Assessment of the Willingness to Pay for Organic Products amongst Households in Morogoro Municipal

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ABSTRACT

This paper presents the consumers' willingness to pay a price premium for organic products amongst households in Morogoro municipal. The researchers surveyed 100 households using semi-structured questionnaires to examine their perception about organic products and assess their willingness to pay for such products. The study revealed that 78% of the respondents are willing to pay price premium. Results also indicated that the main reasons for purchasing organic products are environmental and health benefits. Findings provide more evidence on consumers underlying purchase motivations and the need to establish appropriate market strategies to develop the future demand. Furthermore, the survey also suggested that the consumption of organic products is increasing; however, product development and innovations in certification, processing, labeling and packaging are needed to further stimulate demand.

DECLARATION

We hereby declare that this research is our own original work done for Sustainable Agriculture Tanzania (SAT) and it has neither been submitted nor being concurrently submitted to any other organisation.

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CHAPTER ONE

1.0 Introduction

Organic products can be identified as products that come from organic production processes or from organic farming. The United States Department of Agriculture defines organic production as a farming system which avoids or largely excludes the use of synthetically compounded fertilizers, pesticides, growth regulators and livestock feed additives to the maximum extent feasible or farming systems that rely on crop rotation, residues, animal manure, legumes, green manure, off-farm organic wastes, and the aspects of biological pest control measures, soil productivity and tilt, to supply plant nutrients and to control insects, weeds and other pests (Alvares *et al*., 1999).

The International Federation of Organic Agriculture Movements (IFOAM) defines Organic agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects. Organic agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved (IFOAM, 2008).

Organic history in Tanzania goes back to September 1988 when the first organic garden was founded at Peramiho in Southern Tanzania. Since it was started, the garden had been fertilized by stable manure, compost, wood ash and latterly green manure, thereby creating a foundation for permanent soil fertility (Bertram, 1997).

Organic agriculture is one of the most promising options in meeting the challenge of alleviating poverty, increasing incomes and enhancing trade, while at the same time protecting the environment. Organic agriculture is a sustainable and environmentally friendly production system that offers developing countries a wide range of economic, environmental, social and cultural benefits. It is a promising trade and sustainable development opportunity and a powerful tool for achieving the Millennium Development Goals (MDGs), particularly those related to poverty reduction and the environment.

Given today's extensive use of pesticides, it is almost impossible for anyone to avoid daily exposure to low levels of several different pesticide residues. There are possible adverse effects on human health arising from continuous long-term, low-level pesticide exposure or chronic exposure. Since consumption of organic products is the best remedy to prevent the numerous health hazards caused by conventionally produced products, the global market has experienced exceptionally high growth in organic products. Demand for organic food products in the United States, Europe, and in other countries is growing rapidly, yet market shares remain quite small (Piyasiri and Ariyawardana. 2002)

However, in Morogoro the market for organic products is not well developed, thus there are only insufficient market statistics available. The market is characterized by lack of proper retail venues, lack of continuous supply, lack of certification, poor quality products etc. Furthermore, none of the marketers has adopted successful marketing strategies for the sustenance of the organic market in Morogoro though there is a growing trend among urban consumers to try organic products from places where they could get an assurance about the quality of the products, as they do not get any chance to consume pesticide free food products.

1.1 Problem Statement

Current consumption patterns of organic products in Tanzania especially in Morogoro Municipal are unsustainable, it is becoming apparent that efficiency gains and technological advances alone will not be sufficient to bring organic products consumption to a sustainable level, but also consumer's willingness to pay for organic products creates another challenge for sustaining organic consumption since prices of these organic products are generally higher than those of the conventional products. The price for organic products could be up to twice of that of conventional products. Hence, price hinders the low-income earners from buying organic products and there are always complaints from customers about too high prices.

The outbreak of "food scares", such as salmonella, together with the emergence of public awareness of the risks of food processing have raised concerns over food safety and production methods. In response to this strong growth, organic food production is increasing on all continents, with much of the increase occurring in third world countries, where farmers are attracted by the higher prices for organic food products. For the same reason, many governments and stakeholders encourage farmers to convert to organic farming through innovation, marketing and communication, and by working in partnership with consumers to define and achieve more sustainable lifestyles (EPOPA, 2004)

1.2 Objectives

1.2.1 General Objective

The general objective of this study was to assess the willingness to consume organic products amongst households in Morogoro Municipal.

1.2.2 Specific Objectives

- To identify the consumer awareness and past experiences regarding organic products,
- To identify the expectations of consumers if organic products are introduced to the market in Morogoro, and
- To identify the factors that influences the additional willingness to pay for selected organic products.

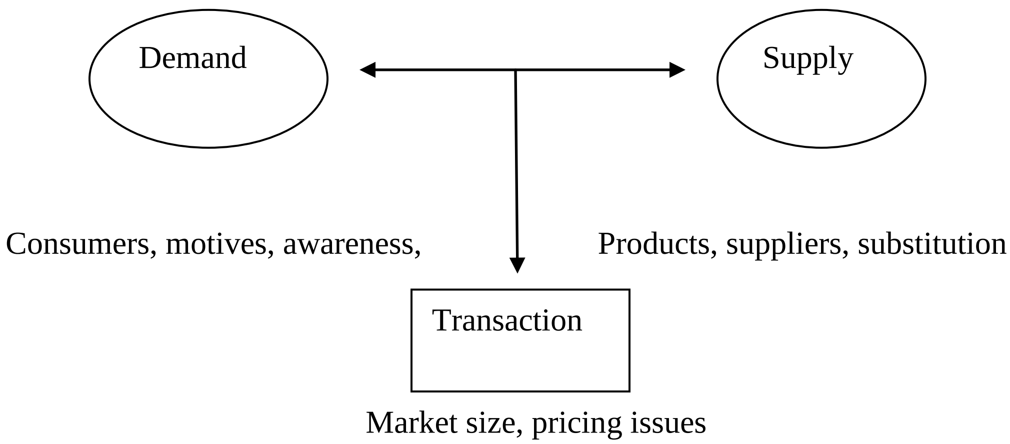
1.3 Research questions

- Are the consumers aware of organic products and do they have experience of organic products?
- What do consumers expect from organic products if they are introduced into the market in Morogoro?
- What factors will influence consumers to pay for organic products?

1.4 Scope of the study

The study concentrated on the three areas of demand, supply and transaction aspects of organic products in Morogoro municipal as shown in the figure below;

Figure 1: Scope of the study



In analyzing these three sides of the market the key drivers of marketing, namely the product, the price, the market place, its promotion and the people (consumers) are also taken into account.

CHAPTER TWO

2.0 LITERATURE REVIEW

2.1 Background

The aim of this section is to review some literatures on previous consumer research, to gain some understanding of the differences and similarities which exist between households with respect to willingness to pay for organic products and to identify key issues from recent literature. A further objective is to assess what is already known about consumer attitudes and concerns in order to highlight deficiencies in the level of knowledge, in terms of the quality and safety characteristics of organic products and related parameters affecting buying behavior.

2.2 Global market for organic products

The global organic products industry continues to go from strength to strength, with organic monitor estimating organic foods and drinks sales reaching 46 billion US$ in 2007, the market has tripled in value over eight years; global sales where about 15 billion US$ in 1999 (AmarjitSahota, 2007).

Global production and consumption of organic products is increasing mostly in Latin America also in Asia where most productions are for export. Large amount of fruits, vegetables, herbs, spices, seafood and meat products are exported to northern hemisphere countries and also internal markets are developing especially in the major cities like Santiago and Sao Paulo. With demand outpacing supply, a number of regions are experiencing supply shortages. Undersupply is most evident in the North American region where empty retailer shelves have become the norm for some product categories. Several European countries are also experiencing supply shortages because consumers demand more organic foods than what is supplied. The organic meat and dairy sectors are the most adversely affected with imports coming into both regions from Latin America and Australasia (organic monitor, 2001).

Fresh produce is the leading organic product category, comprising a third of global revenues. Fruit and vegetables like apples, oranges, carrots and potatoes are typical entry points for consumers buying organic products. Their fresh nature appeals to consumers seeking healthy and nutritious foods. Dairy products and beverages are the next most important organic product categories.

2.3 Market for Organic Products in Africa

The African market for organic products is still small. The general lack of large domestic organic markets in Africa appears to make commercial organic agriculture a high risk, as it strongly relies on export markets. Certified organic products are currently recognized in only a few domestic markets, including Egypt, South Africa, Uganda, Kenya, Ghana, Zambia, Senegal and Tanzania. There are factors which expand the domestic market in these countries, including a growing middle class most notably in Egypt and South Africa that shares similar values with European organic consumers. As a result, there are growing domestic market opportunities for organic products in these countries including organic fresh fruits and vegetables; dairy products; meat; wine and personal care products. In Egypt, mainly in Cairo, specialized shops and a number of supermarket chains have organic sections, selling mostly fruits and vegetables. Similarly, organic shops in South Africa and Uganda have also raised the profile of organic produce. (Lyons and Burch, 2007)

2.4 Market for Organic Products in East Africa

Agriculture has historically been the source of livelihood to most East Africans, as well as for food security. Despite the impact of the green revolution, particularly over recent decades, and the introduction of synthetic fertilizers and agrochemicals, agriculture in Eastern Africa is still largely based on traditional method, characterized by no or little use of external inputs, but driven by the timeless wealth of indigenous knowledge (such as for natural pest and disease control, soil management and crop/livestock production) which still paramount in the majority of rural communities within the region.

Key challenges that East African markets face for organic products are lack of reliable supply, lack of demand, deficient supply chains and a lack of business interest. Key strengths are the engaged people and the existence of an organic export sector with good supply capacity. East African countries don't have a unified national organic movement. Such a movement can be pivotal for the development of domestic markets, as it provides a neutral platform for the sector to cooperate and communicate with stakeholders, including buyers and consumers.

Over recent years, national organic movements have been established in each of the five countries (Tanzania Organic Agriculture Movement (TOAM) - Tanzania, National Organic Agriculture Movement of Uganda (NOGAMU) - Uganda, Kenya Organic Agriculture Network (KOAN) - Kenya, Rwanda Organic Agriculture Movement (ROAM) - Rwanda and Burundi Organic Agriculture Movement (BOAM) - Burundi) as co-coordinating, sector representative, and service providing bodies. However, the lack of organic markets and market access remains one of the fundamental factors holding back the development of the organic sector in the region. Trade is the oldest and most tangible auger in creating long-term economic development in rural Africa. Therefore, there is vital need to understand the complexity of the inter-related reasons why there has been little growth in the organic market activity in the region, and why organic farmers are not accessing these markets.

In addition, a majority of consumers within the region are unaware of the value of organic agriculture and products, in terms of health and environment, and therefore are not willing to utilize organic products, particularly where there is no adequate identification in the marketplace (Ndungu, 2006).

2.5 Market for Organic Products in Tanzania.

Production and marketing of organic products in Tanzania are still at the infancy stage despite efforts by the government of Tanzania to launch a campaign in the 1990s aimed at promoting organic agriculture and related services. The local market for organic products in Tanzania is not well developed. This is due to several factors, like a lack of awareness and understanding of organic agriculture principles and standards, and higher prices of organic goods compared with conventional ones. A few, who are well informed about the importance of organic products, do not find the desired range of the products in the local market due to lack of ‘guaranteed sign’ or ‘organic label’. Consumers interviewed in Dar es Salaam felt they were stuck in a market situation whereby organic food production is mixed up with products obtained through other farming practices and it is difficult to trace the origin of the products (Sogn and Mella, 2006).

Tanzania Organic Agriculture Movement (TOAM) is the umbrella organization for organic agriculture in the country and TanCert as a third party certifier, has the mandate to certify farmers who meet the organic standards so as to get the organic certification and market their products with the organic label. There have been initiatives in Morogoro by Slowfood Morogoro to promote and encourage consumption of natural products during the annual commemoration of the world Slowfood day (SAT).

There is increasing awareness of organic produce in Tanzania. Demand has consequently been increasing steadily. This is in part due to the effects of HIV/AIDS. Tanzanians are becoming more health-conscious and increasing awareness of the benefits of organic produce has led to a demand for commodities such as organic brown rice, organic legumes, honey, and others. Local supermarkets such as Shoprite and Imalaseko are keen to meet this demand. A weekly box-supply system is being tried in cities such as Dodoma and Dar es Salaam, whereby a week's worth of organic produce is supplied to households at a time. In addition there is great interest in organic toiletries such as soap, shampoo and various skin creams, with small-scale manufacturers operating both in the local and export markets. Consumers are also interested in purchasing organic eggs and other poultry products due to their better taste and peoples' fear of eating animals which have been intensively raised (EPOPA, 2004).

2.6 Organic Agriculture and food security

A well-managed and accelerated transition to organic agriculture is likely to boost household and national food security. Evidence from other countries clearly shows that organic agriculture production has the advantage of increasing household food security. In Chile, for example, organic vegetable garden systems developed by the Centre for Education and Technology (CET) have demonstrated that even small gardens can be used to achieve all year round household food self-sufficiency, surpassing the productivity of conventional farms (Scialabba and Hattam, 2002).

CHAPTER THREE

3.0 METHODOLOGY

Since the research objective was to assess the willingness to consume organic products amongst households in Morogoro municipal, 100 consumers were randomly selected in different areas including Kilakala, Kigurunyembe, Bong'ola, Kichangani and Forest.

All respondents were interviewed between August and September 2011. Primary data was collected from consumers and producers by means of pretested questionnaires and checklist. The questionnaire was designed to obtain information on consumer awareness and past experiences about organic products, buying preference of organic products and additional willingness to pay for selected organic products. The information regarding the additional willingness to pay was obtained after explaining the benefits of organic product consumption and providing the prevailing price of each type of conventionally produced products. In addition, the last question was designed to obtain respondent's comments and suggestions to improve market for organic products.

3.1 Data Analysis

Statistical Package for Social Science (SPSS) was used in analyzing descriptive data after the data was edited and coded. A descriptive data analysis technique was adopted to explain the distribution pattern and the factors that influence the additional willingness to pay for selected organic products.

CHAPTER FOUR

4.0 RESULTS AND DISCUSSION

4.1 Distribution of Respondents by Age

The results in table (1) show the distribution of respondents by age. Age has impact on consumption of organic products, 15 to 25 years of age has 14 percent, 26 to 35 years of age has 34 percent, 36 to 45 years of age has 28 percent and age above 46 has 24 percent. Consumers of age 26 to 35 years do consume much than any other group followed by the group of age 36 to 45 years.

Table 1: Distribution of Respondents by Age

Age of Respondents	Frequency	Percent
15-25	14	14
26-35	34	34
36-45	28	28
46 and above	24	24
Total	**100**	**100**

Source, survey data

4.2 Awareness of organic products

The results in table (2) show that 89 percent of the respondents are aware of organic products. This can be due to factors such as age, education level and income levels. People that know about organic production are of high income, older and educated. Other variables such as gender and household size, do not affect consumers' awareness of organic products. The remaining 11 percent of the respondents are not aware about organic products due to the factor such as lack of education and low income level. Below is the table showing awareness of respondents.

Table 2: Respondent awareness of organic products

Scenario	Frequency	Percentage
Aware	89	89
Not aware	11	11
Total	**100**	**100**

Source, Survey data

4.3 Consumption of organic products

The results in table (3) show that many people consume organic products as 85 percent of the respondents have already consumed organic products and 15 percent of the respondent had never consumed organic products before. This shows that many respondents consume organic products and this can be due to factors such as good taste, income levels, education, access to organic products and the sustainability of its supply.

Table 3: Consumption of organic products

Scenario	Frequency	Percentage (%)
Who consumed	85	85
Who didn't consume	15	15
Total	**100**	**100**

Source, Survey data

4.4 Awareness about Bustani ya Tushikamane

The results show that 39 percent of the respondents knew about *Bustani ya Tushikamane* and the remaining 61 percent did not know anything about *Bustani ya Tushikamane*, this shows that most people are not aware of existence of *Bustani ya Tushikamane* and this can be due to factors such as lack of advertisement.

Table 4: Awareness about Bustani ya Tushikamane

Scenario	Frequency	Percentage
Who knows	39	39
Who don't know	61	61
Total	**100**	**100**

Source, Survey data

4.5 Education level of respondent

The results show that the majority of the respondents are educated, whereby 9 percent have non-formal education, 25 percent have primary education, 34 percent have secondary education and 32 percent have tertiary education. It can be seen that education level has a positive impact on consumption of organic products.

Table 5: Education level of respondent

Response	Frequency	Percentage
Non formal	9	9
Primary education	25	25

Secondary education	34	34
Tertiary	32	32
Total	**100**	**100**

Source, Survey data

4.6 Frequency of purchasing from individual sellers

Results of the study revealed that 9 percent of the respondents do not purchase fresh fruits and vegetables from individual sellers with trucks and this might be due to unavailability of these services, 34 percent of the respondents often purchase fresh fruits and vegetables from individual sellers with trucks due to availability of the services while 57 percent of the respondents rarely purchase fresh fruits and vegetables from individual sellers with trucks or horse, this can be due to shortage of supply of organic product. Table (6) below shows percentage of respondents purchasing from individual sellers.

Table 6: Frequency of purchasing from individual sellers

Response	**Frequency**	**Percentage**
Never	9	9
Rarely	57	57
Often	34	34
Total	**100**	**100**

Source, Survey data

4.7 Difference in taste between organic and conventional product

Table (7) shows that 83 percent of the respondents said that there is a difference in taste between organic and conventional products, 10 percent of the respondents said that there is no difference in taste while the rest 7 percent of the respondents said that they don't know if there is any difference in taste between organic and conventional products. One of the factors affecting significantly the consumers' willingness to pay for organic products is the taste of the products. It can be seen that, consumers are sensitive to good taste and would not purchase products with bad tastes.

Table7: Difference in taste between organic and conventional products

Response	Frequency	Percentage
Agree	83	83
Disagree	10	10
Don't know	7	7
Total	**100**	**100**

Source, Survey data

4.8 Willingness to purchase organic products

Table 8 shows that 87 percent of the respondents are willing to purchase organic products while 13 percent of the respondents are not willing to purchase organic products. The study on consumers' preferences and willingness to purchase organic products also revealed that educated and high income individuals have increased interest on organic product purchases. The choice for organic products is due to consumer perception that organic products have higher nutritional value and carry low health risk. Consumers decide whether to buy a product or not based on three main aspects: Knowledge, Attitude and Intention. Knowledge about products and their benefits influences their willingness to pay for the products. Knowledge of people is affected by type and quality of information made available to consumers. Advertisement, quality packaging, labeling, pricing and certification play pivotal role in determining the attitude and intention to purchase organic products.

Table 8: Proportion of respondents who are willing to purchase organic products

Response	Frequency	Percentage
Agree	87	87
Disagree	13	13
Total	**100**	**100**

Source, Survey data

4.9 Willingness to pay higher price for organic products

The results in table (9) give an indication that 78% of the respondents were willing to pay a premium for organic products. Once a consumer is ready to buy, the next step is to see how much he or she is willing to pay for the product. Purchase behavior reflects the real Willingness To Pay (WTP) and the gained positive or negative experiences which will reversely affect consumers' WTP in future. Knowledge and awareness have respectively, direct and indirect effects on attitudes toward consumer to choose the products, and the willingness to pay a price premium, so they are important factors determining the demand. Thus, awareness and knowledge about organic products are critical for the willingness of the consumer to pay more for the product. Linking this with the socio economic characteristics of the respondents, (such as age and educational status), it is concluded that there is a potential market for organic products in the studied area.

Table 9: Proportion of respondents who are willing to pay a higher price for organic product

Response	Frequency	Percentage
Agree	78	78
Disagree	21	21
Don’t know	1	1
Total	**100**	**100**

Source, Survey data

4.10 Home Delivery of Organic Products

Table (10) shows that 86 percent of the respondents like to see that organic products are delivered at their home premises while 14 percent of the respondents said that they are able to visit the shop and purchase because they are living near the shop. Access to organic products and the sustainability of its supply is an important factor which may play a role in the consumer’s decision toward organic products.

Table 10: Proportion of respondents who like home delivery

Response	Frequency	Percentage
Agree	86	86
Disagree	14	14
Total	**100**	**100**

Source, Survey data

CHAPTER FIVE

5.0 CONCLUSION AND RECOMMENDATION

This study was made to assess consumers' attitudes and willingness to pay for organic products. The main motives to purchase organic products are because such products have benefits for health and the environment.

Knowledge and awareness about organic products can affect attitudes and perceptions about the product and ultimately buying decisions of the consumers. It is seen from the results that, vegetables followed by fruits are the most preferred and highly demanded products at present. Quality characteristics also affect consumers' preferences for organic products; with the most important including health and nutritional value, taste, and general appearance. Consumers' willingness to pay is influenced by limited and erratic supply, higher price of the products and very limited access to information. They also agree that organic vegetables are healthier, tastier, and costlier, have no harmful effects and are of better quality than the conventional products and they are also willing to pay price premiums.

The most likely factors that affect consumers' in the socio-professional category(house hold income level) willing to pay for organic products in Morogoro municipal, the level of information and awareness about the risks of heavy chemical residues in conventional products and the taste of organic products. Beside the information about health risks, the sustainable supply of organic products and the label to guarantee the quality of the product are dominant factors in consumer's decision making.

This study showed that there is a consistent potential demand for organic products but customers need to be sensitized about the health hazards linked to chemical residues through sustained information campaigns. Labeling of organic products will help to identify the produce at least for consumers who are willing to pay for organic vegetables and price premiums.

The results of Willingness to Pay (WTP) estimates obtained for the selected products indicate that organic products are positively valued in Morogoro municipal, since consumers affirm to be willing to pay price premiums to acquire these products of better quality.

These consumers know what organic stands for, they perceive products scarcity and irregular availability in the market, and they would be willing to increase consumption if these products were cheaper. Taking into consideration that one of the final aims of every food policy should be consumers´ health, the high premiums of effective prices question or, at least, condition the purchase of these healthy products, even when an important population sector expresses its true desire to acquire them. On the other hand, the limited possibilities lower income level households have to access organic products are clearly evidenced.

To conclude, scarcity as well as high price premiums are identified as the most difficult obstacles to overcome when it comes to domestic consumption expansion in Morogoro municipality.

The involvement of general organic products retailers in the organic food market is of major importance and should be encouraged in order to increase organic products market share. Therefore, an increase in production levels is a must together with reductions in production, processing and/or trading costs, which, in turn, translate into sale price reductions, and into an increase of organic products consumption. Lower distribution costs constitute a contributing factor, which reduce consumer price premiums by involving general food retailers.

Furthermore, to achieve a higher degree of market share, organic marketers should introduce their products to a correct target group by adopting proper marketing strategies. To do so, the organic market actors must convince themselves that there is a growing consumer demand for organic products and that any efforts they make to increase the supply of organic products will enhance their competitiveness; however, a high level of market transparency must be assured.

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APPENDICES

List of Organic products	Preference according to number of respondents
Fresh vegetable	99
Fresh fruits	99
Spices	95
Cassava flour	90
Soya drink	89
Honey	89
Hibiscus	85
Fish	80
Chillies	75
Starfruit pickle	73
Mango pickle	71
Dried fruits	69
Peanut butter	65
Organic coffee	62
Organic tea	60
Palm oil	42
Dried vegetables	40
Soya for meat	35
Soya for milk	10
Organic cosmetics	0
Organic clothes	0