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Policy Brief

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Supporting the Development of the Organic Sector, Domestic and Export Markets in and from Central Asia

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Key message

The organic sector in Central Asia is growing, supported by evolving legal frameworks and national strategies. To fully harness its potential for rural economies and livelihoods, it is vital to strengthen organic guarantee systems, promote group certification (ICS and PGS), and implement digital integrity platforms. These steps build trust, ensure traceability, and improve market access. Experiences from Kazakhstan, Kyrgyzstan, and Mongolia offer valuable lessons for a regional approach.

What is the issue?

Central Asia increasingly recognizes the importance of the organic sector. However, the number of certified producers, processors, and traders remains small. While individuals and NGOs have long been involved, the public sector's recent engagement has primarily focused on developing national regulations and organic guarantee systems. Other crucial development activities have largely been overlooked.

Research approach

The brief is based on multiple interactions with public and private organizations in Central Asia, combined with Organic Services' extensive experience in the region. Participation in the "Regional Forum" and "Bio-Expo - Central Asia 2024" in Bishkek facilitated discussions among Central Asian countries and Mongolia, advocating for the systematic promotion of organic and regenerative agriculture, the preservation of biological diversity of mountain regions and the sustainable development of the agricultural sector of Central Asian countries. This led to the decision to create a Regional Alliance for practical interaction and harmonization of organic farming legislation.

Key findings

- Kazakhstan: Has shown consistent growth since the early 2000s, significantly boosted by the 2015 Organic Production Law, which is currently being revised. Production is largely export-oriented, focusing on the EU market and adhering strictly to their regulations, with inspections by foreign certification bodies. The domestic market is still developing.
- Kyrgyzstan: Enacted an updated organic production law in 2022, aligning with international standards and covering various aspects of the industry, including transportation, storage, marketing, packaging, and labelling. The law includes a Participatory Guarantee System (PGS) as an alternative quality assurance mechanism. A national program for fostering organic production until 2027 and a roadmap for the "Five Years of Action for the Development of Mountain Regions" (2023-2027) are being finalized.
- Mongolia: Implemented an Organic Food Law in 2016, which is under review for broader scope. Both PGS and third-party certification (including ICS) are used, and an online Organic

Food Registry and Database are maintained. Mongolia has the most developed Organic Guarantee System in Central Asia. The country aims for a 5% organic share of agricultural products by 2030, assesses equivalency with Chinese regulations, and has successfully exported organic products to Germany and the USA.

Policy recommendations

Building on recent progress and regional experiences, the following policy measures are recommended to support the development of the organic sector and its markets in Central Asia:

- **Recognition and Promotion of Group Certification (ICS and PGS):** Integrate group certification as a valid approach in national organic legislation.
- **Provision of Information and Training:** Develop programs to inform and train small producers, cooperatives, and relevant organizations on group certification and digital ICS management tools.
- **Promote the Use of Digital Technologies:** Support the introduction and use of software for ICS management (e.g., Group Integrity) and strengthen traceability (e.g., Check Organic-GIS) through measures like co-financing or facilitating access.
- **Facilitate Data Flow:** Examine possibilities for integrating or exchanging data between digital ICS, national databases (e.g., GIS), and supply chain management solutions, and clarify the legal categorization of agricultural data.
- **Establish a Clear Legal Framework:** Establish and implement organic regulations based on existing laws and ongoing revisions, considering mandatory mass balance systems and national integrity platforms (e.g., Check Organic-GIS).
- **Include Organic Certification in Digitization Strategies:** Explicitly incorporate concerns of organic certification in digitization strategies.
- **Improve Yield Data Collection:** Implement systematic procedures for collecting organic yield data, integrating it into national surveys or using geo-referenced data from mass balance systems and remote sensing.
- **Support Market Access:** Implement measures to help organic-certified groups and companies access national and international markets, including trade promotion and participation in international fairs. Consider following targeted market standards. Keep the system open to local and international certifiers and international accreditation services. Accept imports based on equivalence and from countries with regulatory systems.
- **Establish Stakeholder Involvement:** Ensure full participation of the organic sector by establishing a national association and/or a permanent working group of stakeholders.
- **Develop Simple Instructions and Invest in Education:** Create simple guidelines ("does and don'ts") and invest in education and training for farmers to improve compliance and reduce misunderstandings.
- **Develop an Organic Action Plan:** Create and implement an action plan that considers all development aspects, including research, production, marketing, training, and consumer awareness, drawing inspiration from existing national programs.
- **Design Systems for Domestic Markets:** Design systems to foster domestic market growth, particularly in urban centers. Facilitate access to certification services by supporting local providers and relying on international certifiers, preferring equivalence over compliance.

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