. SIVAP[31] provides regulatory quality and hygiene control over the animal, food, and phytosanitary sectors.

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[28] There are at least three publications on composting and ones on using neem and derris as organically based pesticides.

[29] (a) *Vanilla agriculture and curing techniques*: Piero Bianchessi, supported by Farmers Support Association, PITIC, March 04

(b) More simple – *Vanilla Curing*; FSA 2003

(c) Stret fasin blong planem vanilla long Vanuatu: FSA with help from EU's POPACA Project 2006

(d) Toksave blong oganik. FSA 2007 with POPACA

[30] Établissement de régulation des Prix Agricoles.

[31] Service d'inspection Vétérinaire, Alimentaire et Phytosanitaire

There is also the private sector *Institut de la Qualité* that assists, amongst others, producers to work to quality standards. New Caledonia has adopted the French system of *appellation d'origine controlée*, or the certification of defined products from defined regions made using defined techniques. Examples were seen of products bearing *appellation côntrolée* logo from a number of regions in New Caledonia. In a way, organics are a form of *appellation d'origine controlée*.[32]

It is argued that such a climate makes the public more ready to accept with confidence yet another form of regulatory standards, in this case organic standards. At the same time, the same conducive regulatory climate makes producers more likely to comply with yet another set of standards. The difference for producers with organic standards is that the control only operates for those who choose to adopt the system.

None of the Pacific Islands countries surveyed had anywhere near the same degree of conducive regulatory climate. That I am aware of, no regular random residue testing occurs outside of French Territories. Such testing would help make consumers more aware of the often harmful levels of chemical residues in conventionally produced food and heighten interest in organically produced food. I am aware that some of the countries have the facilities to undertake this but don't / can't because, variously, they lack trained staff, there are insufficient reagents to conduct regular tests, or the equipment is not working. Institutionalization of the notion of quality is lacking and there is no system of accreditation associated with the achievement of a quality standard. Accordingly the work of the ROTF in developing the Regional Organic Standard is considered a crucial starting point,

[32] It could be argued that during the present survey I was given a number of examples of the association of quality with particular regional products: kava and virtually anything else that is grown on Tanna in Vanuatu, taro from around Lae in Papua New Guinea, taro and kava from Taveuni in Fiji. The difference between these examples and New Caledonia is that the French tradition in New Caledonia has encouraged the institutionalization of excellence through the *appellation côntrolée* system.

Above left shows overall poster taken at Nouméa's central wholesale market.

Top right shows detail of quality control logo for beef.

Bottom right shows a number of quality certifications for poultry.

5. The way forward for organics in the Pacific Islands

Without the three pillars of demand, supply, and a conducive regulatory regime being in place, it is unlikely that there will be a sustained growth in organics in the Pacific Islands in the near future.

The Participatory Guarantee System (PGS) is an excellent starting block. This is because it is scale-friendly and highly flexible. The aim is to use the Pacific Organic Standard (POS) as the standard that PGS would work towards. It should be noted that the PGS may not be appropriate for all Pacific contexts – small countries or those with strong hierarchies may have difficulty in a self regulating system like PGS. The starting point is that product will be produced to a mutually agreed standard, viz. Pacific Organic Standard.

However, it needs to be borne in mind that there are two sides to a PGS: producers and consumers. The former tend to be more readily able to form a group than the latter. For example, there are vastly more examples of producers forming into cooperating arrangements in the Pacific compared with consumers' cooperating arrangements. To be successful, PGSs need consumers. Thus, promoters of PGSs schemes, especially those that relate to organics, need to be simultaneously nurturing consumer and producer groups.

There does exist a ready source of consumers who could participate in a PGS. These are not end-consumers but rather the intermediaries who supply end-consumers. These are wholesalers, retailers, and operators within the food service sector. Of particular importance here are hotel operators, especially tourist hotels who seek to differentiate their product through methods such as being "clean", "environmentally sensitive", and "organic". Such "consumers" need to actively invited to participate in PGSs.

PGS also does not need to lead to third party audit, that is only currently required for export markets. It is expected that PGS will be sufficient in many local Pacific Islands markets, however PGS may not be appropriate in some local structures and contexts and would not always be sufficient.

I now turn to other issues that arose from this survey.

6. Non-certified organic product

Educating consumers about labels and recognized certifiers is considered the single-most important step for protecting the meaning of the organic label in the Pacific Islands. As has been noted above in the section dealing with conducive regulatory regime, the current survey showed that considerable effort has gone into developing organic standards and the veracity of those standards. In addition to public education on organic produce there will likely need to be a determined effort into protecting those standards from a marketing perspective. However, one needs to be realistic about effectiveness of Government regulation and control in the Pacific Island nations and consumer/farmer education, industry monitoring or self-regulation may be more important.

The word "organic" has a specific meaning. From observations made during field research in Papua New Guinea, Vanuatu, Solomon Islands, and Fiji, the word is used with little regard to its true meaning. In the Solomons in particular, more products were labeled as "organic" without any pretense to be associated with a certifier than was seen in any other country visited. This is perhaps hardly surprising given that certification is relatively small scale in the Pacific Islands and has generally only been sought when accessing export markets. For local marketing it has not been a requirement that consumers have demanded. .

In discussion with different stakeholders, the word "organic" is used to cover "grown without chemicals", "grown traditionally", and "grown in accordance with organic principles". It is noted that these meanings are only applied to plant and not animal production. The one case where there is an effort to differentiate organic production from other forms of production, that is, animal production in Vanuatu, the term "pharmaceutical free" is clearly identified on the finished product packs.

From field work in the five Pacific countries and territories as well as correspondence with Niue and Tonga, there exists no legislative protection for the word “organic”. However, this appears to be a world-wide issue. The exception is French Polynesia where there is an on-going effort to implement appropriate legislation. The NGO pushing for the reform is soon to be helped by the local Chamber of Agriculture.

It is recommended that the authorities responsible for standards in the various countries be asked to recognize the Pacific Organic Standard as the benchmark Standard for organic production in the Pacific and actively engage as a regional movement to seek equivalency for the Pacific Organic Standard with key trading countries/regions.

It is further recommended that compulsory requirements for mandatory third party certification be avoided and that other mechanisms for organic conformity such as participatory guarantee systems be explored.

It is further recommended that producers, in particular small holders should be supported to comply with standards and certification procedures and that training programs for farmers to establish Internal Control Systems for group certification be supported.

It is further recommended that well trained Organic extension services be provided.

It is further recommended that widespread consumer education program be undertaken so that consumers understand what the contents of labels really mean.

7. **Growing organic produce**

Section 4 has already noted the issue of lack of support to producers of organic products in the Pacific.

It is recommended that a series of pamphlets be written and published that show how to grow specific plants organically.

It is advised that the FACT Project – Facilitating Agricultural Commodity Trade based at the Secretariat of the Pacific Community in Suva – plans to write and publish a series of pamphlets on the production of organic products that fall within its bailiwick. These include pawpaw, selected herbs and spices, essential oil plants, and ginger.

It is further advised that the FACT Project will seek to identify types and sources of supplies of agro-chemicals that comply with organic standards so as to assist the production of organic produce.

9. Costs of production

Organic production is typically associated with two cost parameters.

One is the generally lower yields associated with non-agro chemical assisted production and the other is lower input costs associated with not using agro-chemicals.

The other is the cost of certification. Any cost is acceptable provided that the additional cost is lower compared with the additional revenue too be gained by being able to access the higher paying organic market.

Only minor reference was made to the former issue during the survey but the latter, the high cost of certification, drew near universal comment.

It is recommended that the Regional Organic Task Force (ROTF) undertake a series of comparative cost of production and revenue studies for conventionally grown and organically grown produce. The study should encompass selected herbs and spices, select essential oils, and ginger, root crops, cocoa, coffee, and noni products.

10. Further activities

Two further activities are suggested.

10.1 Organic web page

Organically certified product from the Pacific is a new marketing phenomenon. Thus, little is known about it/them.
FACT proposes to redress this by developing a web page for organically certified herbs and spices under its purview. That is, for select herbs and spices, select essential oils, and ginger.

Development of a website is underway, it will grow as resources for the project are identified. It is recommended that the ROTF continue development of this site for organically certified products in the Pacific. Based on Table 1, this would include:

- noni / noni juice, noni fruit, noni chips, noni leaf powder;
- banana, mango, guava puree, sliced banana pieces;
- fruit and vegetables;
- tamanu oil;
- canarium nuts;
- coffee;
- cocoa;
- honey; and
- coconut products, especially virgin coconut oil. ;

10.2 Organic ingredient marketing

The present survey revealed that most organic producers tend to concentrate on producing the whole product: that is, organic fruit, organic vegetables, organic noni, even organic virgin coconut oil.

Without digressing into an essay on the overall organic market, it is noted that ingredients market tends to be overlooked. The advantage of supplying the organic ingredients market is that the supplier does not have to maintain the expense of identity preservation. This is where the supplier has to provide consumer-size packages, comply with end-use labeling laws, discovery and fund distribution systems, and undertake whole-chain promotional activities. By supplying product as an ingredient to an on-manufacturer (who may be a food or non-food manufacturer), the organic ingredient supplier can consider the vast economies associated with industrial / catering packs. The on-manufacturer has to handle distribution costs and end promotion.

The advantages of supplying an organic product as an ingredient need to be demonstrated economically.

It is recommended that ROTF facilitate the development of the market for an organic ingredient in order to promulgate the advantages of the ingredient market. It is suggested that the product be a spice: it is further suggested that the product be pepper. This product is certified in three countries (Fiji, Vanuatu, Papua New Guinea) thereby making the issue one of product support not of specific enterprise support. By taking one product common to three countries the possibility of promoting it pursuant to a regional product is raised. Finally, it is suggested that the market to be developed is northern Europe / Scandinavia. This is because other studies into spices have shown that these countries tend to pay very high prices for high quality products, especially at Christmas time.[33]

[33] See Vinning 2005, 2004a, 2004b.

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[34] A consumer study undertaken by Ms Gernioux as part of a social geography assignment on sustainable agriculture whilst on a three months attachment to the CPS - Secrétariat général de la Communauté du Pacifique, Division Ressources terrestres, Noumea. Study results initially reported by Ms Judith van Eijnatten, Chargée de la vulgarisation par des méthodes participatives (PTOM) CPS - Secrétariat général de la Communauté du Pacifique, Division Ressources terrestres, Noumea, to the Regional Organic Task Force Meeting, Nadi, Fiji, December 2008.

Survey: Organic produce from the Pacific

1. Concept of survey

The concept of the survey is two-fold:

- Identify the existing supply base of organics in the Pacific.
- Identify the demand side of organics in the Pacific.

For this survey, the Pacific Island countries are identified as

Cook Islands	Fiji	French Polynesia	Kiribati
New Caledonia	Niue	Samoa	Solomon Islands
Tonga	Vanuatu		

2. Supply-side

The supply-side aspects of the organic produce survey has several aspects:

- Identification of certified organic producers, their products, and their certifiers.
- Identification of current production levels.
- Estimates of future production levels.
- Identification of potential constraints and steps needed to address these.

Estimates of future production levels are based on the assumption of maintenance of quality.

Vital to the estimate of supply capability is the notion of cost competitiveness. Thus, the survey must include some statement on the cost of organic production and the relative cost of conventional production for the same product.

3. Demand-side

The focus on the demand – side investigations will be, in the first instance, on local markets.

The investigation will look at the two basic markets for organic products:

3.1 As a whole item.

This refers to the end-use being in the whole form, such as fruit, vegetables, honey, spices and meat. Potential demand for this form of organic product is

- Street markets
- Retailers
- Hotels
- Restaurants

Hotels can be considered of two types:

- ☐ Those whose clientele would not distinguish between organic and conventional products and thus would not pay for the difference.
- ☐ Those whose clientele would distinguish between organic and conventional products and are prepared to pay for the difference.

3.2 As an ingredient.

This is where the certified product is required in order that a larger product can be certified organic. There are two suites of products where organically certified products act as an ingredient:

- Food
- Non-food products, mainly personal health care products.