STUDY

MARKUP
EU-EAC MARKET ACCESS UPGRADE PROGRAMME

The Potential of Geographical Indications in Tanzania.

Coffee, tea, avocado and spices.

Co-funded by the European Union

East African Community

International Trade Centre

Disclaimer

ABOUT THE PAPER

The International Trade Centre (ITC) is a joint agency of the United Nations and World Trade Organization (WTO) based in Geneva. ITC's mission is to enable small business export success in developing and transition-economy countries, by providing, with partners, sustainable and inclusive development solutions to the private sector, trade support institutions and policymakers.

ITC is one of the implementing agencies for the Market Access Upgrade Programme (MARKUP-the 2018-2023), a regional initiative aiming at improving market access to European Union (EU) and the East African region for five East Africa Community (EAC) partner countries - Burundi, Kenya, Rwanda, Tanzania, and Uganda – coffee, cocoa, tea, spices and horticultural sectors. MARKUP is funded by the EU 11th European Development Fund over the period 2018-2022.

Within the MARKUP Tanzania National Window component, ITC pursues Result 1: Enhanced awareness of sector enablers through market analysis and research, improving information on EU destination markets, which includes a professional EU market study for priority sectors in Tanzania. This study aims is to complement the above-mentioned study by presenting additional market opportunities in the context of Geographical Indications (GIs) for Tanzanian product.

January 2023

Author: Dr. Innocensia John, Department of Agricultural Economics and Business, University of Dar es Salaam

Table of Contents

ACRONYMS

ASDS II	Agricultural Sector Development Strategy II
AU	African Union's
BPRA	Zanzibar Business and Property Registration Agency
BRELA	Business Registrations and Licensing Agency
CAADP	Comprehensive Africa Agriculture Development Programme
CM	Certification Mark
COSOTA	Copyright Society of Tanzania
COSOZA	Copyright Society of Zanzibar
EU	European Union
FCC	Fair Competition Commission
GAP	Good Agricultural Practices
GDP	Gross Domestic Product
GI	Geographical Indication
ITC	International Trade Centre
MARKUP	The Market Access Upgrade Programme
MSMEs	Micro, Small and Medium enterprises
MVIWATA	Mtandao wa Vikundi vya Wakulima Tanzania
OAPI	African Intellectual Property Organization's
PDO	Protected Designation of Origin
PGI	Protected Geographical Indications
TanTrade	Tanzania Trade Development Authority
TARI	Tanzania Agricultural Research Institute
TBS	Tanzania Bureau of Standards
TCB	Tanzania Coffee Board
TCCIA	Tanzania Chamber of Commerce, Industry and Agriculture
TCDC	Tanzania Cooperative Development Commission
TM	Trademark
TRA	Tanzania Revenue Authority
TSG	Traditional Specialty Guaranteed
WIPO	World Intellectual Property Organization
WTO	World Trade Organization
ZBS	Zanzibar Bureau of Standards
ZFCC	Zanzibar Fair Competition Commission
ZFDA	Zanzibar Food and Drug Agency
ZNCC	Zanzibar National Chamber of Commerce
ZRB	Zanzibar Revenue Board
ZSTC	Zanzibar State Trading Corporation

SECTION ONE: GEOGRAPHICAL INDICATION CONTEXT

Introduction

This report carefully studies the potential of GI in Tanzania for coffee, tea, avocado, and spices. It establishes the potential for GIs in Tanzania by providing a clear analysis on local and global scales. It is presented in five sections: Section 1 covers a brief overview of geographical indication, methodology, background and the legal and institutional framework of Tanzania; Section 2 discusses the conditions necessary to achieve GI, trade benefits, and global lessons; Section 3 provides discussion on the potential crops, i.e., coffee, tea, spices, and avocado; and Section 4 concludes on the key policy recommendations and gaps. The key objectives of the reports are achieved by:

i. Carefully examine the potential for a price premium for Tanzanian products as a result of the introduction of a GI or potential for product differentiation, allowing penetration or expansion of export markets- regional or international.
ii. Examining the feasibility of the institutional structures in Tanzania in the sectors to sustain or protect GI, that is, the degree of readiness for Tanzanian institutions and producers to apply for and eventually manage a GI.
iii. Providing the conditions necessary in Tanzania to achieve GIs for the respective products.

The report makes use of secondary data from grey literature, published research papers, academic theses, government and local council documents, International Trade Centre (ITC) The Market Access Upgrade Programme (MARKUP)[1] official documents, National Bureau of Statistics (NBS) and global datasets obtained through a desk review. The report uses survey data from John et al. (2016), who investigated the potential of GI products in Tanzania for coffee, sugar, rice, aloe vera, and cloves. This report uses some of the key findings to establish the trade potential of agricultural products in Tanzania for the local and international markets by building on the already established potential of these crops in the export market

1.1 Background

Geographical Indication (GI) originates from the French concept of "terroir" [2] and is based on the link between a product and its geographical and human environment. It identifies a product as originating in a certain region or country (Charbonneau J., 2011). It is a sign used for products that have a specific geographical origin and possess qualities and a reputation (Protected Geographical Indications (PGI)) or exclusively (Protected Designation of Origin—PDO) due to spatially embedded natural and human factors (De Filippis et al., 2022). GI was recognised as a particular form of intellectual property right by the World Trade Organization (WTO) in 1994, and it is economically and legally inclusive. The Paris Convention for the Protection of Industrial Property of 1883, the Madrid Agreement of 1891, the Lisbon Agreement for the Protection of

[1] https://www.eacmarkup.org/resources/publications/studies and https://intracen.org/our-work/projects/eu-eac-market-access-upgrade-programme-markup

[2] the essential link between the location in which a food or beverage is produced and its quality or other consumer attributes (Josling, 2006).

Appellations of Origin and their International Registration of 1958, and the World Intellectual Property Organization (WIPO) are considered the backbone of GIs (Mwakaje, 2021). According to WIPO, there are four main ways to protect a geographical indication: 1) so-called sui generis systems (i.e., special regimes of protection); 2) using collective or certification marks; 3) methods focusing on business practices, including administrative product approval schemes; and 4) through unfair competition laws [3].

Products that can be protected under GI include agricultural products, foodstuffs, wine and spirit drinks, handicrafts, and industrial products. In the European Union (EU), GI has become increasingly known and used for the protection of wines and spirits, and it has been extended to other products such as tobacco (European Commission, 2012). Placing a product under GI protection reduces the likelihood of piracy, fraud, and counterfeiting. It links consumers and producers, and this boosts farmers' incomes through improved price premiums and market access (Santeramo and Lamonaca, 2020). The benefits accrue to the producer through labelling their products with a GI label, which enables them to earn a higher price for their product compared to producers of similar product. Such benefits are channelled to the producer through product recognition in the market, which has to be built by creating awareness of the product's special attributes. It is also important for biodiversity protection, indigenous and traditional knowledge protection.

GI helps empower Micro, Small and Medium enterprises (MSMEs) to "resist" capture by global value chains. It can also channel larger shares of the price premiums consumers pay to MSMEs and smallholder producers of original products (Egelyng et al., 2017). Thus, marketing products using GIs captures premiums in the marketplace (Babcock & Clemens, 2004). The European Union's (EU) agricultural origin foods and other products registered with PGIs add 15 billion euros per annum to European agriculture (European Commission, 2012).

In Africa the AU Continental Strategy for Geographical Indications in Africa (2017-2022) and the Comprehensive Africa Agriculture Development Programme (CAADP)[4] a now Agenda 2063 continental initiative provide a context for promoting wise use of market forces - and thus market instruments such as GI´s that aim to improve trade-related capacities for market access. CAADP provides knowledge of relevance to policy options for the wise use of market forces to pull agri-environmental policies by establishing four key priorities that aim to help African countries eliminate hunger and reduce poverty by raising economic growth through agricultural development.

In Africa, there is an emerging interest in the recognition of GI products. The African Union developed a continental strategy for geographical indications in Africa from 2018 to 2023, which aimed to identify potential GIs in Africa and how they can support food security and sustainable rural development, and encourage trade that can lead to economic development on the continent (AU, 2017). GIs in Africa are included in the African Intellectual Property Organization's (OAPI) legal framework for IP since the

[3] https://www.wipo.int/geo_indications/en/

4 While the EU Quality Regime (which includes the EU GI regime) is part of the taxpayer funded EU CAP, Africa has no [taxpayer funded] CAP, instead Africa has CAADP which is a very different story

1977 Bangui Agreement (revised in 1999)[5]. Under the Bangui agreement (Annex VI of the agreement), GIs are protected through a sui generis system (OAPI, 1999). In Africa, the first GI products were identified in Cameroon, Cote d'Ivoire, and Guinea-Conakry. These products were Penja pepper and Oku white honey from Cameroon and Ziama-Macenta coffee from Guinea-Conakry (Chabrol et al., 2017). To date, several countries in Africa have identified several potential GI products and established characterizations for registration, with an increasing number of registered products (for more example of GI case studies see Appendix 1). The legally registered GI appears in forms such as "Protected Designation of Origin" (PDO), "Traditional Specialty Guaranteed" (TSG), and "Protected Geographical Indication" (PGI) (Giovannucci et al., 2009) (Figure 1).

Figure 1: Geographical Indication Labels: from the left, PDO (Protected Designation of Origin); PGI (Protected Geographical Indication); and Traditional speciality guaranteed (TSG)

However, the development of GIs in Africa is in its infancy, with farmers and administrators lacking awareness and technical capacity. For GI protection to be implemented, the potential products need to be protected within national laws under a wide range of concepts, such as laws against unfair competition, consumer protection laws, laws for the protection of certification marks, or special laws for the protection of geographical indications or appellations of origin. At present, there is a lack of intellectual property exploitation and insufficient marketing strategies for most African countries.

To realise the benefits of GIs, African countries need to attach legal, economic, technical and cultural implications to geographical labelling in their individual countries. In East Africa countries, some potential products have been identified, like Kivu coffee from Burundi, mountain tea from Rwanda, and cloves from Zanzibar, which already have legislation that provides for the protection of GIs. Other EAC countries have more products with the potential to be labelled GIs, such as Kenyan tea and coffee, Kakira sugar (Uganda), and many more (reference – because for GI to be present there is a

[5] https://www.wipo.int/wipolex/en/text/181144

need of having a technical justification of that uniqueness “specific characteristics” then the rest of procedure will follow).

Tanzania acknowledges the importance of GIs and has identified some agricultural products (John et al., 2016) that have the potential for this kind of protection however there is no legal and regulatory framework to support the same. Notwithstanding, in other EAC country there is a regulatory framework for the same, for instance in Kenya, geographical names are protected through certification marks or collective marks under the Kenya Trademarks Act. There are, however, a number of products in the Tanzania that could potentially qualify as GIs. These products are chosen based on the following criteria: a) a clear delimitation of the production area; b) the reputation of the product's origin; and c) consumer perception quality in terms of taste or flavour, texture, aroma, and appearance (e.g., colour, size). More of the criteria are market potential (price comparison with similar products), geographical link (soil and land weather characteristics), agricultural system (organic, traditional methods), and collective actions (formal or informal producer organisations).

1.2 Tanzania potential for GI

In Tanzania, the development of GIs is at an early stage, with farmers and administrators developing awareness and technical capacity at a basic level. Studies have identified the economic and legal potential of GIs in Tanzania (Ndembeka, 2013; John et al., 2016; Sengo, 2017; John, 2017; John, et al., 2020; Mwakaje, 2021) as well as the potential for consumers (John, 2022). GI development is the interplay of producers, processors, sellers, and traders, where the producer knows and establishes the product quality in the market through creating awareness and protecting the quality of the product. Through advertising and market research, the product has the potential to reach both local and international markets. Tanzanian products hold such potential but need a strong organisational and institutional framework to maintain, market, and monitor potential GIs. Local institutions and management structures may be required to show a long-term commitment to cooperation on the core processes by identifying and fairly demarcating a GI, organising existing practises and standards, and establishing a plan to protect and market the GI.

Producers and enterprises of potential GI products in Tanzania are equally involved in the value chains of these products. The markets require being strongly controlled by the market partners and having a commitment to promote and commercialise over the long term. Lessons from successful GI countries (Appendix 1 and Table 2, 3 and 5) show that many of the GI market successes are the result of mutually beneficial

business relations whereby consistent market positioning and effective commercialization have led to a long-term market presence.

A strong domestic GI system, as well as effective legal protection, must be carefully established for protection. This would permit effective monitoring and enforcement in relevant markets to reduce the likelihood of fraud that can compromise not only the GI's reputation but also its legal validity. Some of the potentially identified products, as shown in Table 1, in the country are suitable for GI protection and were established using the FAO guidelines (FAO, 2010). The list has include the maximum possible number of products, both cash and non-cash crops, as well as food and non-food products. The goods are among a wide variety of African-origin products assessed for GI potential; a selection was investigated from a comprehensive list of crops. Coffee and cloves are two crops whose characteristics have been thoroughly researched, along with information on their qualities, traits, and circumstances for increasing its potential in the global market (John, 2017; John et al., 2020).

Table 1: Potential GI products in Tanzania

Region	Products
Mbeya	Kyela Rice, Cacao
Unguja and Pemba- Zanzibar	Cloves, Seaweed
Iringa	Tea, Mangroves, coffee, avocado, Bamboo wine.
Njombe	Avocado
Tanga	Oranges, spices
Songea	Kantalamba Rice, Coffee
Dodoma	Wine (grapes-Zabibu)
Arusha	Rift Valley Coffee, Masai Clothes, Tanzanite, Tea.
Bukoba	Plantain, Coffee
Kilimanjaro	Kilimanjaro Coffee, Sugar- TPC, Aloe Vera

1.3 The legal framework in Tanzania

Despite being a founding member of the WTO and a signatory to the TRIPS agreement, Tanzania has no specific policy or legislation governing the protection of GIs. All the policies and programmes in place are to develop the agricultural sector of Tanzania, but none of them consider GI protection. Tanzania has a crop-specific legislative approach that focuses on major cash crops such as the Coffee Industry Act 2001, the Sugar Industry Act, Tea Industry Act 2001, National Agriculture Policy and Cereals and Other Produce Act, 2009 (AGRA, 2019). In addition to the crop-specific laws, Tanzania is supported by an elaborate system of policies and strategies to prioritise growth and attract private investment.

Nevertheless, the sector is strategically supported by Agricultural Sector Development Strategy II (ASDS II) – a countrywide specific approach to develop the sector, further it is also impacted the African Union's (AU) Comprehensive Africa Agriculture Development Programme (CAADP) , which aim to eliminate hunger, reduce poverty, and transform the sector from predominantly subsistence to commercial (Kibugi et al., 2015). The policies recognize the need to promote agricultural and trade activities without recognising geographical indication issues. Therefore, for GIs to be implemented, they need to be recognized within national laws under a wide range of concepts. GI in Tanzania is only really considered in the Industrial Property Law, a branch of intellectual property rules that has distinct subject matters that are protected

or capable of being protected under the corresponding legislation (Mwakaje, 2021). Industrial property includes patents, trade and service marks, industrial designs, geographical indications, layout designs, trade secrets, protection against one-sided competition, and plant breeding rights.

The United Republic of Tanzania is a union between Tanganyika and Zanzibar, under which only matters pertaining to the union are centrally regulated and the rest are independently addressed by each side of the union. In Tanzania, the Mainland, an inference can be drawn from the provisions of the Trade and Service Marks Act, while Zanzibar has included the protection of GI in the Industrial Act of 2008 to guide its crops: spices, cloves, and seaweed. Currently, Tanzanian GI protection can be obtained through certification or collective trademarks. Tanzanian mainland producers can temporarily register their products as trademarks because there is no sui generis GI system. Different policies provide an enabling environment for the protection, marketing, and promotion of crops that can benefit the government and the producers. With such laws in place, the government will have room for improvement by incorporating the aspect of GI where a sustainable market may be achieved.

1.4 Institutional structures in Tanzania

In Tanzania's mainland and Zanzibar, the agricultural and trade sectors involve the government at the national and local levels, and private sector organizations in the implementation of their policies and programs. Figure 2 illustrates the different institutions necessary for the coordination of GI in the country. These include public institutions such as government ministries (the Ministry of Agriculture in Tanzania, the Zanzibar Ministry of Agriculture, Irrigation, Natural Resources, and Livestock, the Ministry of Investment, Industry, and Trade Tanzania, and the Ministry of Trade and Industrial Development Zanzibar), whose roles among others include formulating, coordinating, monitoring, and evaluating policies and regulating crop institutions. The ministries monitor crop quality to ensure competitive markets; develop and promote improved agricultural practices; promote primary production, processing, marketing, and the provision of support services; create an enabling environment for industrial and trade development; promote and protect copyright and intellectual property rights; and promote farmer organisations for empowering farmers. Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA), and Zanzibar National Chamber of Commerce (ZNCC) that promote industry and business and facilitate an interface between the private sector and public sectors.

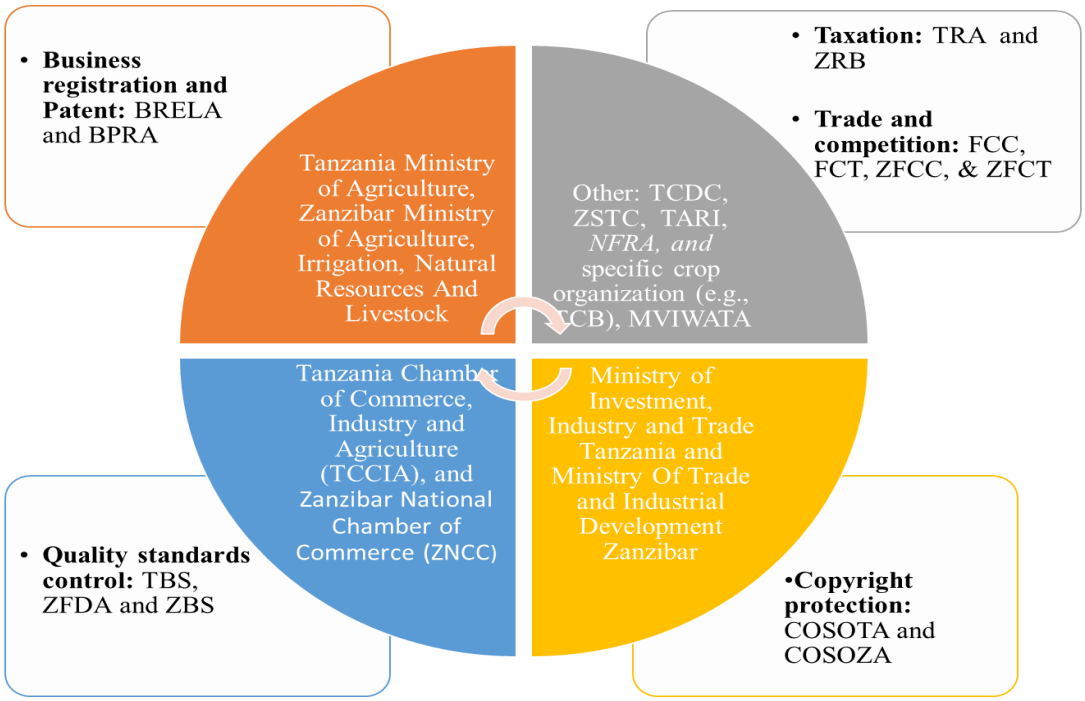
The agencies responsible for patent and trademark registration include the Business Registrations and Licensing Agency (BRELA) and the Zanzibar Business and Property Registration Agency (BPRA). In addition, government parastatals such as the Copyright Society of Tanzania (COSOTA) and the Copyright Society of Zanzibar (COSOZA) set out to promote, protect, and defend the interests of copyright and related rights holders by reducing piracy and collecting and distributing royalties or other remuneration. The Tanzania Bureau of Standards (TBS), Zanzibar Bureau of Standards (ZBS), and Zanzibar Food and Drug Agency (ZFDA) are responsible for quality control of products of all descriptions and for promoting standardization in industry and commerce. Tax agencies (Tanzania Revenue Authority (TRA) and Zanzibar Revenue Board (ZRB)) that assess, collect, and account for all revenue

collected under relevant tax legislation and monitor and ensure the collection of fees and levies to promote fair trade and competition. Tanzania has public institutions such as the Fair Competition Commission (FCC) and Zanzibar Fair Competition Commission (ZFCC) that promote and protect effective competition in trade and commerce while also protecting consumers from unfair and misleading market conduct. The ultimate goal is to increase efficiency in the production, distribution, and supply of goods and services.

Other institutions are commodity boards, such as the Tanzania Coffee Board (TCB) and the Zanzibar State Trading Corporation (ZSTC), which provide regulatory services to promote good quality products and promote the production, value addition, and marketing of their respective crops. The Tanzania Cooperative Development Commission (TCDC) regulates and promotes cooperatives. The Tanzania Agricultural Research Institute (TARI) conducts, regulates, coordinates, and promotes agricultural research activities that contribute to increased agricultural productivity through the development and deployment of improved agricultural knowledge and technologies. Farmer organisations in the form of cooperatives are also important for the operation of GI in Tanzania; these associations or groups are important means of protecting farmers or producers of various origin products. Among the organisations that represent farmers' interests is the National Network of Farmers Groups in Tanzania, also known in Kiswahili as Mtandao wa Vikundi vya Wakulima Tanzania (MVIWATA).

Growth of GIs in Tanzania requires an appropriate institutional setting. A change in the institutional structure of Tanzania may enable the involvement and functioning of GIs (Mhando, 2014). The institutional structure consists of property rights, enforcement mechanisms, human behaviours, and power relations in an economy. It also includes constitutionally determined government structures; legal systems; beliefs, such as religions; and norms, such as trust and lawfulness (North, 1990). The institutional environment provides structures in which economic decisions, actions (selling, buying, and negotiating), transactions, and flows (resulting from the aggregation of these transactions) are embedded.

Figure 2: Institutional framework



SECTION TWO: CRITERIA AND TRADE POTENTIAL FOR GIs

2.1 Conditions necessary to achieve GIs

Tanzania has many high-quality agricultural and non-agricultural products with the potential for GI. GI has the potential to add value to these products, making them fetch a higher premium in the local and international markets. However, the development of GI products requires a sound legal (legislative and regulatory) and institutional framework, enabling the recognition and protection of collective property rights attached to GI in a given territory. Some key considerations include establishing and regulating a sustainable development framework for GIs, the promotion of trade, value redistribution along the food value chain, protecting and supporting public benefits, the environment, and cultural value. In this case, the producer plays a key role in the success of a GI, building market potential for these products and providing the producer with a price premium from trading with high-quality products through establishing such value for consumers. Therefore, for Tanzania to achieve GI registration of its crops and enjoy the food benefits of marketing its products with GI registration, it needs to carefully understand the GI process, which includes:

i. **Identification:** All the potential GIs in the country (using the selection criteria for a potential GI in Figure 3) and creation of awareness and appreciation of the potential of the local product by the local people, after the product or good has been identified as potential GI.

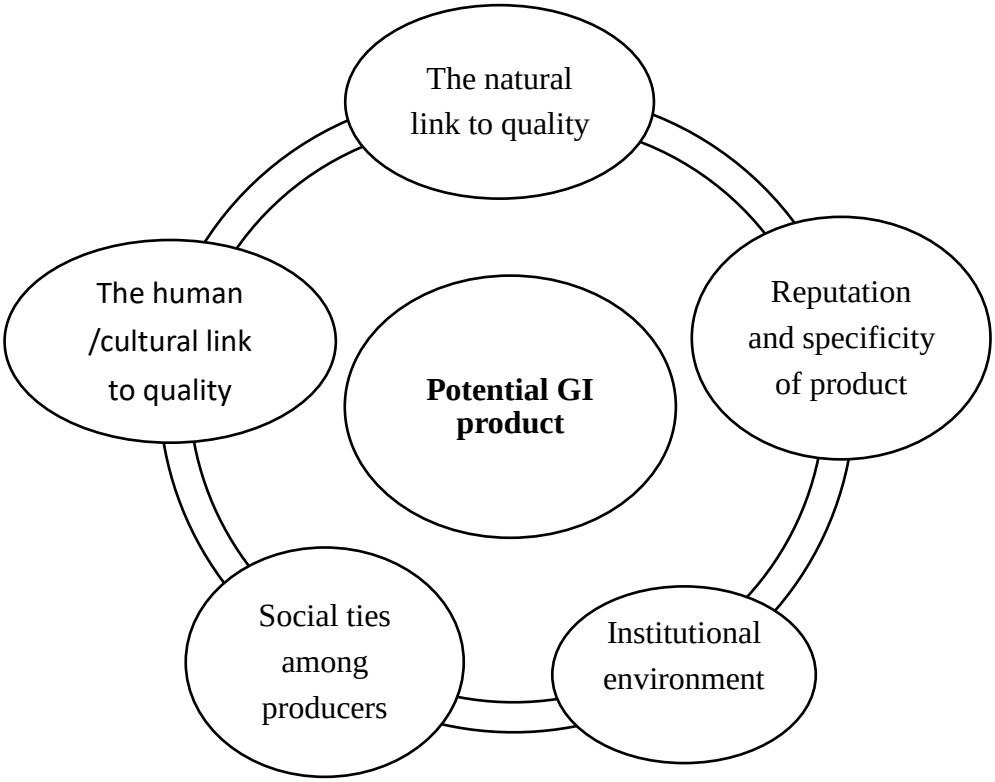


Figure 3: Criteria for a potential GI
Source: (Egelyng et al., 2017).

GI potential is made up of *the natural link (i.e., the natural setting, environmental and climatic conditions, etc.)* of the area of production, which affects (or is believed to affect) the quality attributes of the product; *the human link*, that is, the cultural environment, cultural heritage, traditions, and history, and local know-how that affect the product, such as through certain production and processing activities; *social ties,* such as trust and cooperation among producers; and collective efforts found in cooperative or other types of producer associations and groups; *reputation and specificity of the product*, linking consumer awareness of the product to its specific quality and characteristics, which is an important prerequisite for GI success; and institutions, which refer to formal and informal rules governing the production and marketing of the product and are affected by the presence of local NGOs, state authorities issuing regulations, extension officers, research bodies, etc.

ii. After detailed documentation of the potential GI products on the different characteristics of the product from production to marketing, this calls for the institution or establishment of clearly stated rules for value creation, preservation of local resources, and maintenance of the requisite standard.
iii. Then, as an institution, organize the producers and take quality-control measures before finally applying to register the potential ones.

2.2 Trade benefits of GI

De Filippis et al., (2022) established that GIs positively affect trade by examining how they support international trade and the controversy among countries over the effect of their certification. The study confirms GI success due to increased trade for intra and

extra EU countries. China, which has the most registered GIs and uses two distinct regimes: collective trademarks and sui generis rights (Ferrante, 2021). GI certification provides the user the right to protect the registered GI on the specified goods and enables the producer to control prices, i.e., charge premium prices that enhance profits. The presence of GIs in the EU has had a positive trade effect on both the extensive and intensive trade margins in the export market; they affect export prices, which consumers associate with higher quality goods (Raimondi et al., 2020). Among others, GI certification enables a producer to obtain the following benefits:

1. Protect the reputation of the product, which has been built and maintained because of its link to geographical location.
2. Quality standards of the product against misleading terms
3. Protection against misleading TMs: Where a TM consists of a GI and the use of the GI in the TM is likely to mislead the public as to the true place of origin of the product, the TM may be refused or revoked. There is a significant difference between a TM and a GI. (please see Appendix 2)
4. The identity of producers can be protected under a GI mark, and the GI mark can contribute significantly to the profits of farmers, manufacturers, and distributors.

GI information assists consumers in determining the quality of a product as well as distinguishing authenticity from the counterfeit for those willing to pay more. In general, GIs support the development of a regional tourism industry and give MSMEs a competitive edge in the global markets.

The essence of traceability in GI

The traceability of products under geographical indication forms a key point in the proof of origin. Monitoring of production, warehousing, channels of distribution, sales, and exports remains the cornerstone of the success of geographical indication. This continuous monitoring ensures that the products maintain their authenticity and quality from their point of origin to their final destination. This allows for the authenticity and quality of the product to be maintained, ensuring that consumers receive the product they expect. It also allows for quick identification of any potential issues and prompt resolution, helping to maintain the integrity of the geographical indication. Traceability not only protects the rights of the producer, but also the consumers, who can be confident in the authenticity of the product they are purchasing. Furthermore, traceability helps to prevent fraudulent practices and protects the reputation of geographical indications. As a result, it is an essential aspect in ensuring the sustainability and success of geographical indications and maintaining the trust and confidence of consumers in the products they purchase. Traceability plays a crucial role in maintaining the authenticity, quality, and reputation of products under geographical indication, and is therefore essential for their success.

2.3 Global Lessons for the success of GI

GIs are critical for a country's economic development because they provide legal protection to the product by preventing its unauthorized use by other countries or manufacturers. Countries have different institutional frameworks, and different legal

systems support GI products. Their different legal and institutional frameworks that facilitate their protection contribute to the success of many GI-registered countries. (Giovannucci, 2008) identified four components that emerged from case studies and literature reviews as being essential considerations for GI: strong organizational and institutional structures to maintain, market, and monitor the GI; equitable participation among the producers and enterprises; strong market partners committed to promote and commercialize the GI over the long term; and effective legal protection, including a strong domestic GI system. The institutional structure helps to maintain, market, and monitor the GI (Table 2). The complex process of identifying and fairly demarcating a GI, organizing existing practices and standards, and establishing a plan to protect and market the GI requires building local institutions and management structures with a long-term commitment to participatory methods of cooperation.

The institutional structures to maintain the quality process and monitor or certify compliance are important, but even more vital are the resources and participatory political processes required to achieve the consensus needed to have effective regulations and geographical delineations. The institutional structure of the countries is important in explaining how successfully they have been able to register their products and may provide options for Tanzania in terms of registering some of their GI.

Table 2: GI case studies and their institutional arrangement for their success

Country	Product	Institutional Structure elements
Guatemala	Antigua Coffee	Initiated and run by local producer/ exporter association Antigua Coffee Growers Association and the National Coffee Association GI is established with the Antigua Coffee Producers' Association (APCA) label.
Colombia	coffee	A public non-governmental institution with sufficient dedicated resources manages the GIs for coffee. Uses participatory local decision-making to ensure social inclusion and innovative technology.
Jamaica	Blue Mountain Coffee	• Strong state support • Control is more private sector oriented with the government playing more of a regulatory than commercial role. • Coffee Industry Board (CIB) is both a regulator and a commercial actor within the industry, • CIB produces, buys, and export Blue Mountain Coffee.
Mongolia	Gobi Camel Wool	A country with little GI experience Difficulties in participatory organization have resulted in few stakeholders grasping the rights and obligations of the GI GI Commission is composed of the different actors that comprise the value chain, i.e., representatives of the camel wool producers, association, traders and herders.
India	Darjeeling Tea	• Members of the managing Tea Board are nominated by the Government to take considerable control. • The Tea Board functions as a non-trading body and operates on a not-for-profit basis. • It falls under the jurisdiction of the Ministry of Commerce and Industry. • Structure made of, the Tea Association and Government, Tea Board

SECTION THREE: POTENTIAL GI CASE STUDIES

3.0 Coffee

Coffee is among the products that, once assigned GI, are known to fetch a premium, with consumers placing value on the traceability of the coffee they drink. With a well-established coffee market in most coffee-producing countries, labelling in the coffee market is believed to add value to the coffee products. Teuber, (2010) reported that most coffee labels are still informal, meaning they lack proper legal protection. Formally registered GI labelling has been known to add or redistribute value for most agricultural products, including coffee. In Tanzania, the coffee sector is very aware of the importance of being specific about origin and what different origin products add quality-wise. Coffee is one of the major cash crops in the Tanzanian agricultural economy and is grown by a majority of small-scale producers. The coffee in Tanzania differs from location to location; the northern coffees tend to be pleasant in aroma, rich in acidity and body, with balanced flavours due to the mineral nutrients from volcanic soils that have most buyers' interest. Southern coffees are characterised by a medium body and fine acidity with good fruity and floral aromas. Some of the key areas in Tanzania for growing coffee include:

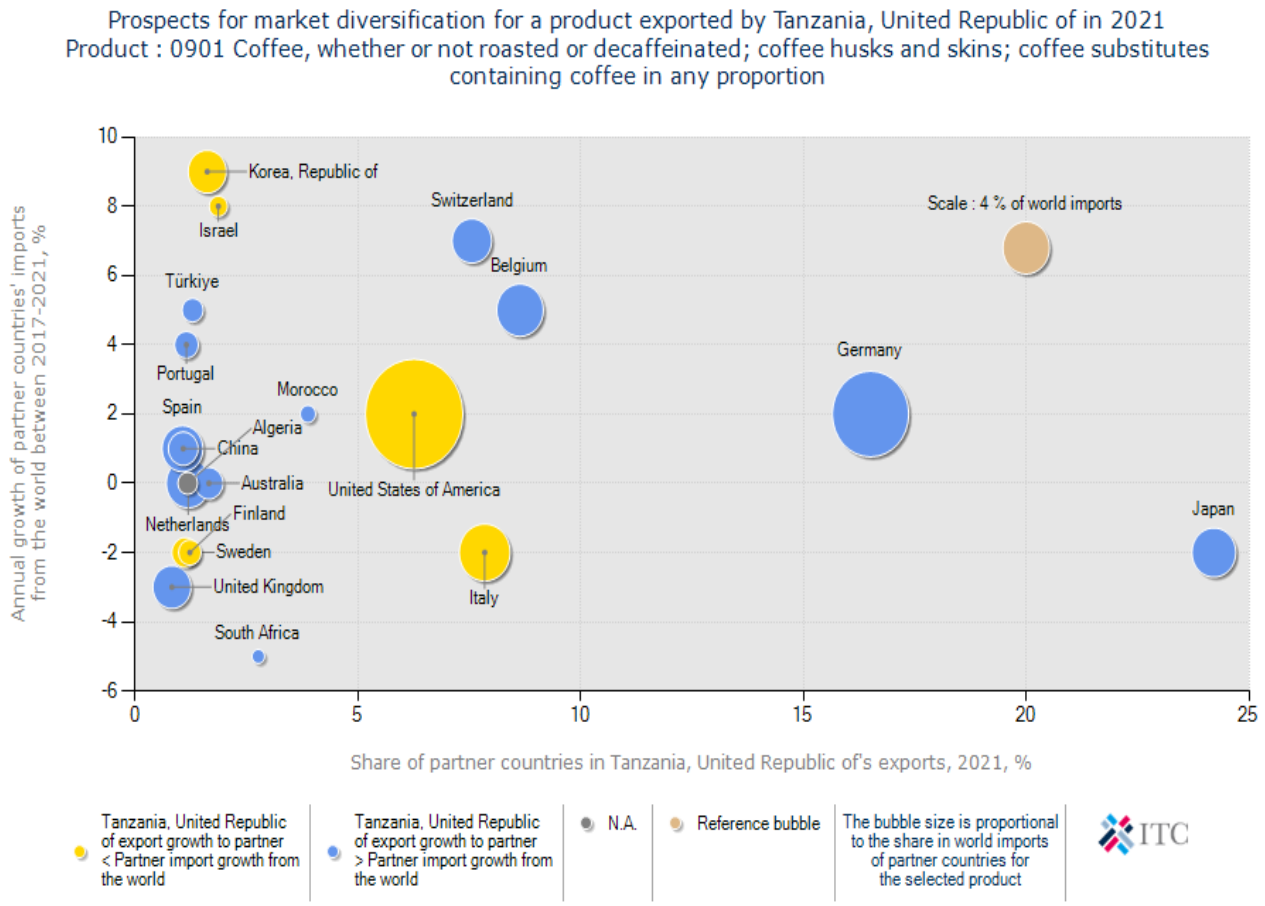
1. West: Kigoma and Mbeya
2. South: Morogoro, Iringa, Njombe, and Mbinga
3. North: Bukoba, Tarime, Oldeani, Arusha, Kilimanjaro, and Usambara.

Tanzania has put in place strategies to improve coffee production, quality and value addition, and access to regional and international markets by enhancing business networks and promoting the uniqueness of Tanzanian coffee worldwide, while improving the marketing system (TCB, 2019). However, not all coffees in Tanzania fit the criteria mentioned in Section 3.1 for GI labelling. For a product to be protected under GI law, it must attain the mentioned criteria. John et al. (2020) established the possibility of having Kilimanjaro coffee protected under GI, which is known for its very high reputation and prices in the coffee market. GI will be able to add value to the already existing coffee industry by labelling their products. The coffee producer may benefit in the GI market by obtaining that extra income from GI labelling, which provides information to consumers. It was established by John I (2022) that consumers pay increasing attention to the quality of the products they consume and demand high-quality products for which they are willing to pay more.

Coffee Market

In Tanzania, coffee is largely exported, with only a small percentage of the produce sold in the local market, where farmers sell at farm gate price to private coffee buyers, farmer groups, and cooperatives. Coffee beans are sold during an auction at the Tanzania Coffee Board (TCB) that is conducted every week on Thursdays during the harvest season (usually 9 months). The TCB allows producers of premium top-grade coffees to bypass the auction by exporting directly. Direct export enables growers to establish long-term relationships with roasters and international traders. Some of the major destination countries for Tanzanian coffee include Italy, Japan, Germany, Belgium, and the United States of America (Figure 4).

Figure 4:



Sources: ITC calculations based on UN COMTRADE statistics.

Tanzanian coffee exports have experienced an upward increase for the last five years with minor disruption during the year 2020 which might be due to the impact of COVID-19. It accounts for an export value of USD 172 million in the year 2021, the top five destination markets being Japan, German, Belgium, Italy and Switzerland (ITC Trade map, 2022). Coffee sales in Tanzania have increased over time as a result of increased consumer and market awareness of coffee quality. For example, Colombian and Jamaican coffees that are protected through the Certification Mark (CM) and Trademark (TM) systems in the US have a significant impact on the market (Table 3). Furthermore, coffee from Ethiopia, specifically Sidamo and Yirgacheffe coffee, has seen significant price increases as a result of the place of origin factor.

Table 3**: Various origin coffees and GI registration/ potential status**

Coffee/country	Attributes	Certification
Colombia Coffee	In the mouth, it combines animal aromas with a particularly fresh flavour.	Certification Mark (CM)
Ethiopian coffee	Shape and organoleptic qualities	No GI certification
Ziama Mount in Guinea Forest	tart and slightly bitter taste, high aromatic intensity, and a persistent aroma; strong and fine. These characteristics relate to the soil and microclimate around Ziama Mount in Guinea Forest.	GI certified in 2014
Kilimanjaro Coffee-Tanzania	aroma, richness in acidity, and a pleasant, sweet-bitter taste. The volcanic soil is perceived as the most important source influencing quality, followed by the climatic conditions, linked to the water flowing from Mt. Kilimanjaro.	No GI certification,
Coffee Robusta Temanggung, Indonesia	Physical characteristics, taste, cultivation techniques, as well as its harvesting and processing methods	GI certified in 2016
Kintamani Bali Arabica Coffee, Indonesia	Unique taste	GI certified in 2008
Kenyan Coffee	Rich floral flavour, acidic and sharp.	There is no GI certification, but there is a bill on GI.
Burundi Coffee	full body, bright acidity, and sweet flavour	In the process of registration

GI certification has significantly contributed to the marketing of coffee in different countries by providing important information about product characteristics and specificity related to origin-linked products. The greatest constraint for coffee trade production would lie more in the already existing international marketing channels. Consumers already pay premium prices for the uniqueness of the products hence increasing the prices further may not be feasible but expanding the trade base which can provide more channels for producers to sell their products (Maina, 2018). Tanzania has a chance to protect its specialty coffee through GI, which not only increases the nation's income but also adds a premium to the producers, resulting in a welfare impact. To establish the potential in Tanzania, there needs to be an identification of high-quality coffee linked to the area where it is produced (as in the Kilimanjaro case).

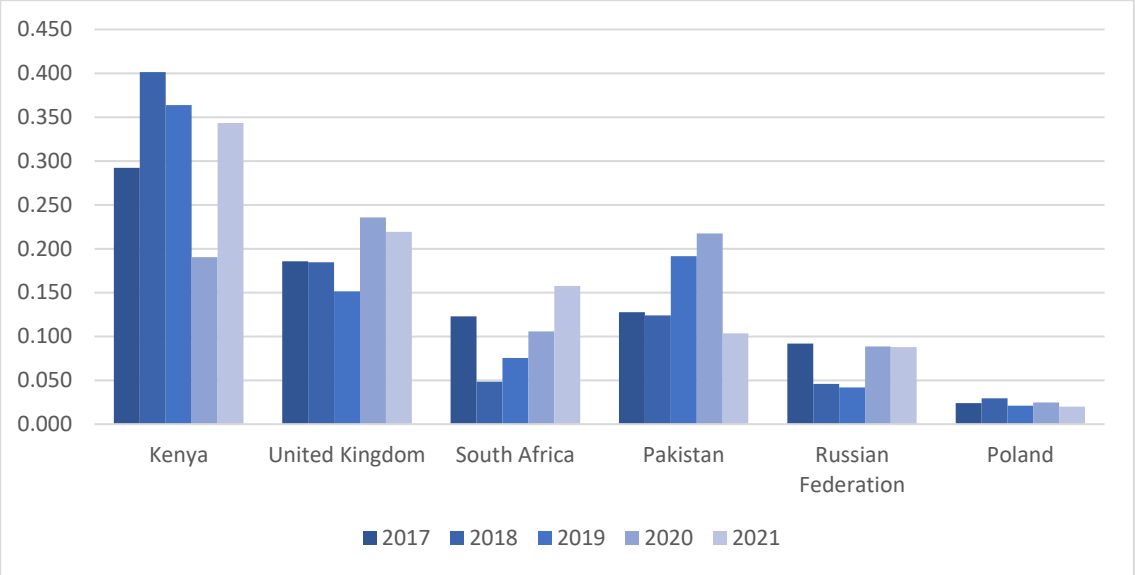
3.1. Tea

Tea was first planted in Tanzania in 1902 when German settlers introduced the crop to the Agricultural Research Station in Amani and Rungwe (Baffes, 2004). In the 2019/2020 National Sample Census of Agriculture, a total of 18,661 households were engaged in growing tea on Mainland Tanzania, with none from Zanzibar. Tea is grown on a total of 23,805.55 ha[6] in six regions: Tanga, Mbeya, Iringa, Morogoro Kagera, and Njombe (URT, 2021) and operated by 22 privately owned factories (ITC, 2017). Most of the Tanzanian tea is exported. In 2021 the major importers of Tanzanian tea include

[6] Source: Tanzania Smallholders Tea Development Agency (TSHTDA)

the United Kingdom, South Africa and Kenya (Figure 5). Smaller importers include the Russia, Pakistan, Egypt, Poland, India and United States, Germany, and Argentina. The country has 22 privately owned factories country

Figure 5: List of importing markets for Tea exported by Tanzania



Source: ITC calculations based on UN COMTRADE statistics.

Tanzanian tea has a reputation worldwide for its unique characteristics, which are a result of, among other things, the geographical conditions. It is known for its floral qualities, which are ideal for infusing and blending with other species such as cinnamon, cloves, ginger, and cardamom. Based on the reputation of tea, exported bulks of tea are sometimes blended with cheaper variations of tea that are then sold as Tanzanian tea under other trademarks without differentiating the geographical origin (Baffes, 2004).

Since 2014, with its GI certification, South Africa has been able to protect and expand its trade market with its well-known Rooibos tea. Tea is known to be naturally caffeine-free, with lower tannin levels, rich in antioxidants, a sweet aroma, and celebrated medicinal qualities (Table 4). The tea has been widely exported, especially to the European market. Similarly, Kenyan tea from Kirinyaga County has been identified as a potential GI. Tea in Kenya is among the most valuable of all export crops; production, processing, and marketing are managed by the Kenya Tea Development Agency (KTDA) (Maina, 2018). The growing global interest in Kenyan tea and other teas is due to long periods of reputation building and consumer demand.

Table 4: Potential and registered GI tea

Tea - country	Attributes	Certification
Kenya tea	Taste, uniqueness, and high-quality reputation	Since 2002, no GI certification has been subject to trademark law.
Burundi tea	100% organic, 100% handpicked, red-brown colour, liquor and aromatic taste, and excellent aroma.	Registration is in process; no Gi certification yet.
Rooibos tea, South Africa	Naturally caffeine-free, lower tannin levels, rich antioxidant content, sweet aroma, and celebrated medicinal qualities	GI certified in 2014
Honeybush tea, South Africa	trifoliate leaves, single-flowered inflorescences, and sweetly scented, bright yellow flowers.	No GI certification
Ceylon tea, Sir Lanka	quality, flavour and reputation	GI certified in 2003
Darjeeling tea, India	quality, flavour and reputation	GI certified in 1999
Matcha-Powdered green tea, Japan	healthy and a preventative measure against cardiovascular disease, high cholesterol, and high blood pressure.	GI certified in 2017
Boseong' green tea, South Korea	distinctive smell and taste	GI certified in 2002
Mengshan tea, China	a yellow-green appearance and a unique smell	GI certified in 2002

3.2 Spices

The main spices are clove, pepper, chilies, cinnamon, cardamom, ginger, coriander, vanilla, garlic, lemongrass, and red onion, which are sold in local and international markets, all of which old a huge of geographical indication. Spices is found on Tanzania's mainland in Tanga, Morogoro, Mbeya, Kilimanjaro, Kigoma, Ruvuma, Kagera, Iringa, Arusha, Coast, and the Singida region, as well as on the islands of Zanzibar and Pemba. Spices are mainly supported by the Tanzania Spices Association (TASPA) and the Tanzania Horticulture Association (TAHA), which trains farmers on the global GAP standards and links them to markets.

In order to maintain quality and promote the spice market, Tanzania's government launched the *spice label*[7] through TanTrade in 2022, with the private sector represented by TASPA and ITC within the framework of the EU-EAC MARKUP Project, with the goal of promoting the spice market by attracting buyers and consumers worldwide. Registered farmers working with the label receive support for adhering to standards set by the Tanzania Bureau of Standards (TBS), the International Standards Organization (ISO), as well as production standards such as Good Agricultural Practices (GAP).

[7] https://www.eacmarkup.org/news/country-updates/launch-of-the-tanzania-spices-label

clove is the leading exported species which is commonly grown in both mainland Tanzania and Zanzibar by small-scale farmers. In Tanzania cloves are grown in Morogoro and Tanga. It's the largest exported crop in Zanzibar, with the main export markets being Indonesia, India, Singapore, Japan, and South Korea (please see Appendix 3). Cloves from Zanzibar are famous for their unique attributes, which make them fetch a higher price in the export market. According to John (2017), Zanzibar cloves have a distinctive aroma, flavour, bittersweet taste, brownish-reddish colour, distinctive size, slenderness, and low oil content. The unique features have made cloves from Zanzibar a major export crop, contributing more than 70 percent of the country's gross domestic product (GDP). Unlike mainland Tanzania, Zanzibar kept the Industrial Act of 2008 in place to guide its crops: spices, cloves, and seaweed. The Industrial Act of 2001 was amended in 2006 to include geographic indication in Articles 55–60 and Section V of Article 104. The Act defined and explained the ground rule for registering GIs and the grounds for refusal of such registration.

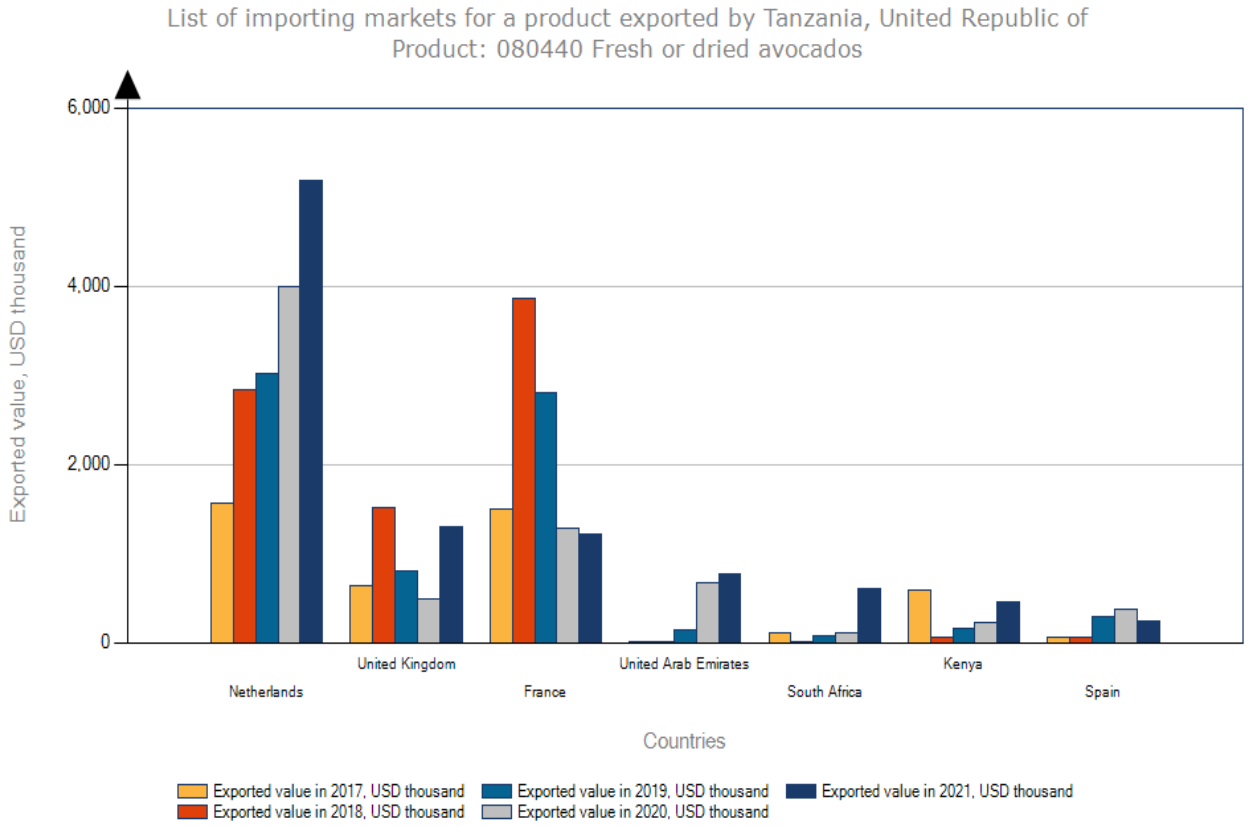
3.3 Avocado

Avocado is regarded as a potential GI crop grown in the regions of Mbeya, Njombe, Songwe, and Iringa in the north-western region; Kilimanjaro, Arusha, and Tanga in the northeast; and others such as Kigoma, Kagera, and Morogoro elsewhere. Tanzania is estimated to be the third largest avocado producer in Africa after South Africa and Kenya (EU, 2020). Avocados from Tanzania, especially those grown in Njombe and Iringa, are known for their unique quality linked to the type of soils and high altitudes with relatively warm weather that favour the cropping conditions. About 50 percent of Avocados produced are of Fuerte type, followed by Hass which is produced by 30 percent (TANTRADE, 2021). The crop is fairly new in the export market with exports starting in 2009. It thrives in the subtropical climates, and in areas suitable for coffee and tea (Tanzania's traditional crops), making Tanzania an ideal location for avocado growth. The There is an increased number of households growing avocado (Appendix 4) in Tanzania which has been attributed by the increased potential in the export market.

Tanzanian avocado holds GI potential linked to its increased reputation in the export market. According to ITC data, crop exports have increased sharply from 2015 to 2021 (in 2021, exports were valued at USD 10,923 thousand), which signals a quality worth

exploring due to the growth in exported value and quantity of 18 and 24 percent, respectively, between 2017 and 202 (ITC, 2021). The main importing countries are the Netherlands, France, South Africa, Kenya and the UK (Table 5). Other countries growing avocado include Kenya, Chile, Mexico, South Africa, Morocco, Peru, and Colombia, all of which have a good reputation and quality in the global market.

Figure 6: Countries importing Avocado from Tanzania 2017 to 2021 (exported value in USD thousand).



Source: ITC calculations based on UN COMTRADE statistics.

SECTION FIVE

5.1 Conclusion

The value chains of coffee, cloves, avocados, and tea are not limited to national borders, as evidenced by the recent study on geographical indications (GIs). This study revealed the potential of developing GIs across the sector, with the presence of competent government authorities such as standards bodies and intellectual property institutions playing a vital role in institutionalizing GIs in Tanzania. Producers of these products acknowledge the impact of territorial specificities on the uniqueness of their products and recognize the importance of preserving these geographical characteristics. However, the heterogeneity among producers requires a targeted approach, with clustering efforts necessary to effectively reach different producer groups. Conducting product-specific analysis is crucial in identifying the potential for registering different products as GIs. To build a shared vision among producers and align expectations, it is important to implement enhanced collective action, particularly in the avocado production region, to maintain the collective reputation of the products and their social characteristics. The case for geographical indications has never been stronger and now is the time to act.

An analysis of institutional incentives around coffee and tea as potential GIs pointed to the opportunities that exist for each of the products since they all have reputation, specificity, and typicity based on the region of production. However, the weak bargaining power of the producers in the supply chain and the fact that most of the buyers are international require active regulatory framework for successful GI protection, involving all actors and maintaining relationships.

The four products discussed here, exhibits unique *terroir* -based qualities based on perceptions of producers from previous studies and literature review. Tanzania (mainland and Zanzibar) has the potential to market its agricultural and non-agricultural products using geographic indications (GI) by recognising territory-specific cultural, environmental, and social origin product qualities. The key potential products identified i.e. avocado, coffee, spices and tea have prospects for GI registration with Tanzania to advance the exports of geographically indicated products, as well as in domestic markets. Price premiums on origin products registered with a GI may allow smallholders to create further employment and build further monetary value while preserving local food cultures and natural environments and increasing the diversity of natural and unique quality products. Several Tanzanian-origin products have GI protection potential. Tanzania may potentially gain by using GIs to market even some of its larger crops, such as bananas and cashew nuts, as well as new, non-traditional crops such as spices and oilseeds. Tanzania also has the option of using a GI approach for its handcrafts and products made in specific regions, especially those made around the safari destination areas. This marketing tool is used in South Africa for SA wines, where tourists get to visit the sites of manufacture as well as buy products such as "rooibos tea." GIs could be used as economic agricultural policy instruments for the Tanzanian regional association of producers to protect products and enable alliances of farmers of such products to earn a higher price for their products and thus more income to sustain their lives.

5.2 Recommendations

The GI potential of a product cannot be identified using any single indicator alone. A combination of attributes is required, as it helps identify different aspects that would require attention in developing the potential GI. With reputation and uniqueness building in the markets and among producers, factors including collective action, the existence of macro-institutional recognition, and support need to be in place to develop GIs. The fact that all crops on the Tanzanian mainland and in Zanzibar are governed by directorates under the Ministry of Agriculture and the Ministry of Trade and Industry presents a significant opportunity. The directorates need to work together to provide sub-sector-specific guidelines and regulations for GIs.

The role of state policies and regulations is important, as are the inter-relationships among various actors in the value chain including producer associations, extension offices and regulatory bodies just to mention a few. The various commodity regulatory body would benefit producers by working together to develop the guidelines and also by supporting the process of having the draft GI Bill enacted through advocacy activities. However, due to the collective nature of GIs, all activities should be done in a participatory process with the producers as much as possible since they are also the custodians of the environment in which the unique products are produced.

As a starting point, having law and regulations that would essentially provide codes of practise for each subsector is important before the GI Bill is in place. Collective action should be stressed to producers, as those in the spices and avocado sub-sector have been unsuccessful, particularly in terms of marketing.

The next step in fully establishing the potential of GI products in Tanzania is the need for in-depth investigation to clearly identify high-quality products whose attributes are linked to the area of production. The delay of establishing GI products in Tanzania has hindered the chance to explore all potential products in the country, indicating the need for further research to study more products and their uniqueness. The report has provided the basics of what needs to be done for GIs to be feasible in the country, but further research should be emphasised such that:

- The legal-economic approach to GI protection, consumer and trader perceptions of GI, and marketing of GI would examine the entire value chain and expand the scale of production for export markets for different crops. Such research is important in the WTO context in order to defend the specific quality of a potential origin product against allegations of the creation of trade barriers.
- A detailed analysis of the actual link between products and their place of origin requires a multidisciplinary team. This would also provide an indication of how much revenue is likely to accrue to the country from GI protection.

- A rural development study will be conducted to determine how these GI will benefit local producers.
- With GIs gaining popularity in the global market, a study on the impact of GIs in protecting the environment and biodiversity needs to be conducted to demonstrate how GIs may have both economic and environmental impacts on the economy.

The success of GI in Tanzania necessitates a variety of initiatives, particularly in the institutional and legal framework, that can promote trade benefits, growth, and the export competitiveness of producers and actors/players in the value chain for various potential GI products. There is a huge need to brand Tanzanian products to capture value in the international market, which is in line with providing information (GI information) on product attributes.

References

AGRA. (2019). *Agricultural policy reforms in Tanzania*. (November), 42.

AU. (2017). *Continental Strategy for Geographical Indications in Africa 2018-2023*.

Babcock, B. A., & Clemens, R. L. (2004). Geographical indications and property rights: protecting value-added agricultural products. In *MATRIC Briefing Paper* (Vol. 2004). Retrieved from http://www.card.iastate.edu/publications/dbs/pdffiles/04mbp7.pdf

Baffes, J. (2004). Tanzania's Tea Sector Constraints and Challenges. In *Environment and Development in Africa*. https://doi.org/10.1016/b978-0-08-025667-2.50008-6

Chabrol, D., Mariani, M., & Sautier, D. (2017). Establishing Geographical Indications without State Involvement? Learning from Case Studies in Central and West Africa. *World Development*, *98*, 68–81. https://doi.org/10.1016/j.worlddev.2015.11.023

Charbonneau, J. (2011). Creating value through Geographical Labelling and Indications: the power of origin. In Workshop Proceeding. Kampala. In *ITC report*.

De Filippis, F., Giua, M., Salvatici, L., & Vaquero-Piñeiro, C. (2022). The international trade impacts of Geographical Indications: Hype or hope? *Food Policy*, *112*(February). https://doi.org/10.1016/j.foodpol.2022.102371

Egelyng, H., Bosselmann, A. S., Warui, M., Maina, F., Mburu, J., & Gyau, A. (2017). Origin products from African forests: A Kenyan pathway to prosperity and green inclusive growth? *Forest Policy and Economics*, *84*, 38–46. https://doi.org/10.1016/j.forpol.2016.09.001

EU. (2020). *Avocado Catalogue 2020 Avocado Catalogue 2020*.

European Commission. (2012). *Value of production of agricultural products and foodstuffs , wines , aromatised wines and spirits protected by a geographical indication (GI)*.

FAO. (2010). *Linking people , places and products*.

Ferrante, M. (2021). *Food for thought : the EU – China Agreement on GIs Protection under the China Trademark Law*. *16*(4), 2019–2021.

Giovannucci, D. (2008). *Case Lessons in Geographical Indications Case Lessons in Case Lessons in Geographical Indications Geographical Indications Agenda Agenda*. Retrieved from http://www.origin-food.org/2005/upload/Giovannucci FAO Roma Geo Indications Jan 08 .pdf

Giovannucci, D., Josling, T., Kerr, W., O'Connor, B., & Yeung, M. T. (2009). *Guide to Geographical indications: linking products and their origins*. Retrieved from http://www.intracen.org/publications/Free-publications/Geographical_Indications.pdf

ITC. (2017). *Tea Demand analysis for East Africa*.

ITC. (2018). *Market Profile: Tanzania's pepper export to the united states of America*.

John, I. (2017). The Potential of Marketing Zanzibar Cloves with Geographical Indication Labelling. *African Journal of Intellectual Property*, *2*(1), 71–86.

John, I. (2022). Consumer Perceptions, Preferences and Awareness Towards Potential Geographical Indication of Products in Tanzania. *Tanzanian Economic Review*, *12*(2), 43–56.

John, I., Egelyng, H., & Lokina, R. (2016). Tanzanian food origins and protected geographical indications. *Future of Food: Journal on Food, Agriculture and Society*, *4*(2), 6–12.

John, I., Lokina, R. and, & Egelyng, H. (2020). Small-Scale Producers of Quality Products with Potential of Geographical Indication Protection in Tanzania. *International Journal of Food and Agricultural Economics*, *8*(2), 193–205.

Kibugi, R., Wardell, D. A., Segger, M. C. C., & Haywood, C. (2015). Enabling legal frameworks for sustainable land-use investments in Tanzania. In *Center for International Forestry Research*. Retrieved from https://www.idlo.int/sites/default/files/pdfs/publications/Enabling legal frameworks for sustainable land-use investments in Tanzania- Legal assessment report.pdf

Maina, F. W. (2018). *Producer Perceptions , Economic Value and Incentives for Promotion of Potential Geographical Indications in Kenya a Thesis Submitted in Fulfillment of the Requirements for the Award of the Degree of Doctor of Philosophy in Agricultural and Applied Economi*.

Mhando, L. (2014). *International Business Law Workshop Protection and Licensing Of Intelectual Property Rights.*

Mwakaje, S. (2021). *Protection of geographical indications and cross-border trade: A survey of legal and regulatory frameworks in East Africa*.

Ndembeka, E. . (2013). *Legal Challenges In Protecting Geographical Indications For Enhancing Agricultural Competitiveness In Tanzania : A Case Study Of Kyela-Rice*. 79. Retrieved from http://scholar.mzumbe.ac.tz/bitstream/handle/11192/409/LLM-Dissertation-Ndembeka, Emanuel Gideon-2013.pdf?sequence=1

North, D. (1990). Institutions, Institutional Change, and Economic Performance. *NewYork: Cambridge University Press.*

OAPI. (1999). *Agreement Revising the Bangui Agreement of March 2 , 1977 , on the Creation of an African Intellectual Property Organization*.

Raimondi, V., Falco, C., Curzi, D., & Olper, A. (2020). Trade effects of geographical indication policy: The EU case. *Journal of Agricultural Economics*, *71*(2), 330–356. https://doi.org/10.1111/1477-9552.12349

Santeramo, F. G., & Lamonaca, E. (2020). Evaluation of geographical label in consumers' decision-making process: A systematic review and meta-analysis. *Food Research International*, *131*(August 2019), 108995. https://doi.org/10.1016/j.foodres.2020.108995

Sengo, E. A. (2017). *Protection of Geographical Indications in Tanzania Mainland-Challenges and Future Perspectives*. (September). Retrieved from http://www.lawanddevelopment.net/img/2017papers/E.Sengo.pdf

TANTRADE. (2021). *Tanzania Avocado Profile*.

TCB. (2019). *Status of the Coffee Industry in Tanzania. The Tenth General Meeting of Coffee Stakeholders*.

TCB. (2021). *Tanzania Coffee Industry Development Strategy of 2021 - 2025*. Retrieved from https://www.ptonline.com/articles/how-to-get-better-mfi-results

Teuber, R. (2010). Geographical indications of origin as a tool of product differentiation: The case of coffee. *Journal of International Food and Agribusiness Marketing*, *22*(3), 277–298. https://doi.org/10.1080/08974431003641612

URT. (2021). *National Sample Census of Agriculture 2019/20*.

Appendices

Appendix 1: Example of registered and potential GI case studies

s/n	Product	Country	Status
1.	• DATTE deglet nour de Tolga • FIGUE sèche de Beni Maouche • OLIVE de Sig	Algeria	Registration in progress
2.	• Miel blanc d'Oku • Poivre blanc de Penja • Igname de MBE • Oignon de Maroua • Cacao de Ntonga • Cacao de Nkonjock • Cacao de Nyanon • cacao de Mbangassina • Cafe de Santchou • café de Boyo • Avocat de Mbouda • Ananas de Bafia • Riz de Nsonmessok	Cameroon	Miel blanc d'Oku and Poivre blanc de Penja are registered Other products not registered
3.	• pagne Baoulé • toile de Korhogo • poterie de Katiola • mangue des savanes • riz des montagnes • café des montagnes • cacao de Taabo • noix de cola de Sikensi • café d'Aboisso • noix de cajou de Bondoukou • piment de Bénéné • igname kponan • huile de palme de l'ouest montagneux • attiéké de Grand Lahou • Attiéké de Dabou • Attiéké de Jacqueville • Attiéké de Ebrié • Attiéké Agbodjama	Côte d'Ivoire	Khorogho Canvas Collective mark registered The pagne Baoule registration is ongoing. 4 products, poterie de Katiola,mangue des savanes, riz des montagnes, café des montagnes, are characterized and ready to enter the registration process.

	• pagne traditionnel Gouro • maïs violet de Katiola • riz de Gagnoa • miel de Katiola • fruit noirs du Faisantier de Katiola • fruit de Thomacoccus danieli de Côte d'Ivoire		
4.	• Sidamo Yigacheffe Harrar Limu Jimma Lekempt Ghimbi	Ethiopia	All coffees; Sidamo, Yigacheffe, Harrar registered as trade marks in main markets (EU, US, Jpn). No IPR protection in Ethiopia. 1994 FDRE constitution on Art. 5/877.
5.	• Ghana Cocoa • Ghana Fine Flavour Cocoa • Kente Cloth (Bonweri &Kpetoe) • shea butter • Pona Yam • Sugar loaf Pineapple (Central region) • Zomi(Palm Oil) • Brown rice • Adinkra cloth(Ashanti) • Bolga baskets • Northern Smock • Agomenya Beads	Ghana	No registration
6.	• Ananas Maférinyah • Café du Mont Ziama • Pomme de Terre Belle de Guinée • Riz Bora Malé • Poisson blanc (otolithes) de la baie de Kamsar • Miel jaune de Djaguissa • Bonnet "POUTO de l'artisanat du Fouta • Petit piment de Benna	Guinea	Café du Mont Ziama is Registered Riz Bora Malé is registered Other products not registered
7.	• Kenya Tea Mount Kenya • Coffee from Kenya • Roses Kenya • Masai coffee • Wild silk • Kisii Soapstone • Honey	Kenya	No registration but has a bill for GI protection

8.	• Kilichi du Niger (viande séchée) • Violet de Galmi • Peau de la chèvre rousse de Maradi • Poivron de Diffa • Fromage de Toukounous, Tchintabaraden, Maïné Soroa • Sésame de Téssaoua • Aïl blanc et Pomme de terre de Tabelot • Sel de Fogha	Niger	Violet de Galmi is registered as a collective mark
9.	• Rwanda Mountain Coffee • Rwandan Tea	Rwanda	No registration
10	• Rooibos herbal tea • Heuningbos Kalahari Melon Seed (KMS) • Oil Klein Karoo Ostrich • South African Olive Oil • Boland Waterblommetjies (The stems, leaves and • flowers of Aponogeton distachyos) • Wine of Origin	South Africa	South African wines are registered as geographical indicationsunder the Liquor Products Act (Act 60 of 1989) Rooibos tea is registered as a certification mark Rooibos and Heuningbos KSM has been protected as a GI in South Africa under the Merchandise Marks Act (Act 17 of 1941) “Karoo Certified Meat of Origin” is protected as a mark under Trademark laws.
11	• Zanzibar Cloves • Aloe Vera • Rice • Coffee • Masai cloth • Dodoma wine • Avocado • Tea • Bamboo wine •	Tanzania	No registration
12	• Bark-cloth textiles of central Uganda • West Nile district cotton	Uganda	No registration

	• West Nile district sesame • West Nile Honey • White Perch • Vanilla beans ("Mukono vanilla") • Pineapple Apple • Banana • Goose berry • Matooke (green banana) • Honey from Luwero triangle • Mount Elgon coffee		
13	• Kivu Coffee	Burundi	No registration

Source: AU, (2017)

Appendix 2: Difference between Trademarks and Geographical Indications.

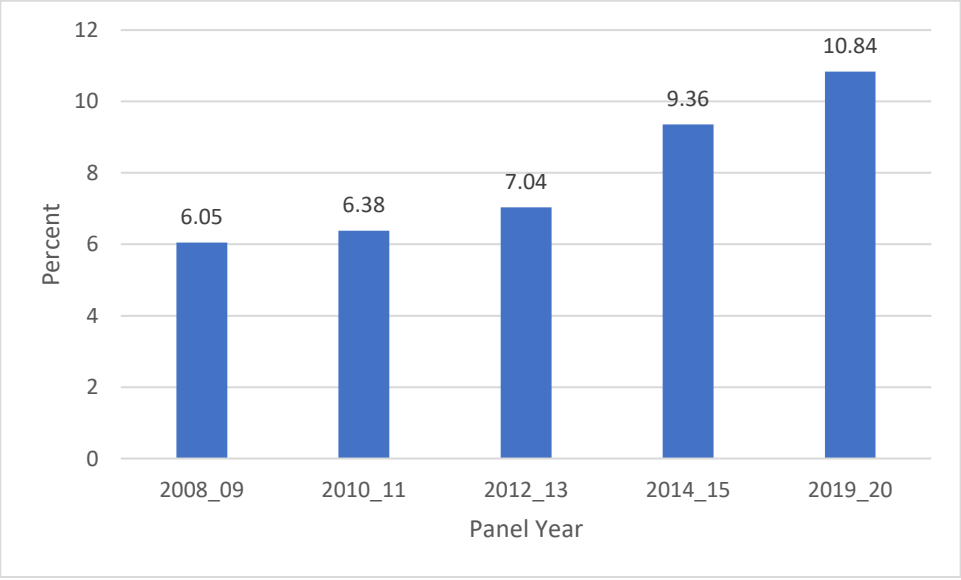
	Trademark	**Geographical Indication**
	MAY certify the product's origin. Trademarks cannot be descriptive or mislead the public about the origin of a product.	MUST certify the origin of the product.
Name, sign	May be created, non-geographic, fancy, new, distinctive	Shall exist Mostly geographical determined by terroir
Quality	Usually not linked to specifications	Obligatorily linked to its origin **and** laid down in specifications
Ownership	TM owner is an individual, sometimes collective [Individual control]	Collective control of the producers plus external public or private bodies to ensure that the products comply with the specifications [Producers – public]
Rights	First in time, first in rights	Registration gives rights to **all** producers
Use	TMs are mostly private and closed. Collective TMs; closed rules TM certification; open rules	Mostly collective Open to all producers that comply with the product specifications
Duration	Protection must be renewed periodically. For example, in the EU, trademarks must be renewed every 10 years. [Limited]	Often, protection is granted as long as the GI exists. For example, in the EU, GI protection is not limited in time; there is no need to renew the protection. [Permanent]
Protection	Private (burden of proof on owner)	Public
Production	Production is rooted in the region; it cannot be delocalized to another area or country.	Production is not attached to a specific place; products can be made anywhere.

Appendix 3: List of importing markets for cloves exported by Tanzania

Importers	2017	2018	2019	2020	2021
Singapore	736	-	2,649	3,061	42,360
India	6,992	40	5,910	13,074	8,021
United Arab Emirates	18	-	-	-	690
Germany	-	-	3	32	181
Egypt	10	130	-	-	169
Yemen	4	4	-	-	137
Italy	-	-	-	46	83
Kenya	-	-	27	-	40
China	-	-	-	-	34
Libya, State of	-	4	-	-	22
United States of America	-	-	-	2	20
Türkiye	-	-	-	-	16
Netherlands	110	100	195	9	4

Source: ITC calculations based on UN COMTRADE statistics.

Appendix 4: households growing avocado in Tanzania



Sources: wave 1,2,3,4, and 5 National Panel Surveys.