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# Demand-led Research Priority Setting in the Kenyan Floriculture Industry

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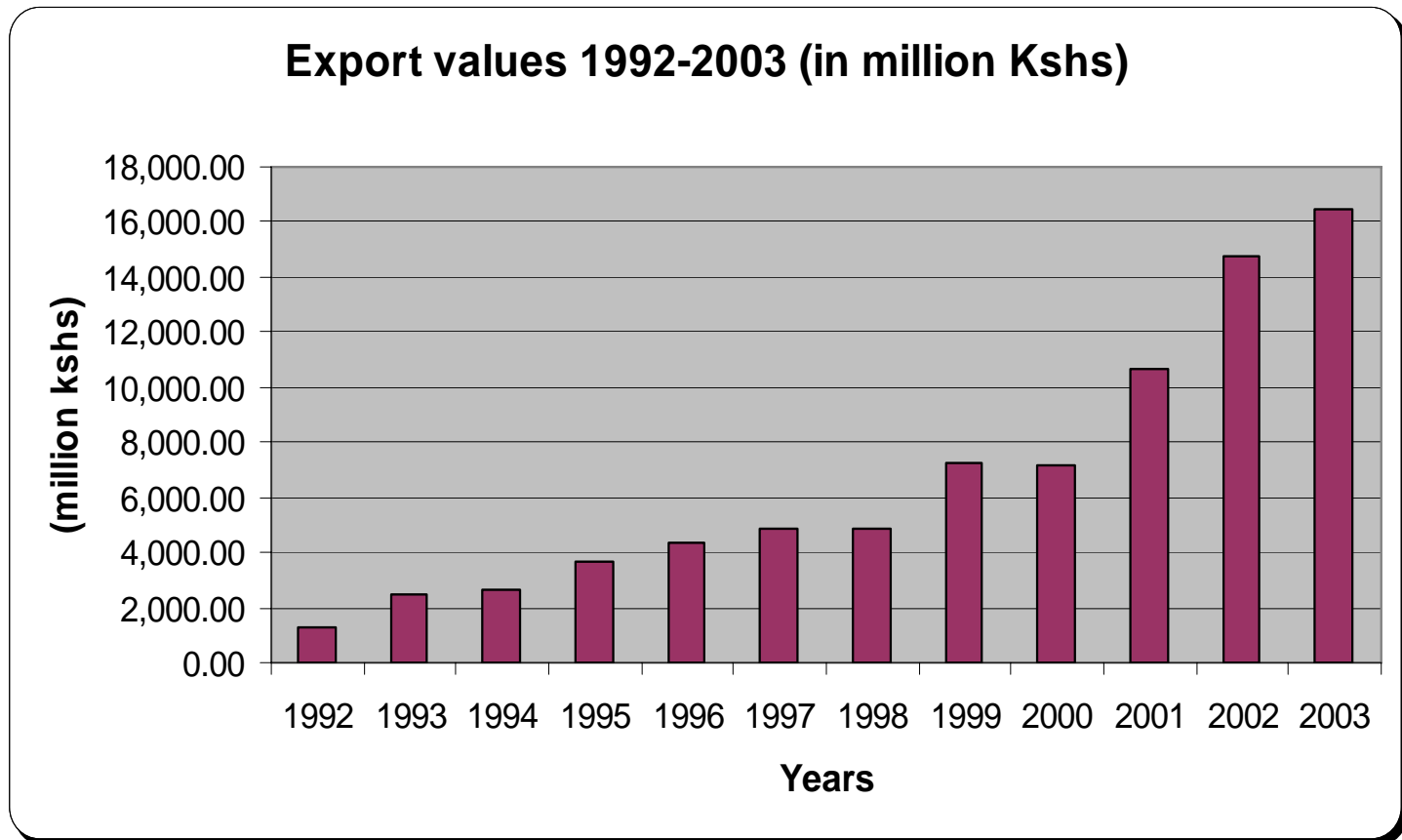
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# Kenya's cut flower Industry: An outlook

- Continuous growth in value, volume and acreage over the last decade
- Expansion rate: 200 ha per annum
- Constitutes more than 60 % of horticultural exports
- Accounts for 1.5 % of the GDP
- 8% of Kenya's total export revenues
- US\$ 200 million to the national economy annually
- Employs up to 2 million people both directly and indirectly

# Growth In Floriculture Export (In Kshs. Million)



# Industry profile and organization

- Dominated by large-scale growers accounting for 97% of exports in 2004; modern technologies; marketing links/arms; bargaining power
- Small holders grow summer flowers and accounted for 3% of exports in 2004; contract farming/marketing
- Contribution of small scale growers has been diminishing over the years

## Estimated Summer Flower Share of the Total Volume (million tons) produced (Fintrac, 2005)

Year	2000	2001	2002	2003
Total	38,756	41,396	52,106	60,982
% share of total	13.5	9.2	6.4	5.1

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# Key Actors in the Floriculture Industry

- Entrepreneurs (growers/exporters)
- Research/training institutes
- Quality control and regulatory agencies
- Farm in-put suppliers
- Credit and finance institutions
- Marketing Trade and Investment promotion agencies

# Kenya's Policies & the floriculture industry

- Limited government involvement
- Sessional Paper 1 of 1986:
  - Strengthened HCDA: construction of new marketing centers, experimenting with sea freights and market diversification
- Sessional paper (1994) Industry to “develop mutually beneficial contractual links with research institutes for the generation viable technologies”
- PRSP (2001): Pluralism in extension service provision and building a participatory technology development and transfer system

# Key findings from the ASTI case study (2004)

- **Weak interactions between the national R&D and the growers**
  - Over-reliance on external knowledge and expatriates to solve industries problems
  - Under-utilized research capacity
- **Inadequate attention to the small-holders**
  - Fintrac (2005) findings
  - Many fall out of business
- **Weak extension system**
  - Inadequate information flow and learning from R&D and PRIs
  - Horizontal knowledge flows amongst the growers/exporters

# Understanding the findings from ASTI – why the weak interactions?

- Organizational cultures and procedures
  - Private – public approach to knowledge acquisition, sharing and use
  - Bureaucracy vs farmers' urgent needs
- Attitudes and perceptions
  - Failure to recognize/harness farmer innovations
  - Fear of losing innovations
- Weak operational capacity of public institutions
  - Lack of adequate facilities/financing
  - MoUs for service delivery

# What next? - Bridging the gaps in Kenya's floriculture system

- 1<sup>st</sup> level intervention– Training workshop in demand led research (ATPS/CTA/CABI) - 2005
  - Build capacity of stakeholders to prioritize and conduct demand-led agricultural research
  - Strengthen the interface between and among actors in the ASTI system, leading to improved information and knowledge flows
  - Begin closer dialogue between researchers and consumers of research

# Bridging the gaps in Kenya's floriculture system

- 2<sup>nd</sup> level intervention: The demand-led research priority setting in the floriculture industry
  - Multi-stakeholder Taskforce
    - Farmers, Research (KARI), Gov't/Policy (MoA), Marketing/QC (HCDA)
    - MoU: roles/responsibilities, resources/budgets, IPR
  - Regional consultative forums in major growing areas – emphasis on small-holders
  - Synthesis of the priorities from the regions into national priorities
  - Inventory of recent/ on-going research vs farmer's concerns
  - Dissemination workshops and policy briefs

# Key issues from the regional stakeholder meetings

- Need to harness farmer innovations
- Need to develop indigenous flowers for commercialization
  - Harness biodiversity and develop a “Kenyan brand”
- Exploitation of small-scale growers by middlemen
- Need to disseminate research findings widely, preferably in local languages
  - Need for a one-stop floriculture **knowledge** center

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# Key outcomes from the Demand-led Research priority setting

- Farmers came up with a prioritized list of research topics to address both short-term and long-term needs and urged national R&D to respond to their needs
- Farmers drew up a prioritized list of recommendations that require policy action/intervention
- Farmers and other actors (notably, research) have begun working together

# Recommendations

- The floriculture industry faces new competition/threats following the end of Lome IV Convention. To remain competitive, it requires continuous innovations.
- Floriculture research should focus/target farmers / growers identified/prioritized needs.
- Training/capacity building for small-holder growers on pre/post-harvest handling, growing techniques, disease control
- Facilitate access to information; in local languages

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# Recommendations

- Recognize and harness farmer innovations
- Strengthen the interface between researchers and farmers / growers e.g. through knowledge exchange workshops
- Facilitate market access: phyto-sanitary requirements, standards compliance and market research

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Contact CTA and ATPS for copies of the policy brief:  
Research Priorities for Kenya's cut-flower industry: *Farmers  
perspectives*

**Thank you**

