MARKET OPPORTUNITY SCOPING PROJECT

DISCUSSION DOCUMENT

Regional Organic Cotton Round Table

Burkina Faso

28th September 2018

Foreword

We are delighted to present this discussion document drawing out conclusions from the Market Opportunity Scoping Project carried out by Change Agency for the Textile Exchange Regional Organic Cotton Round Table in Burkina Faso on September 28th, 2018

We would like to extend our thanks to our sponsors Catholic Relief Services who made this project possible. Most of all, we would like to thank our interviewees – it was an honour to speak to you and to share your wisdom.

We trust that what follows will inspire fruitful discussions and action planning.

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Contents

Summary

Project Objective

Textile Exchange has run a number of very successful *Organic Cotton Round Table* (OCRT) events, allied to its Textile Sustainability Conference. Starting six years ago in Hong Kong, the OCRT brings together people from all parts of the value chain from farmers to retailers to discuss how to improve the market penetration and sustainability impact of organic cotton. The OCRT is the key global gathering for pre-competitive collaboration. It has spawned a number of successful initiatives including the *Organic Cotton Accelerator* (OCA) and the *Chetna Coalition*.

Developing a regional focus for global organic cotton

At the OCRT in Hamburg, Germany in October 2016, delegates proposed focussing the work of the OCRT on particular regions of the world, to devise locally-specific programmes that would meet the needs of individual countries. Turkey came forward to support the first Regional Organic Cotton Round Table (R-OCRT) in Izmir in 2017, and the Burkina Faso R-OCRT is the second location for what is intended to become a world-wide series of national and regional initiatives.

Research was needed to frame the topics for discussion at the R-OCRT and to ensure that the wisdom and experience of the African organic cotton sector was embedded in the event from the very start. Change Agency was asked to conduct a Market Opportunity Scoping Project (MOSP) with a range of stakeholders.

Change Agency is a research and consulting business which helps organisations to anticipate, plan and deliver change successfully. Change Agency's clients include a wide range of sustainability NGOs, standards systems and associated bodies.

Our research methodology - an Appreciative Inquiry

The MOSP project is based on Appreciative Inquiry: asking questions of a range of stakeholders to unearth the positives in a situation and identify any blockages to progress. Appreciative Inquiry works on the assumption that whatever you want more of already exists in the situation you are looking at. While traditional problem-solving dissects a system looking for problems, Appreciative Inquiry works to uncover the forces that give life and energy to a system. Traditional inquiry asks "what problems are you having?"; Appreciative Inquiry looks at "what is working well in this situation, and how can we have more of that?"

Interviewers Simon Cooper and Sabali Meschi conducted 15 structured confidential interviews with a broad sample of representatives of all stages of the value chain. These were analysed for common themes and innovative ideas. Quotes from these interviews are placed throughout this report in ***bold italicised text***. The interviewees included brands and retailers, government bodies, manufacturers, and NGOs. This document summarises the ideas that emerged, arranging them in three categories based on which group of stakeholders is best placed to discuss and implement them.

The interviews summarised here are not intended to provide a complete map of the way forward for organic cotton in Africa: rather, they are intended to stimulate discussion and debate at the R-OCRT. If the experience of the Global OCRT and the Turkey R-OCRT is repeated, this will inspire the formation of new collaborations and new initiatives. Together we are undoubtedly stronger, and the R-OCRT will facilitate our coming together into a connected community to maximise the chances of success.

Headline findings

Our findings are intended to be, and are presented as, catalysts for productive discussion. These will be developed during the R-OCRT in Burkina Faso and, it is hoped, will generate a number of work-streams to take the ideas forward. From the many points discussed in the interviews, a number of common themes emerged. These ideas are grouped into three organisational categories based on which part of the community can best progress them:

- What Can Government & NGOs Do?
- What Can The Value Chain Do?
- What Can The Market Do?

Theme 1 – What Can Governments & NGOs Do?

Government is, of course, seen as a key player in organic agriculture. Interviewees felt there could be more collaboration between countries and more focus on organic cotton. Government is a main influencer on plans to bring more value-addition before export and was thought to be the appropriate driver for efforts to professionalize the sector, improve training, and make sure that organic cotton is given the right rewards for its contribution to social and environmental improvements.

Africa is 54 different countries, and cotton is grown in 30 of them. Governments can be very supportive - this is the industry that will create jobs, governments say "we want jobs, what do you want from us?"

Our interviewees mentioned these topics in respect of governments and NGOs:

I. The area has a **strong cultural bond**, which should make collaboration easier. The C4 and Senegal have cultural, historical, and geographic ties and their language brings closeness to Europe:

French speaking, and a long experience of where NGOs have worked in West Africa, that's what binds these countries together.

One of the reasons why we have chosen to work with these countries is the historical proximity with West Africa, which I consider positive, and the fact that we share the same language. Some countries in West Africa and France share history and I consider that it is thanks to this that we understand each other, and it helps building easily partnerships. And, in particular, if we have to commit ourselves, acting in co-development, for the development of organic and fairtrade, I prefer that it be with Africa rather than with India or other countries.

II. Governments can benefit from the fact that we are moving towards a social and solidarity economy (Agenda 2030), in this context, **the socio-economic footprint of African craftsmanship and handcraft SME's, becomes an added value**. Organic and fairtrade are the future:

Especially for people already working with artisans, there's no practical reason not to use organic cotton - it adds so little to the overall cost - you can work directly with the weavers and start with small quantities. The market is there, and it helps so many people - 20% of the population are in cotton fields and if they could be protected by going organic - and make a little more money too - that would be great.

There is a huge awareness of the environmental issues, and that's because people in those countries are at the sharp edge of climate change, and that consciousness is evolving into policy and politics.

We have a really traceable and transparent supply chain in Africa. We also have a young population, often uneducated, who we can train from scratch and give them a skill for life. We employ 60% of our workforce as women who come from villages with no education or skills - and we train them to earn a decent and honest living and build a livelihood for themselves.

Manual work is sustainable because today the economic and social value is appreciated. We are moving towards a social and solidarity-based economy.

On a societal level, 52% of women are in organic cotton, which is an agriculture that helps the poorest of the poorest. It is a very inclusive agriculture. It must mobilise people those who are in the sustainable and solidarity economy.

Manual work may offer lower yields, but it has other advantages, the whole point is to make it more valuable.

We want to combine organic and fairtrade, organic is the future, it's health, the environment. For the food industry in France, it is increasing all the time, even if it's more expensive. It answers market needs.

III. Based on the strong bond, there is still room to **improve regional dialogue and collaboration:**

Connectivity within the organic cotton chain between Burkina Faso, Benin, Mali, etc. must be improved to facilitate the market. There is a need for coordination.

The demand is there but you need to provoke it, to look for it in fairs and elsewhere. Moreover, there should be a certain level of organisation at regional level, which is somewhat lacking for organic cotton. That is the reason the SICOT is taking place. A lot of work has been done to establish the presence of organic cotton by raising awareness of all that can be gained from this product.

At the regional level, we want people to come together to collaborate!

IV. In particular, governments should **Improve north/south dialogue:**

We bring the volumes to them, but everyone must invest and that's what was good about ten years ago. We were a narrow north-south chain regulated by contracts.

The partnership between North and South must be taken into account. In this partnership more communication is needed. Somehow the parties blame each other because there is a lack of communication. We should know what role the North plays and what role the South plays and how the two parties come together to agree on a minimum. Otherwise everyone fights for his side.

V. **Organic cotton should become a priority for African governments.** At the moment the focus is too often on conventional cotton. The risk is that other crops (not even cotton) are favored by farmers if the price is right:

The willingness of governments has increased, but also the pressure on cotton has increased. Cotton all over world is getting problems in competing with other crops as farmers decide what to plant. Agronomic performance and accessibility to market are key in farmers' decisions of what to plant.

We need more people to invest in it and make it work, but not only in the North, in the South as well, because it is more in Africa that we have problems, while we (in Europe) have markets waiting for it. We are convinced by it (organic fairtrade cotton) and we will continue to offer it but everyone has to follow through.

It should be ensured that national cotton organizations make organic cotton a priority and that organic cotton thus becomes a locomotive for wealth creation. Because the problem with organic cotton is that not many people in Africa support it.

National cotton organizations do not pay much attention to organic farming because volumes are not large enough for them, whereas in Europe it is constantly improving, and it is a double-digit increase every year. Society asks for organic, even if it's more complicated...

VI. Governments should provide a **range of support** to cotton initiatives:

The government brings support, subsidized electricity, trainers for local staff, knowledge transfer and the facilities to remove blockages which prevent us from achieving our goals.

VII. Governments should **develop their local textile industry to create jobs through added value and price stability:**

Africa exports 85% of its cotton in raw form, and if you value-add that then you can create a value just at the wholesale level of 15 times the value of the raw cotton, you could create 9 million jobs. The benefits of it, if you can get it right, are huge.

In Burkina Faso they decided to build a gin only for organic cotton, that is good.

I think there's a huge potential market for organic workwear and organic uniforms as a unique opportunity that West Africa could produce, if we could convert the organic cotton that's there into fabric.

I don't think governments have realized the benefits that creating value addition, creating employment in their regions will bring because the focus has been so much on creating primary commodity products.

The average age in Europe is 40. The average age in Sub Saharan Africa is 18. So tomorrow's consumers, tomorrow's engine of growth, they're going to be within Africa so businesses and governments need to focus on that to make sure there is enough employment and enough development to build the really dynamic society that they can.

The development of weaving and cotton processing at local level creates jobs and allows people to stay in their local environment. It gives everyone a job: the women who weave, cotton producers... In addition, there is no competition, the demand is a stable because, what is good in this field is that Chinese products and second-hand clothing cannot compete with us: they are based on large volumes, we on quality and style.

It is true that if the textile industry were stronger in these countries, a cotton sector would be implemented there. As long as there is no textile production, I am talking about spinning, weaving and even tailoring, it does not stimulate the development of a local cotton production.

Indian cotton is used directly on site by companies such as Decathlon (French sport retailer) and this has an impact on the price.

VIII. There is a need to **Improve organic cotton marketing:**

We had hoped the African Cotton Partnership – EU could help with this.

IX. **Governments should increase their support for organic cotton promotion** by organizing specific events for organic cotton, supporting local company participation in international exhibitions, and improving communication on GMO free benefits:

There is a lack of diligent promotion, which means that the advantages of Burkinabe cotton regarding prices and market balance cannot be put forward. The challenge of African cotton is precisely to better position its intrinsic qualities.

If we could have more sustained promotional programs, we would be able to get out of the niche spirit and move into larger markets. There is potential!

For conventional cotton, regular meetings are organised at regional level, while for organic cotton there is no agenda with scheduled meetings to discuss current issues. The spaces organized for conventional cotton do not leave enough space for organic cotton.

What bothers us a little in Burkina Faso is GMOs. Burkina Faso is the only African country to have accepted GMOs.

In Burkina Faso, there has been no GMO cotton for three agricultural seasons, i.e. for two years.

X. **NGOs have supported African organic cotton for many years.** Now is the time for these grant aid projects to trigger sustainable financial plans:

We had established good collaboration between Europe and West Africa, but there was the problem of subsidies because producers had to take care of themselves.

At the supply chain level too, good governance and management are needed. Because when we make the overall assessment we find that the sector is in loss.

It's because of the funded programs that it [the organic cotton sector] is still here.

XI. Government & NGOs should **facilitate access to funds** to invest in the organic cotton sector:

The major problem is that here it doesn't work like in Europe, there is no supplier credit in Africa. You have to use your own resources, but it is difficult to develop only with them on a large scale.

The customers are there but now we have to get organized to reach this clientele and it requires a lot of resources because fairs are expensive, it demands a good communication and support.

XII. Governments & NGOs should **support training and professionalization** of the sector:

What needs to be changed is producer mindsets. We produce to make profit. It is necessary to make an assessment and a plan.

We need to move to another scale but there is not enough support. They have the know-how, but we have to teach entrepreneurial culture, train business leaders.

My wish and dream is better support. We cannot develop further without support.

Conclusion - Governments and NGOs

Governments are at the centre of organic cotton aspirations in the region. They are key players in the value chain, making the market by buying cotton and organising exports. Sometimes there is an imbalance in support for conventional and organic cotton and more resources could be devoted to improving the position of organic. However, governments are responsible for their country's achievement of the Sustainable Development Goals and the environmental and social benefits of organic cotton will provide a continuing encouragement for government support.

In the discussion at the R-OCRT in Burkina Faso, these suggestions will be filtered and prioritized to produce a work plan for action.

Theme 2 – What Can The Value Chain Do?

By the value chain, we include all stakeholders from farmers through to manufacturers. Africa has a long history in cotton, sometimes farmers have farmed the same land for over 20 years. This is a strength because of all the indigenous knowledge that has accumulated, but can be a threat if long-established approaches prove inflexible and resistant to change.

Value chain topics covered in our interviews included:

I. **The quality of the organic cotton** from West Africa and Burkina Faso in general **is good and appreciated.** For some companies, Africa is their 1st Choice because of the quality of the cotton fiber:

For us Africa is the new frontier of manufacturing, there are huge benefits in terms of it being close to the US and EU from a shipping point of view, with favourable trade agreements, a plentiful supply of labour but also, for us specifically in West Africa a really good approach to worker empowerment and to developing an industry that puts people in the same place as profits.

I think a huge benefit of using organic cotton from Africa is that it's completely transparent - we know exactly which farm it has come from, we have very good relationships with the farming groups, and a lot of African countries have banned GM seed.

The first strength of Burkina Faso's cotton is the intrinsic quality of the fibre (length, strength). In addition, it should be noted that in Burkina Faso some of the most nature-friendly organic cottons is produced because all the work is done by hand (we do not use tractors) so the carbon footprint is very small. We also harvest by hand and this preserves the quality of the product.

Organic cotton has a tremendous added value: it preserves the environment, the quality of the fibre is good for the production of ready-to-wear fabric and it is also a fibre that adapts well to dyeing.

We decided to work with Africa first of all on a qualitative and technical choice. We have selected the origins of cotton that allowed us to meet our quality requirements and African cotton corresponds to the quality of raw material we need: it has good mechanical resistance. Moreover, the fact that it is organic is interesting because it is in line with our CSR philosophy: the carbon footprint is good, no pesticides, no irrigation.

The quality of African organic cotton is good (colour, impurity, fibre length etc.) and appreciated, but the level is to be compared with Indian or Turkish cotton.

II. **Natural resources are available**: climatic conditions are favorable to the development of the organic cotton:

It is rainfed, which leads to dangers from later rains and more heavy rains, but West African farmers seem able to handle this and he length of the growing season, which has got shorter.

One of the reasons we chose West African cotton is because it is rainfed cotton, so there is no negative impact from a water point of view and for us it is very important because our company is very oriented to Social and Environmental Responsibility (SER).

There is still a huge investment opportunity. It is possible to develop an economic activity in these countries. The resources necessary to do so are here: in any case, production, producers and natural resources.

Considering climate change, cotton production in West Africa still makes sense, even though, they might have to cope with season length changes.

III. **Human resources are available.** Producers have experience and skills in organic cotton production:

We have the creativity and the skills in Africa. We need to make sure that the kinds of expectations we have of employers in the West, that system is developed and maintained in African countries too.

Burkina's experience with organic cotton has already started since 2004. The players have acquired expertise in the field of production but especially in the marketing of fibre.

They really have the experience. We know that they can produce, they can grow, that it could be scale up quite easily because the know how is now available. Specially pesticides, they can handle well.

All producers know well how to sow and master the use of seeds (the right amount); they also master the use of organic manure.

IV. **Improve good practices in post harvest** and stock processes to preserve the quality of the cotton fiber:

Relations with Africa in terms of supply in recent years have been tough and the quality was not very good. Two years ago, we had major quality problems with Burkinabe cotton, also because it was very, very polluted due to poor storage.

V. **Adapt logistics to international market requests.** Logistics related to the conventional cotton sector work well, the organic cotton sector needs to reach the same level of efficiency:

One of the weaknesses of the cotton sector in Burkina Faso is that they are not reliable in terms of logistics, it is very, very, slow. From Bobo to Abidjan it can take two months. They are not aware of the urgency, yet the world is moving much faster than they are. That is the problem of some countries. And there is no difficulty with crossing a border in Africa. It is not a problem for the conventional. That's a false excuse. It's because they're poorly organized internally, there are blockages. At the UNPCB everything is slow, you have to push them all the time. They would do better to sell through SOFITEX.

It is also slow with organic cotton because of the ginning process.

The speed of delivery logistics is not the priority of the national cotton organizations in Mali or Burkina Faso. Thus, conventional cotton is first prioritized, the ginning of organic and fairtrade cotton is done at the very end.

VI. The value chain needs to be **flexible enough to easily adapt to market change** and requirements, especially the need to adapt to new standards & certifications required by international markets:

Instead of growing cotton in Africa, spinning and weaving it in Bangladesh, finishing it in Hong Kong and making the garment in China, we're doing everything in one place.

When we work in other regions we find clusters – we know where all our raw materials, trims and so on are coming from in a cluster of companies. In Africa it's more like islands – one company doing one thing and they don't really look outward. I would love to see clustering happen so that the whole industry develops and grows.

Today, ginners and local governments have not understood that the textile industry, which is the one demanding fibre, requires certification to be done either on Global Organic Textile Standard (GOTS) or Organic Cotton Standard (OCS).

Local governments have not realized that in order to find market opportunities for cotton it is not enough to certify cotton according to regulations (at the production level), cotton must also be certified at the ginning level either under GOTS or OCF. It is very difficult to make operators, local ginners, understand that if they are not certified, according to one of these standards (GOTS or OCS), it will be impossible for them to commercialise their cotton. There is a big concern from this point of view.

Only Burkina Faso has been certified GOTS with UNPCB in the region. Today, ginning operators who have not made the effort to switch to either GOTS or OCS certification block themselves access to their main market, which is the textile market.

Currently ginners have no choice, they must have an organic production certification for the seeds and in addition a GOTS or OCS certification if they want to sell the organic fibre for use in the textile sector.

GOTS is a private repository that imposes social criteria. It is involved at all stages of the cotton supply chain, starting with ginning. GOTS is in addition to organic production certification. GOTS values the supply chain much more than does the organic production certification.

In Benin, we talk to them about this GOTS certification, but it didn't change. While in Burkina Faso they have certified themselves, they have understood that this will greatly facilitate the marketing of their cotton. In East Africa, our suppliers were already GOTS certified, so it was not necessary to convince them.

VII. The value **chain is well structured** and there is a good dynamic along the chain:

One of the good practices that other regions should take as an example in Burkina Faso is the producer organisation and the interbranch system that has been set up.

The sector in Burkina Faso seems to me to be more integrated and the actors have more trust towards each others and exchange more together. There is a coordination, managed by a permanent secretariat that regulates all the interests of the sector. Today, producers are talking to stylists and the value chain is becoming more and more operational.

A round table was recently organized to bring all the actors together. This is the most important change, the dynamic at the level of the entire value chain.

Today, producer organisations are considered by institutional structures.

VIII. **There is a need to increase the volumes** of the organic cotton production, for price impact, to supply increasing local, regional and international demand, and to spread the certification cost impact:

Today we really need large quantities of organic cotton, so I think it is necessary to increase production and we wish to have investors willing to make the bet, and to engage in production in West Africa.

Every year we have to struggle to get the volumes we need. While we advocate the development of this sector (organic/fairtrade) on our markets, in our sectors, with our customers and with the customers of our customers, we often have difficulties for supply. We had to buy cotton in Kyrgyzstan when we really wanted Africa.

The demand is there. But we have to get organized, to produce more. The creators all want to invest in that [organic cotton] but they are reluctant because they are afraid not to find the raw material.

We should be able to produce more, as today the level of production is extremely low. And inevitably, if we are at a low level of production, we will be at a higher price level because we cannot be productive and efficient enough. In India, we produced tens of thousands of tonnes of cotton. In Africa, it is not the same level at all, so the problem of volume is here and plays on price competitiveness.

IX. **The value chain needs to be financially sustainable**, Producers and UNPBC need to develop autonomy, and cannot always rely on funding programs and subsidies:

We have convinced small farmers - 0.5 to 1.5 hectares - of the benefits. There are so may positive impacts, not getting into debt, percentage of women involved is very high, for them it is good income they can generate in combination with fairtrade prices

The sector must be self-sufficient! Otherwise the organic cotton sector will disappear. The UNPCB must be able to work independently.

Cotton has to be sold at a price that takes into account the costs, because currently the (organic cotton) program is operating with losses. What helps the program are the funding programmes. Moreover, when a project starts, the

question of sustainability itself is critical (we know when projects start but we don't know when they end).

X. The various actors at the different level of the value chain need to develop an **entrepreneurial approach**:

We must bring the farmers to the market and the market to the farmers - how can we, together, create an improvement in the whole fashion industry?

We must pass on the know-how, even if it is not large industry, we must** adapt **the same methods to small businesses.

XI. Development **of commercialization skills and potential is needed**. This would improve client management; diversification of customers and strengthen stable market relationships:

In Burkina Faso, producers are very inexperienced in marketing; they lack training. They are, above all, producers and therefore not very familiar with market conditions. They must work with reliable people who do not abuse their credulity. When we talk about CMDT in Mali or SODEFITEX in Senegal, these are experienced people who can handle the issue of marketing, FOB delivery, etc.

They don't have the notion of money, cash flow... so for them it doesn't change anything, it's a little bit as craft.

There should be the same operationalisation, the same efficiency as in conventional cotton.

We should be able to lower certification costs and improve the marketing system: improve relations with markets, anticipate sales, make contracts with customers...

Conclusion - The Value Chain

The African value chain has a range of advantages but the amount of value addition within the continent could be greatly increased, capturing value for the home producing countries rather than exporting that opportunity overseas. One blockage in this process is the ambition of some countries to host the entire value chain within their borders. Sharing production facilities across borders would spread the costs of investment between countries and allow a faster development of infrastructure.

Theme 3 - What Can The Market Do?

When speaking about "The Market" we include brands and retailers, who through their demand for finished goods, are the main market for organic cotton, determining demand and price levels. Suggestions for actions that the market could lead included:

I. **The demand exists** and the organic cotton made in Africa is appreciated from retailers, textile industry and brands. Some retailers & brands support and advocate organic and fairtrade cotton from Africa because there is a specific demand for it. Organic cotton production has been steady in recent years:

There's a vast number of people across the continent - so if we think about Africa with its 50+ countries, there's an international market within the continent, to me it's a rich, rich potential.

We have an Acacia tree, farmers sit under it and they meet the buyers who are coming for the product. To include the farmers in the whole system, it's an important dialogue and it's one we must keep alive.

There's a lot more interest in the continent than ever before, there seems to be more investment coming in, certainly I haven't seen this much interest before in African made garments.

The demand is there in terms of textiles. In this field, over the past 4-5 years, there has been a double-digit increase of certified operators. So there is a strong development in Europe, but also in production countries. Unfortunately, Africa is a little forgotten. But what is certain is that there is a demand for it. For West Africa specifically, the major problem is to be able to enter the market. How to manage having a production at market price level.

The organic products we develop are intended for a certain clientele. And this clientele is there, it is an asset.

Fairtrade cotton has lost on the market but organic cotton on the contrary is gaining market share. Fairtrade suffered from the BCI competition, because the BCI is cheaper (no premiums). Burkina cotton is organic and at the same time fairtrade cotton. So we really need to restore the value of fairtrade cotton.

II. At the moment, **the market of the organic cotton is more stable** and doesn't suffer price volatility. Lower investments are needed to start organic production compared to the conventional route **and revenues are higher**.

Knowhow and seed are available and has built up over the years, input costs are lower and yields are increasing as experience in natural pesticides and fertilisers improves, and farmers work with nomads and their animals to produce natural fertilisers.

Specific types of cotton - organic etc - are processed in small quantity. We don't buy in advance in order to sell gradually. Thus, financial speculation cannot be found in organic cotton, apart from some exceptions.

Mayala is a new area producing organic cotton (since 2013) where producers are mainly women. Organic cotton sells well, the income is consistent and there are not too many charges: this is what raised women producers' enthousiasm.

III. Geographic proximity with European market is an asset:

If the price were there, the demand would be there. There are a lot of people who are sensitive to Cotton Made in Africa. It has its impact. At the consumer level, they are sensitive, at least in Europe.

IV. Geographical collaboration between countries should be matched by collaboration along the supply chain:

We want to specialize our mill in biocotton, it needs raw cotton from Burkina Faso, Mali and Cote D'Ivoire. Africa needs a strategy together not separately, countries should work together to share facilities, but political issues cause separate working.

Conclusion - Markets

African organic cotton is clearly in demand from Markets and brands, but an effective demand alliance which gives reliable demand signals to enable farmers to plan their planting would improve the situation. Producers and brands still occupy separate worlds but modern integrated supply chains can bring them together. One example is the Chetna Coalition in India, which a number of interviewees cited as a useful approach for Africa to consider.

As well as these collaborative proposals, it is clear that there are also initiatives which individual organisations can progress on their own, and examples of these are also given in Individual Progress below.

Broader impacts will require collaborative skills and organisations working together in common cause. Collaboration will run more smoothly if it is facilitated and supported, and Textile Exchange is proposed to deliver this.

Individual progress

It can be too easy to wait for wide-ranging issues such as those in African organic cotton to be solved by others – the feeling that something is too complex to address alone can lead to inaction by all concerned. It was clear from our interviews that there are some decisions that individual organisations can take without reference to anyone else, which would greatly improve the situation. Some examples are:

Timely Payment – each stage of the value chain often finds itself having to borrow while it waits for payment from its customer. The end consumer pays for the interest on these loans. If prompt payment is taken up as a principle by each player, the interest is saved.

Demand Forecasting – Farmers' planting decisions are taken up to 18 months before the finished garment is on the rail, so it can seem impractical for retailers to signal their demand so far beforehand. However, in a settled value chain the retailer can indicate trends in demand to its suppliers so that farmers can take account of this.

Stable Product Lines – Every business has its reliable lines – the products that sell consistently year in, year out. Using organic cotton for these products – instead of new ranges with uncertain sales – makes it much more possible to provide demand forecasts.

These are just three examples of individual decisions that could be taken now to improve the situation. There are many others, specific to each stage of the value chain, which should be considered as 'quick wins' for all

Conclusions

Our overall conclusion from these interviews is that Burkina Faso and the broader region has an excellent opportunity to grow its organic cotton sector, given more collaboration and a concerted effort to bring more value-adding into the continent rather than exporting raw cotton. As one interviewee put it:

Textiles has industrialised the world, the time for Africa is now!

The foundation for this optimism is a series of key advantages identified by our interviewees:

Advantage 1: Size

Burkina Faso is second only to Tanzania as a producer of organic cotton in Africa. This gives the country the opportunity to act as a hub for regional development, providing the raw material for the development of cotton ginning, mills and other facilities.

Collaboration across borders should mean that governments do not attempt to build all the value chain elements in their one country, but share with neighbours the responsibility to develop an integrated value chain between them.

I. Size matters:

Burkina Faso is the second largest producer of organic cotton in Africa after Tanzania. And this is likely to be consolidated with the establishment of the first ginning plant dedicated to organic cotton in West Africa.

II. **Local production of organic certified non-GMO seeds** brings the potential to become a seed provider at regional level:

UNPCB now multiplies organic seeds and then distributes them to organic seed producers. It is a system that is unique in West Africa at the moment. This, moreover, should eventually enable UNPCB to position itself as a certified organic seed supplier in the sub-region.

III. Development of the textile profession through the creation of textile schools and professional vocation and training centers.

We have set up a Processing Center, it is a pilot project to train people in the clothing industry.

Advantage 2: Local, regional & international demand

Burkina Faso benefits from three sources of demand for its organic cotton – international demand from global brands, regional demand from neighbours, and local demand from Burkina Faso citizens. Many people in Burkina Faso only wear 100% African apparel and new generations, and those in the diaspora, have a renewed interest in African fabrics.

The national pride is amazing - locally produced fabrics are highly demanded, people speak with pride about the quality produced in their own country.

Advantage 3: Quality of Cotton

Many interviewees complimented the quality of cotton from the region, indeed one recommended taking organic cotton out of the commodity market by giving it an origin certification like champagne.

More work may be needed in the post-harvest phase to improve the quality but the historic criticism of African cotton quality is no longer true.

Advantage 4: Environmental and Social Strengths

As consumers and brands become increasingly aware of environmental and social aspects, Africa's rainfed cotton is recognised as offering a range of advantages over its irrigated counterpart. On the social dimension, Africa organic cotton is an inclusive approach which favours women farmers:

> *Yields can be extremely high under the right conditions, women are well-suited to organic cotton growing, and cotton fits well into the crop rotation.*

If you could change one thing…

At the conclusion of each of our interviews, we asked our guests to imagine that they had been given a magic wand and could have one wish to make things better in organic cotton in Africa. This produced a range of blue-sky ideas:

I would change people's hearts, develop the spirit of sharing and fight hatred. People are against change so we must persevere and set an example.

Organic cotton should become a priority for local companies so that organic cotton becomes a locomotive for creating wealth. The problem of organic cotton is that there are not many people who support it in Africa. African companies do not give much interest to the organic cotton because they don't make large volumes whereas in Europe it does not cease to progress.

I would improve producer's education level. Education is the main factor in being competitive and increasing productivity and hence income. Most of the producers are illiterate, they speak a little French but they are not able to interpret technical sheets.

At the scale of the region, people would collaborate together.

What needs to be changed is the mindset of the producers. They should produce looking at profit. They should be able do an economic balance of their activity and an activity planning. At value chain level, good governance and good management are also needed. Because when you make the general assessment you will find that the sector is in loss.

Prices would lower and production would increase!

I would invest a lot of money in the country to create a textile industry there.

I would make sure to secure the market in order to secure producers! I wish I could say, "the demand is here" and manage to convince people that this demand is real. Because some people say that the demand is there, but those who are in the village do not know as well that the demand is there. It is the connection that is missing. How to convince producers that the demand is there?

I would wish for access to quality yarn, with a spinning mill.

Take cotton out of the commodity market and introduce an origin definition and Fairtrade Organic criteria.

Creating reliable demand would encourage SDG 12 (Sustainable Production and Consumption), but political will is required to create an enabling environment for going organic.

That people should recognise that the aid one gives has multiple benefits, and look to the economic benefits rather than only taking an NGO view.

Africa needs a strategy together not separately. Countries should work together to share facilities, political issues cause separate working and textiles should be higher in government thinking.

I would appeal to Impact Investors to form a West African Sustainable Textile Fund.

I would wish governments to say we will set really high standards for the companies that come here and at the same we will really develop the manufacturing capability and capacity on the continent and we will work together to do so.

My one wish would be for an end-to-end supply chain that converts the organic cotton that's there into fabric.

If I had a had a magic wand I would make sure that governments worked more closely together, to help build industry and have industry-focussed policies. There is a huge potential within Africa to be this vibrant set of economies that it can be.

Next steps

As one might expect from such a wide-ranging set of interviewees, the ideas presented here are many and varied, from major strategic programmes to individual interventions.

It will be for the R-OCRT workshop participants to decide on priorities from these headline findings and next steps in their discussions. Certainly, greater collaboration will be critical to success.

We trust this research will provide a useful indication of the routes to follow.