

Combi-
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programme

HORTICULTURAL SECTOR STAKEHOLDER MAPPING IN GHANA

A Comprehensive Mapping of Actors, Institutions and
Labour market dynamics in Ghana's Horticultural sector

Mondiaal **FNV**

Photography cover: Jan Banning



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LIST OF ACRONYMS

| | | | |
|---------|------------------------------------------------------------|---------|--------------------------------------------------------|
| AFCFTA | African Continental Free Trade Area | IEC | International Electrotechnical Commission |
| ACDI | African Climate and Development Initiative | IFAD | International Fund for Agricultural Development |
| AFD | Agence Française de Développement | IITA | International Institute of Tropical Agriculture |
| ApFOG | Apex Farmers Organisation in Ghana | ILO | International Labour Organisation |
| BUSAC | Business Sector Advocacy Challenge | ISO | International Organization for Standardization |
| BTI | Bertelsmann Transformation Index | ISTA | International Seed Testing Association |
| CEN | The European Committee for Standardization | LEAP | Livelihood Empowerment Against Poverty |
| CB | Collective bargaining | MAP | Monoammonium phosphate |
| CBA | Collective bargaining agreements | MKMFA | Manya Krobo Mango Farmers Association |
| CRI | Crop Research Institute | MiDA | Millenium Development Authority |
| CSIR | Council for Scientific and Industrial Research | MOP | Muriate of Potash |
| CSZ | coastal savannah zone | MoFA | Ministry of Food and Agriculture |
| DWMFA | Dangme West Mango Farmers Association | MoFAD | Ministry of Fisheries and Aquaculture Development |
| EPA | Environmental Protection Agency | NDC | National Democratic Congress |
| EPZ | Export Processing Zone | NIB | National Investment Bank |
| EWS-KT | East-West Seed Knowledge Transfer | NPP | New Patriotic Party |
| EU | European Union | NTE | Non-traditional exports |
| FAO | Food and Agriculture Organisation | OOMA | Okro Outgrowers and Marketing Association |
| FARA | Forum for Agricultural Research in Africa | OSHE | Occupational Health, Safety and Environment |
| FAGE | Federation of Associations of Ghanaian Exporters | PEF | Private Enterprise Foundation |
| FDA | Food and Drugs Authority | PHL | Postharvest loss |
| FONG | Farmers Organisation Network in Ghana | PFAG | Peasant Farmers Association of Ghana |
| FPMAG | Fruit Processors and Marketers Association of Ghana | PFJ | Planting for Food and Jobs |
| FRI | Food Research Institute | PPEs | Personal protective equipment |
| FTSZ | Forest Transition Savannah Zone | SDC | Swiss Development and Cooperation Agency |
| GAIN | Ghana Angel Investment Network | SPEG | Sea-Freight Pineapple Exporters of Ghana |
| GEA | Ghana Employers Association | TSP | Triple superphosphate |
| GAVEX | Ghana Association of Vegetable Exporters | TCDA | Tree crop Development Authority |
| GAWU | Ghana Agriculture Workers Union | UAE | United Arab Emirates |
| GEL | Golden Exotics Ltd | UG | University of Ghana |
| GEPA | Ghana Export Promotion Authority | UNEAGES | Agriculture and General Services |
| GFL | Ghana Federation of Labour | UNIWA | Union of Informal Workers Associations |
| GLSS | Ghana Living Standards Survey | USAID | United States Agency for International Development |
| GNAFF | Ghana National Association of Farmers and Fishermen | UK | United Kingdom |
| GNTTTA | Ghana National Tomato Traders and Transporters Association | VEPEAG | Vegetable Producers and Exporters Association of Ghana |
| GQSP | Global Quality and Standards Programme | VREL | Volta River Estate Limited |
| GROCTEU | Ghana Root Crops and Tubers Exporters Union | VVCCU | Volta Value Chain Committee Union |
| GSA | Ghana Standards Authority | WIAD | Women in Agricultural Development |
| GSID | Ghana Seed Inspection Division | WRF | World Rural Forum |
| GSZ | Guinea Savannah Zone | YKMFA | Yilo Krobo Mango Farmers Association |
| HACCP | Hazard Analysis Critical Control Points | | |
| ICU | Industrial and Commercial Workers Union | | |

CHAPTER 1: GEOGRAPHICAL AND DEMOGRAPHIC INFORMATION

Ghana is a country located in the Western part of Africa and has a total landmass of about 238,533 square kilometres (92,100 square miles). The country is bordered on its north by Burkina Faso, on the south by the Gulf of Guinea, on the east by the Togo and on the west by La Côte D'Ivoire. Agriculture, is an important sector in Ghana's economy, reflecting the country's geographical features. Large aspects of the country's horticulture sector depends on waters that flow through rivers from northern Burkina Faso, Togo and Ivory Coast. Mineral resources such as gold, industrial diamonds, bauxite, and manganese, have played significant roles in the development of the country. Since 2010, production of oil and gas in commercial quantities has generated additional revenues to the state. Latest estimates however suggest that revenues from the oil and gas sector remains rather modest and short-lived and has not had a major distorting effect on the Ghanaian economy. The reliance on export of primary commodities such as unprocessed minerals, raw agricultural products, and crude oil, together contributing over 80.0 percent of the country's total exports, makes Ghana susceptible to external shocks.¹ International prices for gold, cocoa and oil have been volatile in the past years and the overdependence on these primary commodities has negatively impacted Ghana's economy.²

1.1 POLITICAL AND GOVERNANCE INDICATORS IN GHANA

According to the 2021 Population and Housing census figures, Ghana's population is estimated at 30.8 million representing an increase of about 23% over the population in 2010.³ This indicates an annual population growth of 2.1%. About 35% of the population are below 15 years, 38% within the 15-35 years age cohort while 4.3% are 65 years or older. The working-age population defined to include all persons aged between 15 and 64 years constitute an estimated 63% the population in 2021, with majority being female, which has importance for the agriculture and the burgeoning horticulture sector in particular.⁴ Over a third (36%) of the 31 million Ghanaians are believed to



be active in the agriculture sector (GSS 2019). Available data shows that over a million Ghanaians operate in the horticulture sector, majority of which are located in the Eastern, Greater Accra, Central and Volta regions of Ghana.⁵

Ghana remains one of West Africa's most resilient democracies, experiencing eight consecutive elections without slipping into nationwide violence, and has been held up as a model of stability and good governance. Since 2001, there have been three peaceful transfers of power between Ghana's two dominant political parties, the current ruling New Patriotic Party (NPP) and the National Democratic Congress (NDC) - the main opposition party. The country's independent judiciary, vibrant civil society, and other state institutions all play important roles in maintaining the stability of its democratic system by upholding fundamental human rights and freedoms and the rule of law which is a prerequisite for effective state-business relations, leading to the increasing numbers of horticulture sector companies over the past three decades.⁶ In addition, Ghana remains a top performer on various

¹ GSS, 2023. Trade Vulnerability Report, Ghana

² <https://statsghana.gov.gh/gssmain/fileUpload/pressrelease/Trade%20vulnerability%20report%20-%20Final%20version%2012-08-2023.pdf>

³ 2021 Population and Housing Census recorded total population of Ghana was 30,792,608 made up of 15,610,149 females.

and 15,182,459 males. <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=GH>

⁴ LFS REPORT_fian_21-3-17.pdf (statsghana.gov.gh)

⁵ <https://www.gepghana.org/ghanas-horticultural-catalogue/#:~:text=The%20sector%20currently%20provides%20employment,the%20formal%20and%20informal%20sectors>

⁶ Interview with GEPA officials; Interview with GAWU General Secretary

governance rankings in Africa. In the most recent Mo Ibrahim Index on African Governance, Ghana ranked first in freedom of association and assembly, third in personal liberties, fourth in accountability and transparency, and seventh in overall governance.⁷ This spectre of political stability has provided a semblance of reassurance through central government policies to support the horticulture sector through various subsidy programmes such as the National Fertiliser Subsidy Programme, National Seed Policy, Planting for Food and Jobs, tree crop development authority, equipment subsidies among others. It has also afforded a space for sub-national governments, within enclaves where horticulture businesses are dominant, to support road infrastructure, monitoring of farms among others.

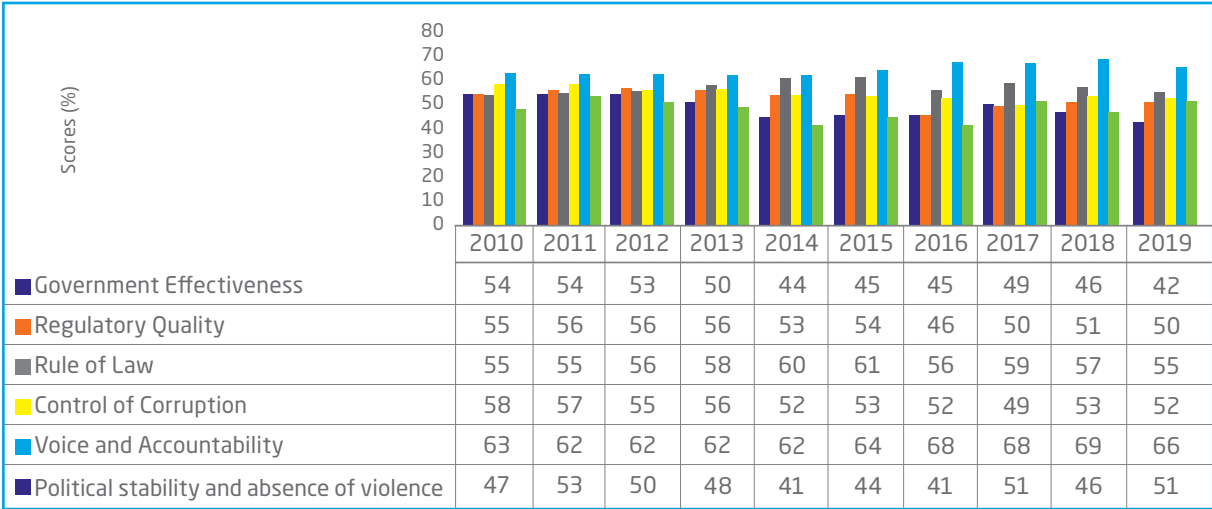
These overall political and governance achievements masks several significant democratic and governance deficits that still confront the country over the last decade or more, and the growing threats to peace and political stability, especially before, during and after each general election.⁸ Moreover, Ghana's democratic stability has arguably not translated into addressing significant socio-economic and governance challenges, as weak macro-economic fundamentals continues to persist, deepening unemployment among young people, unfavourable trade and export policies have driven many farmers and local businesses out of operation, endemic corruption and clientelism and rent-seeking activities, with severe implications for businesses

in the horticultural sector (as businesses have to navigate a complex web of relationships and layers of bureaucratic hurdles to secure relevant financial and logistical incentives, clearances/documentation and approvals for exports and benefit from state subsidies.⁹

Recent developments in the political situation of importance to the horticulture sector

While Ghana remains one of Africa's politically stable countries, its economic transformation and state effectively remains very challenged. On the BTI Transformative Index, the country scores eight out of ten on political transformation and 6.2 and 5.6 out of ten on governance and economic transformations. The weak performance in governance is also depicted on the country's score on the World Governance Indicators. Between 2010 and 2019, Ghana's average score on overall *Government Effectiveness* was just 48.2 percent, depicting the country as a below-average performer. Of 6 indicators, the most significant deterioration was recorded in overall government effectiveness (-12 percent), followed by control of corruption (-6 percent) and then the quality of regulatory institutions (-4 percent). This overall deterioration in governance has implications for a favourable environment for doing business and policy coherence for long term decision making by businesses. In the horticultural sector, these weaknesses in governance are also evident in the relations of sector businesses with national actors, regulators and sub-national state mechanism for implementing policies.

Figure 1: Selected governance indicators, 2010-2019



Source: 2020 World Governance Indicators. <https://info.worldbank.org/governance/wgi/Home/Reports>

⁷ Mo Ibrahim Foundation (2020), '2020 Ibrahim Index of African Governance Index Report'. Available at: <https://mo.ibrahim.foundation/sites/default/files/2020-11/2020-index-report.pdf> (accessed September 5, 2021).

⁸ UNDP 2023

⁹ UNDP 2023

1.2 ECONOMIC AND SOCIAL INDICATORS IN GHANA

While the economy of Ghana continued to expand until 2019, with real GDP growth estimated at 7.1%, these positive developments have been tempered by two external shocks: (a) the COVID-19 pandemic (The pandemic had a severe impact on major economic activities causing growth to slow to 0.4 percent in 2020); and (b) the Ukraine-Russia of 2022. Food prices spiked, and the decline in the value of the country's currency, the Ghana Cedi, depreciated by close to 54 percent and placing it among one of the steepest declines of any currency in the world in 2022.¹⁰ Currently, inflationary pressures coupled with volatile exchange rates, the post-COVID 19 supply chain disruptions and recent flooding of the volta lake (with associated implications for medium to large scale farms along the Volta and Eastern regions) have hampered the export of both raw and finished goods from the horticulture sector, with implications for profitability of businesses in the sector, wage levels in the sector and sustainability of jobs in the sector.

The economy remains driven by commodities, with cocoa playing the dominant role.¹¹ The cocoa sector alone accounts for more than 30% of the country's export earnings and close to one million in direct employment. There are options for Ghana to accelerate the transformation of agriculture and create an environment of similar economic miracles as witnessed in Asia including raising land productivity in agriculture through the adoption of practices and technologies that boost output per unit of land, public investment and promotion of sub-sectors such as fruits and vegetables, and introduction of improved seeds, credit, quality control, effective farmer organizations, and public-private partnerships to enhance government interventions. To harness the transformative potential of the horticulture sector, more effort is needed to strengthen relationships with businesses and research and target scarce resources to selected horticulture value chains such as bananas, mangoes and chillies with the greatest growth and employment potential.

In respect to Human Development, Ghana ranked 133 out of the 189 countries that participated in the 2023 Global Human Development Index annual rankings.¹³ The metrics for determining the level of transformation include social and economic development, inclusive development, and distribution of the economic gains in the transformation. The general trend is a marginal upward movement in the index over the last decade. While this points to progress in the social economic conditions of people, granular analysis shows significant disparities in the distribution pattern of progress and major inequalities with regard to incomes. In real terms, however, the distribution of wealth remains uneven along geographies especially the huge gap between the north and the south and also on the lines of gender. In 2022, the Global Gender Gap Index ranked Ghana at 108 out of 149 countries.¹⁴ Indeed, the situation with gender equality has shown a persistent trend of low economic empowerment of women. The import of this trend is that the general macroeconomic performance in the last decade has not translated into a significant socio-economic transformation of the structure of the economy, with widening inequalities for women who dominate activities in the agricultural and informal sectors in particular.

1.3 INCOME AND POVERTY

In terms of Ghana's social context, based on findings of the Ghana Living Standards Survey round 7 (GLSS7), poverty is declining, albeit at a slower pace, with the current poverty rate at 23.4 percent and extreme poverty at 8.2 percent. Poverty remains a rural phenomenon: richer regions in the southern part of the country experienced higher poverty reduction while poorer regions of the north did not.¹⁵ The situation in poorer regions is further exacerbated by higher and widening inequalities whereas richer regions experienced a decline in inequality. Yet, a recent analysis by the World Bank¹⁶ points to a potential increase in the proportion of Ghanaians (about 850,000) in extreme poverty due to inflationary pressures, food insecurity as well as the implementation of fiscal policies to reform the macro-economic fundamentals in 2023 continues to bite hard on the economy.¹⁷

¹⁰EIU. 2022. 'Rising economic hardship will fuel social unrest in Ghana', 29 June. <https://country.eiu.com/Ghana>

¹¹Bank of Ghana, 2020

¹²<https://hdr.undp.org/data-center/country-insights#/ranks>

¹³<https://hdr.undp.org/data-center/country-insights#/ranks>

¹⁴<https://www.statista.com/statistics/244387/the-global-gender-gap-index/>

¹⁵World Bank (2020). Ghana Poverty Assessment. <https://openknowledge.worldbank.org/bitstream/handle/10986/34804/Ghana-Poverty-Assessment.pdf?sequence=1&isAllowed=y>

¹⁶'Price Surge: Unravelling Inflation's Toll on Poverty and Food Security' on July 19th, 2023

¹⁷ <https://gna.org.gh/2023/07/some-850000-ghanaians-pushed-into-poverty-in-2022-world-bank/>

1.4 NATURAL ENVIRONMENT

Socio-economic development in Ghana is intertwined with the stability of its natural environments. The country's nature-dependent agricultural sector coupled with the interlinked value chains, occupy a considerable position in the national income and employment opportunities.¹⁸ The country faces environmental challenges roughly due to its rural, urban, and coastal landscapes. The country has experienced a high cost of environmental degradation in the forms of agricultural land degradation, deforestation, illegal mining, and flooding, with implications for the agriculture sector broadly and the horticulture sector in particular. The recent floods in the Volta Lake have disrupted the operations of several horticulture sector businesses such as GEL, and (Volta River Estate Limited) VREL among others. This situation can lead to serious job losses and undermine the sustainability of horticulture businesses that are dependent on the river.¹⁹ Hence, stakeholders in trade unions, private sector and government must partner with the media to advocate against negative environmental practices which has implications for horticulture sector production and exports.

1.5 GENERAL HUMAN RIGHTS SITUATION IN GHANA

Ghana is a State Party to eight out of nine core international human rights instruments/treaties.²⁰ Specifically, Chapters 5 and 6 of the 1992 Constitution guarantee, amongst other things, the protection of the rights to life, personal liberty, protection from slavery and forced labour, protection from inhumane treatment, the unlawful deprivation of property, privacy rights, freedom of conscience and religion, freedom of movement, association, assembly and speech. It also guarantees a right to information. Furthermore, it has provisions specifically guaranteeing rights to marginalized groups, including people with disabilities, children, and women.

There is also a broad range of domestic laws relevant to business and human rights and a number of international conventions that Ghana has signed or ratified relevant to business and human rights as well.²¹ The human rights provisions outlined in the above sections are applicable to all businesses operating in Ghana, and the courts have frequently upheld the application of human rights against private entities. It is not uncommon for actions against Ghanaian businesses for negligence²², or wrongful dismissal²³ to be framed in Human Rights terms. The Human Rights provisions of the Constitution have also been used as a basis for the application of administrative justice rights against businesses. These have been enshrined in Article 23 of the Constitution.²⁴

Numerous studies suggest that there are significant challenges created by businesses which engage in activities that violate the human rights (individual, social, or economic rights) of individual Ghanaians, including those in the horticulture sector.²⁵ Consequently, the Government of Ghana has taken steps to improve the responsible business climate of the country. *A baseline assessment of the business and human rights climate of Ghana has been conducted.* The assessment found that *Ghana has a robust human rights legislative framework overall, but gaps still remain when it comes to responsible business conduct, especially its enforcement practices.* Importantly, Ghana is in the late stages of development of a *National Action Plan*²⁶ on Business and Human Rights. This has resulted from engagements with the private sector (including those in the horticulture sector), civil society organizations (CSOs), and other relevant actors, to foster a culture of dialogue and cooperation, encouraging businesses, including those in the horticulture sector, to embrace their human rights responsibilities and take proactive measures to prevent and address any adverse impacts.

¹⁸UNEP: Ghana | Interactive Country Fiches (unepgrid.ch)

¹⁹<https://mobile.ghanaweb.com/GhanaHomePage/business/500-hectares-of-rice-40-hectares-of-banana-farms-submerged-at-Asutua-re-over-dam-spillage-1865807>

²⁰Ghana is party to the following eight international human rights treaties (with date of ratification): International Convention on the elimination of all forms of racial discrimination (CERD - ratified on 8 Sept 1966), Convention on the Elimination of All Forms of Discrimination against Women (CEDAW - ratified on 2 Jan 1986); Convention on the Rights of the Child (CRC - ratified on 5 Feb 1990), Convention against Torture and other cruel inhuman and degrading treatment or punishment (CAT - ratified on 7 Sept); International Covenant on Civil and Political rights (ICCPR - ratified on 7 Sept 2000); International Covenant on Economic Social and Cultural Rights (ICESCR - ratified on 7 Sept 2000); International Convention on the Protection of the rights of all Migrant Workers and Members of their Families (CMW - ratified on 7 Sept 2000); Convention on the Rights of People with Disabilities (CRPD - ratified on 31 July 2012). One international human rights treaty has been signed by the state of Ghana but not ratified: Convention of the Protection of all Persons from Enforced Disappearance (signed on 6 Feb 2007).

²¹UN Human Rights Committee on Ghana (2016), CCPR/C/GHA/CO/1, Par 9.

²²Paul K. Agyekum v John Ayitey, Gellog Limited, Suit No: HRC 31/09, The 18th Day of April 2011, Before His Lordship, Justice Uter Paul Dery,

²³Francis Ebo Abrahams v Hotel Investments (Ghana) Limited Suit No. INDL 8/10 HE 17th Day of November 2011

²⁴Case number J1 3 of 2010 [2011] GHASC 19 (06 April 2011)

²⁵Statement at the end of visit to Ghana by the UN Working Group on Business and Human Rights, Accra (17 July 2013) last accessed 26 October 2022 at <https://www.ohchr.org/en/statements/2013/07/statement-end-visit-ghana-un-working-group-business-and-human-rights-accra-17>.

²⁶A NAP on Business and Human Rights is therefore an "evolving policy strategy developed by a State to protect against adverse human rights impacts by business enterprises in conformity with the UNGPs"

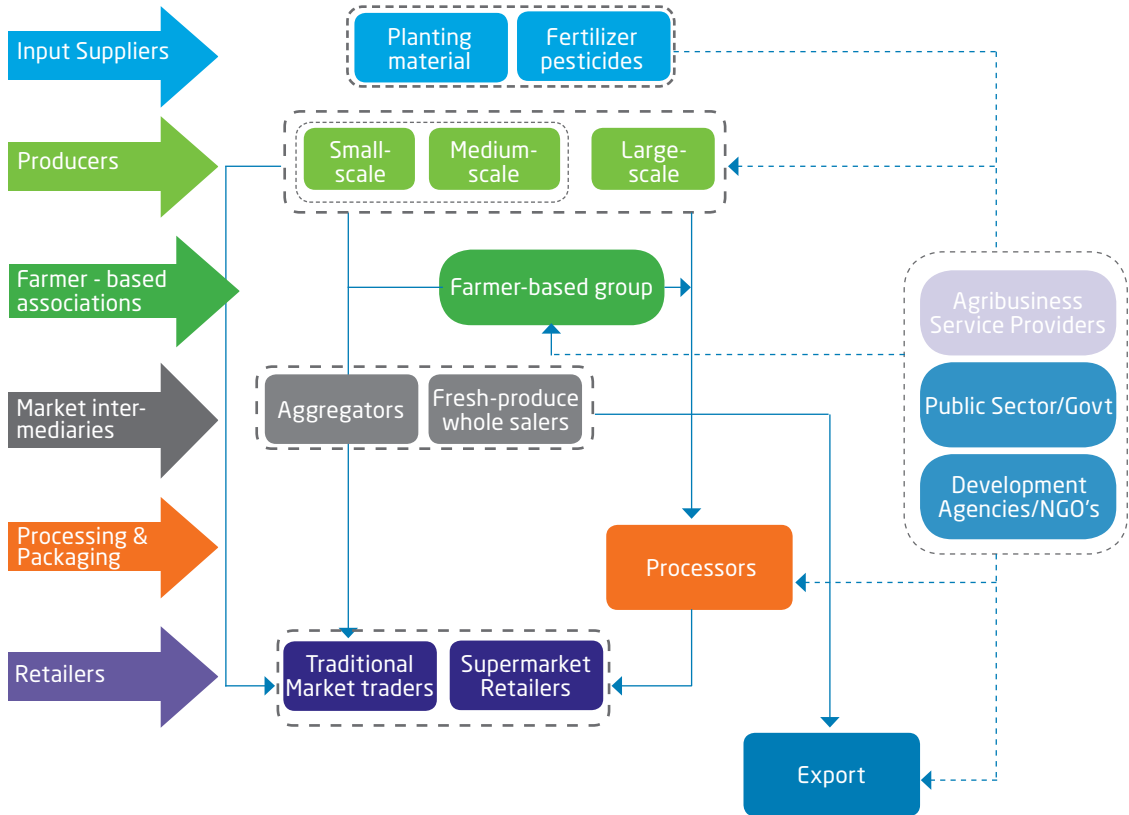
CHAPTER 2: STAKEHOLDERS AND ACTORS IN THE HORTICULTURAL VALUE CHAIN IN GHANA

2.1 STAKEHOLDER MAPPING SUMMARY

Across the horticulture value chain (see Figure 2), there are actors (including public and private actors and informal and formal actors) that are interconnected from production to final markets. Starting from smallholder farmers and commercial operators who supply raw commodities, which are then aggregated by traders and/or processed by food companies to add value. There are also those large commercial companies and institutions who have contracted farmers individually or based on out-grower schemes to supply raw commodities. Again, there is also the existence of labour unions, cooperatives and NGOs, associations (sometimes working with international federations and

agencies to cater for the needs, working and living conditions of workers (and farmers). Processors and exporters are linked to international buyers. Several public, private and international development agencies also provide services like research, extension, quality control and export promotion to support processing companies, smallholder farmers and outgrowers, cooperatives, labour unions among others. All the actors depend on the existing favourable climate and policy environment in getting horticultural produce locally and globally from farm to consumer markets. Appendix 2 provides detailed mapping, and a summary discussion is presented below.

Figure 2: Schematic representation of Ghana’s Horticulture value chain



Source: Authors (modified from Acquaye et al, 2021)

2.1.1 INPUT SUPPLIERS AND SERVICE PROVIDERS

Across the value chain, critical input suppliers include those who provide seeds, financing and other technical services during pre-production stages. Key among them include formal seed suppliers such as the Seed Producers Association of Ghana, National Seed Trade Association of Ghana, companies such as the West Seeds company, Wienco (for fertilizer), etc., who import various seeds and agrochemicals into the country. These companies have centralised warehousing and work with sub-national partners to the suppliers of their inputs across the country.

Institutions such as the Angel Investment companies, Ardhi Investment Group, and Banks such as the Agricultural Development Bank (ADB) and National Investment Bank (NIB) provide farmers and producers loans and credit to invest in their businesses. These are mainly common among large-scale farmers or producers, and smallholders are left to micro level investment companies due to their inability to provide sufficient evidence of payback plans or collaterals to secure their loans. More recently, the Ghana Exim Bank is supporting some factories and initiatives to set up new processing factories to produce pasteurised fruit juices (mango, citrus and pineapple) for the domestic market and or export. One such funded project is the Ekumfi Fruit Juice Processing Company. The factory current employing about 475 outgrowers, the factory has created direct employment opportunities for over five hundred and fifty (550) people including engineers, food scientists, marketing professionals, accountants, and technicians. In addition, more than one thousand (1,000) indirect job opportunities in Ekumfi and other adjoining districts have been created.²⁷

Large-scale companies also provide technical support to farmers, but these forms of support tend to be crop-specific and are usually provided via cooperatives and outgrower schemes rather than to individual small holder farmers. Ghana's major fruit exporters, like Blue Skies, HPW, Bomart, Volta River Estate Limited (VREL), Golden Exotics Ltd (GEL) among others, provide end-to-end assistance to contracted out-growers - supplying pre-approved inputs on credit, testing soil, and aiding harvest and logistics. This tight integration helps outgrowers to produce to meet strict European quality standards. As highlighted above, most smallholders struggle to access such services and often lack

the capacity to adopt good practices to enable their produce be competitive and meet both food safety and global quality standards.

Service providers, such as Esoko, GIZ, provide technical input and training to farmers across the horticulture value chain. These service providers mainly focus on the financial, packaging and quality standards. Also, NGOs like Solidaridad, TechnoServe and SNV have piloted and implemented sustainable production programs for domestic markets by mobilising private sector partners and leveraging group dynamics. The focus is on building local advisory skills and economically empowering mainly women farmers rather than maximising output. USAID²⁸ and others also fund projects supporting input access and technical skills for high-return horticulture crops, offering nutrition and income benefits (see Table 2).

2.1.2 PRODUCTION

There are smallholder farmers, farm cooperatives who cultivate crops and receive input for their operations and commercial farmers. Key examples of fruit farmers or producers in Ghana include Blue Skies Products Ghana Ltd, Bomart Farms, Ekumfi Juice Ltd, Many Krobo Mango Farmers Association (MKMFA), Dangme West Mango Farmers Association (DWMFA), Samsam-Odumase Co-Operative Pineapple Growers and Marketing Lt, Fotobi Cooperative Pineapple Growers and Marketing Society Ltd, The Volta Value Chain Committee Union (VVCCU). Key vegetable and seed producers include the Okro Outgrowers and Marketing Association (OOMA), Agogo Ginger Outgrowers and Marketers Association, among others. Most of these producers have various types of workers, ranging from permanent, seasonal, temporary, casual. Majority of these workers are not affiliated with labour unions and lack information about their legal rights, in particular their right to freedom of association and collective bargaining, and the conditions under which workers are entitled to permanent contracts and associated social protections.

Informal Smallholder Farmers and Groups

The smallholder farmers make up the backbone of domestic horticultural production and are estimated at over 90%. They mainly cultivate for the local market on 1-4 hectares, relying predominantly on family labour, sometimes hiring 2-5 people to work with them, using

²⁷<https://www.gepaghana.org/1d1f-akufo-addo-commissions-ekumfi-fruits-and-juices-factory/>

²⁸The approach in selecting beneficiaries is based on (i) those recruited from local farmer/crop associations and (ii) emerging start-ups or those randomly recruited due to their current level of work and support needed.

basic farming techniques and minimal mechanisation. The groups within this category organise themselves informally and loosely on an ad-hoc basis, and group members handle leadership, if any, directly. Key issues affecting their operations highlighted throughout this research included limited access to credit, quality inputs, and promising markets. Examples of informal smallholder farmers in the fruit sector include Adonten pineapple farmers, Fruit farmers in Akwapim South, Aburi-Amanfo Cooperative Pineapple Growers, the Jei Krodua Mangoase Pineapple among others. Informal vegetable farmers include Okushiade vegetable cooperative, Tomato farmers in Tuobodom, Vegetable Growers Association among others. As indicated, majority of small holders have few workers and these workers are usually casual and lack permanent contracts, because permanent contracts give workers access to improved working conditions, increased job security, paid leave, improved legal protection and a greater likelihood of benefiting from private sector codes and standards.

Out-growers and Organised Smallholder Farmers

Some out-growers produce crops under contract to supply to agribusiness firms or large commercial farms/ companies. There are over 100 out-grower groups made up of 30 farmers or more. Many of them are organised into producer cooperatives connected to at least one processor, thus enabling them to obtain certification (e.g. Fair-Trade certification) when possible and in demand. The out-growers receive inputs (both seed, etc), technical advice and a market guarantee from the processors and exporters. Outgrowers are contracted or recruited either (i) through direct contracts or farming for large processing companies or (ii) contracted through or in partnership with some farmer associations or farmer groups where there is an agreement to produce goods. Key examples of outgrowers include Blue Skies outgrowers, with about 1200 members, and HPW, with 1400 out-growers. Key vegetable and seed producers and outgrowers include the Okushiade vegetable farmers with over 2000 members, Okro Out-growers and Marketing Association (OOMA), Agogo Ginger Outgrowers and Marketers Association, among others. Almost all outgrowers interviewed for this study indicated that they lacked information about their legal rights, in particular their right to freedom of association and collective bargaining, and the conditions under which workers are entitled to permanent contracts and associated social protections. There is need for development partners and international NGOs to ensure that compliance with international and national labour rights, and payment of at least the

minimum wage for all types of workers by outgrowers is made a requirement by local sourcing companies in their purchase contracts with suppliers.

Farmer Associations and Cooperatives

These include formal, semi-formal and informal groups who produce similar crops and are interested in specific farmer sub-groups. Key examples include those with a bit of more formally defined organisational processes, such as Apex Farmers Organisation in Ghana (ApFOG), those who have come together due to knowledge dissemination, partnerships with developmental programs (such as the Vegetable Producers and Exporters Association of Ghana (VEPEAG). These are mainly organised around interests in specific crops or sub-sectors and are mainly registered with elected executives. The Ghana National Tomato Traders and Transporters Association, GNTTTA, for instance, is a well-structured association regulating the tomato supply chain in Ghana. The GNTTTA has a decentralised and hierarchical organisational structure. At the base level, it has membership associations/unions representing members' interests in the respective sector or localities. The leadership is elected democratically from this membership base through regional and national executives. There are also informal and semi-formal ones, such as the Aburi-Amanfo Cooperative Pineapple Growers, the Jei Krodua Mangoase Pineapple and Vegetable Growers Association, Nkukrom Cooperative Pineapple Growers and Marketing Society, Fotobi Cooperative Pineapple Growers and Marketing Society Ltd. These are characterised by a selected/ elected leadership and registered. There are also those who just informally come together to form a united force within a particular sub-sector/ crop either for information sharing purposes, welfare purposes or provide farming support to each other. Aside the critical need to support the strengthening of the structures of cooperatives and associations while support affirmative actions /policies to ensure women are adequately represented in the leadership of producer groups/ cooperatives, it is essential to improve smallholders' access to credit via establishment of more credit unions, group savings/ credit schemes, and/or strengthened PMOs linked to banks and microfinance institutions.

Commercial-scale Producers

There are currently a few active commercial-scale producers who often produce on land above 20 hectares. These are mainly professionally managed and mechanised, combining their own large cultivation areas and sometimes complemented with out-grower

arrangements with smallholders. Key examples include Blue Skies Products, with 1000+ farmers; HPW, with about 1400 farmers, Bomart Farms with 600 out-growers, Golden Exotics Limited, with 200+ farmers and the Volta River Estates Ltd, Musahamat Farms Ghana Ltd, etc. Their farm sizes vary widely from 20 to over 200 acres, with employed farm managers and supervisors using machinery for land clearing, planting, and producing on irrigated land. Large-scale commercial farming is common for mango, banana, and pineapple plantations with acreages of over 300 hectares. Majority of these commercial farmers have permanent, seasonal and casual workers. While some workers are unionized, some of their workers are not unionized. Majority of their seasonal and casual workers lack permanent contract and hence lack workers access to improved working conditions, increased job security, paid leave, improved legal protection and have smaller likelihood of benefiting from private sector codes and standards.

OTHER COOPERATIVES AND ASSOCIATIONS

Farmers Organisation Network in Ghana (FONG):

Established in 2003, FONG serves as an umbrella organisation representing the interests of smallholder farmers and local farmer groups at the district, regional and national levels in Ghana. It hosts over 100 members and is governed by democratically elected National Executives and a National Secretariat governed by a General Assembly formed by member organisations. It aims to empower individuals and members in order to contribute to agriculture development. It operates as a non-governmental membership-based farmer organisation network and does not have formal links with larger trade unions such as GAWU and FAWU, though individuals are allowed to join labour unions of their preference. Groups such as Okushibiade vegetable farmers association are members of FONG. It also collaborates and partners with development partner organizations such as the USAID, GIZ, FAO, etc.

2.1.3 PROCESSING/ PROCESSORS AND PACKAGING

Across the horticulture value chain, processing is one of the key activities and three classes of processors were identified, and the characteristics and structures are discussed below;

Small-scale Processors

Small-scale processors represent a class of processors with daily processing capacity ranging between 1 ton and under 5 tons per month. These include typically micro-enterprises engaging less than 5 workers, operating in a specific locality, and procuring raw materials from surrounding farmers. These processors produce exclusively for the domestic market. Small processors, as a result of their modest capitalisation are for the most are only able to source second and third grade products. Equally, small-scale processors are reliant on domestic fabricated equipment, a tiny class of such processors procure equipment from the Chinese market. This class of processors tend to produce fresh-cut fruits and mango pineapple juice blend.

They rely on casual workers who are mainly non-unionised and lack information/education about their legal rights, in particular their right to freedom of association, payment of at least the minimum wage, collective bargaining and the conditions under which workers are entitled to permanent contracts and associated social protections.

Medium-scale processors

Process and package volumes are in hundreds or few thousands of metric tons annually, focusing on primary processing like drying, pickling, juice making etc. Key examples include Joy Springs Ent, Judacy Plus, Ideal Providence Farms, Yvaya Farms, Peelco. They process fruits into final products like snacks, seed oils, jams etc made from fruits, vegetables, seeds and nuts for mainly for local markets, or for high-level domestic stores. Target consumers are local markets rather than meeting export market requirements.

They rely on a mix of seasonal and casual workers who are mainly non-unionised and lack information/education about their legal rights, in particular their right to freedom of association, payment of at least the minimum wage, collective bargaining and the conditions under which workers are entitled to permanent contracts and associated social protections.

Table 2.1: Overview of the structure of some processing and export size

| Size | Process Volume (mt) | Installed capacity | Export Volume (in Mt) | Examples |
|-----------------|---------------------|--------------------|-----------------------|-----------------|
| Small to medium | <2000 | <10 | <10,000 | AB farms, |
| Large | >2000 | >10 | >10,000 | Blue Skies, HPW |

Large-scale processors

These large-scale processors represent commercial-intensive companies with a daily production capacity above 10 tons. Large-scale processors engage in elementary and advanced processing, producing fresh cuts, fruit juice and dried vegetables. They maintain a complete value-addition chain from growing, processing and storage. They mainly source their produce from supervised out-grower farmers and farmer associations. They offer contracts in out-grower schemes, providing technical assistance services to growers and negotiating purchasing prices before harvest, a strategy which ensures stable supply and mitigates against price volatility. Key processors include Blue Skies, HPW Fresh & Dry Limited, Bomarts Farms Limited, Pinora, and Weddi Africa Tomato Processing Company (see Table 2.2); all have state-of-the-art equipment and are exported mainly to the EU market.

One key issue is that most processors are operating below capacity; just over 65% are operational at peak production. Large processors employ a mix of permanent, seasonal and casual workers. While their permanent staff may be unionised and have understanding of their labour rights, majority of their casual and seasonal workers as well as outgrowers are mainly non-unionised and lack information/education about their legal rights, in particular their right to freedom of association, payment of at least the minimum wage, collective bargaining and the conditions under which workers are entitled to permanent contracts and associated social protections.

2.1.4 EXPORTERS

These are formally registered entities with a commercial focus working with smallholders through out-grower schemes (e.g. ETG Ghana Ltd) and iterating to provide market conduits, agronomic support, and meet export documentation-certification needs for smallholder beneficiaries (e.g. Ltd Volta River Estates). These range from the small to medium and large exporters.

Small and medium scale exporters

Private sector participation in the export of fruits and vegetables remains strong in Ghana. Companies such as AB Farms Ltd, A.T. Mahli Farms Ltd, Agrigold Resource Development Ghana Limited, Akafad-Pa Company Limited, Eve-lyn farms, albe Farms Limited, Albert Mills Agbeko, Alexandr Atuobi, Alhaji Awudu Karim Enterprise Ltd, Joekopan Enterprise and Ayaawan Harrison are involved in the export of multiple products within the horticulture value chain. A common strand that characterises these organisations or companies is individual ownership. They often rely on smallholder

farmers, and their annual exports are below 10,000 (<10,000mt). They rely on casual workers who are mainly non-unionised and lack information/education about their legal rights, in particular their right to freedom of association, payment of at least the minimum wage, collective bargaining and the conditions under which workers are entitled to permanent contracts and associated social protections.

Large-scale exporters

These entities export fresh and processed horticulture produce to different countries, mainly over 10000 mt. They also primarily source their produce from commercial mega-firms and sometimes supervised outgrower farmers and farmer associations, where automated lines are used to meet the highest quality standards (HACCP, GlobalGAP, etc.). They offer contracts in out-grower schemes by providing technical assistance services to growers and negotiating purchasing prices prior to harvest, a strategy that ensures stable supply and mitigates against price volatility. Key exporters include Blue Skies, HPW Fresh & Dry Limited, Bomarts Farms Limited, and Pinora Companies (see Appendix 2), who exported mainly to the EU market.

2.1.5 EXPORT AND MARKET ORGANISATIONS AND ASSOCIATIONS

These are formal sector-specific member associations that collectively advocate for policy changes as well as Self-funded non-profit associations offering capacity-building support and market updates to members. Ghana has different export organisations and associations covering the various sectors of the horticulture value chain.

Federation of Associations of Ghanaian Exporters:

FAGE is an umbrella trade association body representing various commodity and business associations in Ghana's export industry. Operations involve facilitating trade between member associations, providing export training programs, organizing networking platforms for exporters, and undertaking policy lobbying and campaigns aimed at addressing common challenges faced by members. It comprises 22 associations across the fruit, vegetable and business sectors and 1,200 Companies. Funding sources are membership dues and partnerships with development agencies. However, two main gaps were raised as gaps in service to its members: (1) Inability to set up adequate financing and credit guarantee vehicles dedicated to support exporters. This situation compels members to depend on commercial banks with high-interest rates, and (2)

Fragmented Membership: Diverse interests across different associations make consolidated lobbying positions challenging. Disjointed efforts reduce the impact of advocacy.

Sea-Freight Pineapple Exporters of Ghana (SPEG):

This is a group of over 30 pineapple and other fruits producers and exporters in Ghana who currently together export an average of 30,000 tons of fresh pineapples per year in reefer vessels and by air. SPEG assists its members in maintaining good quality standards, attaining certification (GlobalGAP) and providing shipping arrangements. SPEG aims to bring pineapple and fruit industry operators together and promote good agricultural practices while delivering efficient, effective, and economical logistics services.

Ghana Association of Vegetable Exporters (GAVEX): Ghana Vegetables Association, which comprises the top exporters of Asian and African vegetables from Ghana, has existed for the past ten years. This association aims to establish Ghana as an essential vegetable producer and exporter on the world market under a brand name synonymous with quality and consistency. The association provides the following services to its members: quality improvement through sensitisation and training of members and advocacy for conditions favourable for vegetable export from Ghana. Memberships are voluntary and require prospective members to register or be registered.

Vegetable Producers and Exporters Association of Ghana (VEPEAG):

VEPEAG was established in October 1997 by individual Farmers and Exporters. The association's main activities and operational areas are the production of vegetables all year round for international and local markets and the supply of seeds and agro-chemicals to producers. Sweet potatoes, Okra, Chili, Tinda, Shallot and Turia are the primary vegetables cultivated. Membership currently stands at 460 and can be found in seven regions of the country. VEPEAG provides and supports some of its members in accessing markets or offering them the opportunity to benefit from funded programmes and training. It works in close collaboration with the Ministry of Food and Agriculture (MoFA), the Ministry of Trade and Industry (MoTI), the Ghana Export Promotion Agency (GEPA), the University of Ghana (UG) and the German Development Cooperation (GIZ) in Ghana.

2.1.6 GOVERNMENT INSTITUTIONS AND REGULATORY BODIES

The various central government institutions provide an indispensable institutional environment for coordinating national policies, regulating standards, facilitating linkages and supporting research relevant to Ghana's horticulture sector.

Ministry of Food and Agriculture (MoFA) - Core ministry supporting production, research and extension services across crops. Operates through agencies like the horticulture unit input supply and services and the Agricultural Engineering Services Directorate for some processing and storage infrastructure. However, significant gaps exist in providing mechanisation services, irrigation infrastructure, and climate-smart advisory services to farmers. Within MoFA, the Horticultural Division and Directorate of Crop Services specifically cater to the horticulture sub-sector. They liaise with other agencies under MoFA, like the Plant Protection and Regulatory Services Directorate, on input standards and phytosanitary enforcement for horticultural crop exports. It is also responsible for testing technologies developed at the various research institutes for local adaptation.²⁹

Ghana Export Promotion Authority (GEPA) - Supports exporters in horticulture value chains with market links, capacity building and information services. However, gaps persist in trade data management, addressing non-tariff barriers for agro exports and targeted financing facilities for smallholder farmer groups eyeing export markets.

Food and Drugs Authority (FDA) - Sets standards and regulates quality control along domestic and export marketing chains. Yet, gaps exist in expanding the participation of smallholder farmer groups in its Voluntary Quality Certification Scheme, which is essential for accessing high-end markets.

Ghana standards authority - GSA is the national standards body overseeing the standards ecosystem in Ghana across sectors. In the horticulture sector, it supports in developing and promoting standards related to quality, safety and technical specifications for various products and services to meet local and international market standards. It also issues production, processing etc certification that enables standards compliance for local firms and exporters. Some key international standards adopted include those published by ISO, IEC, CEN, CENELEC etc.

²⁹<https://pef.org.gh/index.php/en/content-classification/item/139-horticulture-in-ghana>

2.1.7 LABOUR UNIONS, AND ORGANISATIONS

Ghana has two trade union federations- the Trade Union Congress (TUC) and the Ghana Federation of Labour (GFL). Each of these federations has national unions organising different classes of workers in different sectors, including the food and agricultural sectors. For the horticulture sector, the General Agricultural Workers Union (GAWU), an affiliate of TUC, the Union of Education, Agriculture and General Services (UNEAGES), an affiliate of GFL and the Industrial and Commercial Workers Union (ICU) (which is not affiliated to any of the two federations) were noted as active.

The GAWU of TUC - The General Agricultural Workers Union (GAWU) was founded in 1959, with the merger of the Agricultural Division Workers' Union, the Animal Health Workers' Union, the Forestry Division Employees' Union and the Produce Inspection Employees' Union. Initially, almost all its early members worked for state-owned businesses, but it gradually evolved to have strong representation in both the public and private sectors. In 1979, GAWU started organising self-employed agricultural workers in 1979 (Osei-Boateng & Ampratwum, 2011). GAWU's membership was estimated at 50,000 in 2018.

The GAWU adopts a mix of strategies to mobilise informal sector workers. Aside self-employed farmers who constitute the majority of GAWU's membership, it has also granted associate status to associations in the food processing chain. These include the Novotel Market Traders Association, whose members retail fruits and foodstuff, fruit juice, and powdered pepper, and the Fish Processors Association in Kpando, in the Volta Region of Ghana.³⁰ GAWU has a strong presence in the horticulture sector, although their activities are

largely limited to formal companies such as Golden Exotic Ltd, Volta River Estates and Gold Coast Fruits, among others. Aside from the traditional roles of representation, workers' rights promotion and collective bargaining, GAWU undertakes several initiatives to promote decent work. For instance, between 2013 and 2018, GAWU collaborated with Banana Link to educate and empower workers and their unions to negotiate living wages and improved conditions on banana and pineapple plantations.³¹ GAWU has also in collaboration with Mondiaal FNV been promoting productivity, employment creation and income generating activities among rural producers.³² The union is also a member of IUF with who it has many collaborations to improve the working conditions of its members. GAWU aspires to be able to organize horticultural farmer cooperatives and outgrower groups to enable them to improve their income and working conditions.

The UNEAGES of GFL - The UNEAGES of GFL is a break-away union from the Food and Allied Workers Union (FAWU) of GFL. Currently, UNEAGES organizes workers from the agriculture, education and general services and have a membership of about 7400. UNEAGES reported significant loss of its members during the COVID period as some of their employers either closed down or downsized their capacity. Currently UNEAGES organizes workers of three horticultural companies as shown in Table 2.2. Majority (60-70%) of the workers of these three companies are women who mainly undertake farmhouse roles with few in supervisory positions. All three companies offer a mix of permanent, contract and casual employment. They also have arrangements with outgrowers to whom they provide inputs and training to support them meet their product specifications.

Table 2.2: Horticulture Workers Organised by UNEAGES

| Company | Product | Total Staff Strength |
|----------------------|------------------------|----------------------|
| Milani Queen Farms | Pineapples | 600 |
| Kaleo | Pineapples | 466 |
| HPW (central region) | Pineapples and Mangoes | 800 |

Source: interview with General Secretary of UNEAGES.

³⁰Osei-Boateng et al (2015) Mapping of manifestations of collective action in the informal economy (IE) in Ghana- A Report compiled for NWO-WOTRO research project: Increasing political leverage of formal and informal workers organizations: the cases of Ghana and Benin.

³¹General Agricultural Workers' Union of Ghana (GAWU) | Banana Link retrieved 14/01/2024

³²GAWU & our 60 years of promoting decent work in agriculture - The Business & Financial Times (thebftonline.com) retrieved on 14/01//2024

UNEAGES has CBAs covering the different class of workers in each of these three companies. All CBAs are consistent with provisions in the Labour Act to guarantee the workers' salary and statutory benefits such as pension, annual leave and maternity leave for women. It has also been able to secure other non-statutory benefits such as medical care, provident fund, compassionate leave and education subsidy as well as annual salary increases. Aside playing roles in collective bargaining, the union provide training to their members. UNEAGES aspires to organize outgrowers and other informal sector horticulture groups to help protect their incomes and improve their working conditions. For instance, it is currently in the process of organising Dangbe Farmers Association in Dodowa. UNEAGES is open to partner FNV Mondiaal to pursue collective interests in the horticulture sector.

The ICU - The ICU, previously the Industrial, Commercial, and General National Workers' Union was founded in 1960 and was an affiliate of the TUC until 2003. As of 2021, the union reportedly had about 65,000 members.³³ ICU is a general union as it represents workers and own account workers from all industries and companies, rather than just one organisation or a particular sector. ICU aside collective bargaining and representation roles has been building the capacities of its members on many issues including sexual harassment and Occupational Safety, Health and Environment (OSHE). ICU organises some workers at Golden Exotic Limited, a banana export company and has been involved in initiatives by the Banana Link and IUF to support build workers capacities and improve their working conditions. ICU has also had collaborations with FNV on different objectives including cooperation to improve working conditions of cocoa workers.

2.1.8. EMPLOYERS ASSOCIATIONS

Ghana Employers Association (GEA) - The GEA is an association of private sector employers in Ghana with their membership cutting across all sectors including horticulture. The agency is an active participant in social dialogue as a tripartite member on different issues including economic and social policies and industrial relations. On industrial relations, GEA is a member of the Tripartite Committee that sets the minimum wage and has representation at the National Labour Commission (NLC). It also engages in collective bargaining with trade unions on behalf of their members and

provide advice to their members on legal, labour and employment issues.

Private Enterprise Foundation (PEF) - The PEF is a business membership organisation championing the interests of the Ghanaian private sector. The foundation works to promote entrepreneurship, strengthen businesses, and shape national policies. It comprises over 200 businesses and associations across manufacturing, agriculture, services, etc. It takes part in advocating and policy lobbying to improve the business environment, including the horticulture business, developing partnerships between public agencies and the private sector, delivering business advisory services and capacity-building programs and facilitating access to markets and finance for SME/ small horticulture companies. The governance structure includes a Chief Executive Officer and executive management team and is governed by a Board comprising heads of member businesses. The association also receives funding from membership subscriptions, donor agencies and government.

Association Of Ghana Industries - The AGI is part of the PEF, and it serves as the representative body and advocacy voice for Ghanaian manufacturing and processing industries. It has a membership strength of over 1200 companies across food processing, agribusiness, oil and gas, pharmaceuticals, etc. They work with other partners and mostly engage with policymakers on issues affecting industry competitiveness. Structurally, the association comprises a national governing council elected by members across 16 regional chapters led by a President, regional chapter Chairmen and CEO at secretariat.

2.1.9 DEVELOPMENT PARTNERS/ INTERNATIONAL DEVELOPMENT ORGANISATIONS AND NGOS

These include embassies, development partners and organisations such as Netherlands Development Organisation (SNV), the Netherlands Embassy, USAID, GIZ, East-West Seed Knowledge Transfer (EWS-KT), Fairtrade Africa, Ghana Netherlands Business & Culture Council among others who work by providing services and training to farmers and governments or supporting union groups to better the living conditions of workers.

SNV Netherlands Development Organisation - SNV works extensively in Ghana's agriculture sector, focusing on sustainable agriculture and poverty reduction.

³³Osei-Boateng, C and Ampratwum (2021), Evaluation of Cocoa Programme in Ghana, - Industrial Workers Union and the General Agricultural Workers Union. An End of programme Reported done for FNV Mondiaal

They provide technical assistance and capacity building and promote best practices among smallholder farmers and businesses in the horticulture sector. Specifically, they have piloted, implemented and supported focused projects on commercial fruit and vegetable production, providing technical training and support to farmers through the horticultural sector. Key project in Ghana, include working with the Ghana Vegetable Exporters and Growers Association (GAVEX) on the GhanaVeg project and the many other partners and farmers in the just-ended HortiFresh project.

USAID - The United States Agency for International Development funds agriculture, health, education and economic growth programs guided by host country priorities. Worked with Ghanaian organization the African Climate and Development Initiative (ACDI)/VOCA on agriculture and food security projects. USAID has funded projects such as Feed the Future, the ADVANCE IT, Ghana Trade and Investment Gateway (GHATIG), the RING among others, all aimed (implicitly or explicitly) at improving the horticultural value chain, connecting farmers to markets and improving finance and mechanisation.

GIZ - This German development agency implements projects in Ghana aimed at strengthening domestic horticulture production and food security by working with Ghana's Ministry of Food and Agriculture for sector coordination and closely with farmer-based organizations and private sector partners like agribusinesses and food companies to deliver program interventions. GIZ's "Employment for Sustainable Economic Development in Africa" (E4D) program in Ghana has implemented 15 projects with local private sector

companies in the areas of Skills Development and agribusiness. They have also been working with partners such as the European Union, USAID, and the Government of Ghana to improve the quality of agricultural production. For instance, as part of the E4D, it supports producers and processors in seven value chains (cashewnuts, peanuts, vegetables, mangoes, rice, soya, and sorghum).

Solidaridad Network - This organisation focuses on creating sustainable supply chains in various sectors, including agriculture. Solidaridad supports the horticulture sector in Ghana through initiatives that improve farming practices, enhance market access, and promote sustainable land use. Currently, Solidaridad Network is working with the Dutch Embassy on a gardening project in urban areas in Ghana.

AgDevCo - This international NGO works in Ghana, targeting early-stage agribusinesses and supporting management to scale profitable business models. It works with other local NGOs and partners to provide financing. For instance, AgDevCo is providing financing to help the Babator Farming Company expand its feedlot and livestock operations.

Agriterra - Agriterra focuses on strengthening farmers' cooperatives and organisations. In Ghana, they provide expertise and advice on business development, financial management, and improve the overall efficiency of agricultural cooperatives in the horticulture sector. For example, Agriterra has provided long term organisational support to the Agogo Ginger Outgrowers and Marketing Association.

CHAPTER 3: HORTICULTURE SECTOR IN GHANA

3.1 OVERVIEW OF GHANA'S HORTICULTURE SECTOR

Ghana's favourable climate for horticulture, has allowed both tropical and temperate crops to be cultivated in various parts of the country, and the sector is made up of production, distribution, and sale of seeds, fruits and vegetables. Recent research suggests that the country's horticultural sector and production systems is dominated by crops such as pineapple, mangoes, bananas, oranges and exotic vegetables, which are mainly grown for export.³⁴ The sector is dominated by smallholder farmers, farmer groups/cooperatives and mostly on small to medium scale productions. For instance, about 90% of farm holdings are less than two hectares in size, contributing to small scale production.

Vegetable production in Ghana is produced mainly on smaller plots of land of less than one hectare.³⁵ The average farm size for tomatoes, onion, and Scotch Bonnet is 0.66 ha, 0.42 ha, and 0.36 ha, respectively. The main system of farming is traditional where hoe and cutlass are the main farming tools. However, there are also institutions, (over 58% from last census) who

are producing horticultural crops on large-scale.³⁶ These large farms particularly for bananas, coconuts and to a lesser extent, pineapples are located mainly along the coastal savanna and rainforest zones in the southern part of the country.

Key fruits and Vegetables: Pineapple, orange, mango, pawpaw, and banana are popular fruits produced in Ghana. The major vegetables grown include tomatoes, onions, and chilies. There is a difference in crop mix and area cultivated across the major agroecological zones. Tomatoes, chilies, and mangoes are grown in all agroecological zones. Onions and shallots are mostly grown in the forest transition savannah zone (FTSZ) and guinea savannah zone (GSZ). Pineapple is mainly grown in the coastal savannah zone (CSZ), the Central, Eastern, Greater Accra, and Volta regions, where the climate is favourable for fruit production. Mangoes and oranges are grown in the Transitional and Forest zones respectively. According to figure 3.1 and 3.2, oranges are the most produced fruits in 2020 and 2021, closely followed by pineapples, tomatoes, chilies, onions and shallots.

Table 3.1: Quantity of major fruits and vegetables produced in Ghana, 2021-2022 (in Mt)

| FRUITS | YEAR | | VEGETABLES | YEAR | |
|----------------|-----------|-----------|---------------------|-----------|-----------|
| | 2021 | 2022 | | 2021 | 2022 |
| Pineapples | 680277.37 | 678079.15 | Tomatoes | 383720.72 | 382246.58 |
| Oranges | 696363.54 | 696925.12 | Onions and Shallots | 150294.59 | 151426.17 |
| Mango | 102283.21 | 102993.7 | Chillies and pepper | 119640.89 | 119599.39 |
| Banana | 107904.3 | 109873.86 | | | |
| Pawpaw/ papaya | 5644.69 | 5652 | | | |

Source: FAO, 2022;2023

The other key inputs for horticulture production include:

Seeds: Farmers in Ghana obtain their seeds and planting materials through either informal or formal seed systems. The seed system is dominated by imports, with over 90% of vegetables and ornamental seeds sourced from international companies. Some of these include European (mainly Netherland) companies like

East-West Seed, RijkZwaan, Syngenta and Technisem that supply seeds sometimes through local subsidiaries in Ghana.³⁷ Key imported seeds include tomatoes, onions, cabbages, cucumbers, lettuce, and carrots. Under the formal seed system, farmers obtain their seeds and planting materials, whose traits and quality have been certified through a rigorous regulation by national and international institutions such as the

³⁴Egyir et al., 2022

³⁵(Van Asselt et al., 2018)

³⁶(GSS, 2020)

³⁷(Ragasa et al., 2018)

Ghana Seed Inspection Division (GSID) at Ministry of Food and Agriculture (MOFA), the Crop Research Institute (CRI), and International Seed Testing Association (ISTA) through the Global Quality and Standards Programme (GQSP). There is also the central government, through the Ministry of Food and Agriculture, which has also been supporting seed production programmes through the Planting for Food and Jobs programmes (PFJ). Under the programmes, 4,400MT, 6,821MT, and 9,724 MT of seeds were produced in 2017, 2018 and 2021 respectively³⁸. In 2022, the Ministry distributed 18,954 MT of improved seeds to farmers. Also, under the programme, farmers were supplied with 24MT and 27MT of vegetable seeds in 2020 and 2022 respectively. The Council for Scientific and Industrial Research (CSIR) - Ghana has played a key role in the development of novel tomato cultivars. Kwabena Kwabena, Kopia, Shito pepper var. Adope, and Mako pepper var. Ntose are some of the varieties released to farmers. Other varieties of tomatoes grown in Ghana are Pectomect,

Power Roma and Techiman for instance. Common fruit varieties include Sugarloaf, MD2 and Smooth Cayenn (for Pineapples), Kent, Keitt, Springfield and Amelie (Mango) and others for banana (see Table 3.1).

Outside the formal supply systems, farmers also use informal sources/ systems to source seeds. In this case, farmers save seeds and planting materials from their crops, collect seeds from neighbour's seed stands or high performing trees, and purchase seeds and planting materials from non-regulated local seed producers and traders. Examples include local open-pollinated vegetables as well as varieties such as Pectomect, Power Roma and Techiman (for tomatoes) and Legon 18, Scotch bonnet for Chilli pepper. Overall, the main sources of seeds in the horticulture sector remain both formal and informal. The formal is used more in the fruit sector while more vegetable farmers rely on formal sources for their seeds.

Table 3.2: Examples of key seed varieties

| Seeds |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fruit Seeds |
| <ul style="list-style-type: none"> • Sugarloaf, MD2 and Smooth Cayenn (Pineapple crowns/suckers) • Kent, Keitt, Springfield and Amelie (Mango) • Banana (Cavendish, Mysore (Alata kwadu, local variety), and Gros Michel) |
| Vegetable Seeds |
| <ul style="list-style-type: none"> • Open-pollinated seeds made up of indigenous vegetable varieties and hybrid seeds • tomato (Kwabena Kwabena, Kopia, Shito pepper var. Adope, and Mako pepper var. Ntose, Pectomect, Power Roma and Techiman • onion (Bawku Red and Galmi) • cabbage, • lettuce, carrot, cucumber, • pepper, and eggplant hybrid seeds |
| Others |
| <ul style="list-style-type: none"> • Chilli peppers (Legon 18, Scotch bonnet, Bird's eye, Demon, and CRI Shito Adope) |

Fertilizers and agrochemicals: Within the horticulture value chain in Ghana, the main chemical inputs are fertilizers and pesticides. It is estimated that more than 70% of vegetable farmers use insecticides for pest control and nearly all vegetable farmers use chemical fertilizers in vegetable production. Imports of inorganic

fertilizers for agriculture in Ghana have been rising, with the country being the largest importer of fertilizer in West Africa in 2020 with 26% of all imports. Ghana's imports of all types of fertilizers were \$173 million in 2019, \$109 million in 2020, and \$79 million in 2021.³⁹ Also, official fertilizer imports for NPK, urea,

³⁸<https://mofa.gov.gh/site/programmes/pfj/68-pfj/pfj-publications/332-planting-for-food-and-jobs-pfj-is-the-way-to-good-harvest-walk-it>

³⁹<https://www.trade.gov/market-intelligence/ghana-fertilizer-market>

phosphates (TSP), muriate of potash, ammonia sulphate, nitrates, and potassium sulphate to Ghana (all of which are relevant to the horticulture sector) increased by 103% from 2021 to 2022.⁴⁰ Fertilizers are imported into Ghana from some parts of Africa, Asia, and Europe. In 2022, the top ten sources of fertilizer imports into Ghana were Belgium, Morocco, Norway, China, Russia, Spain, the USA, Vietnam, Nigeria, and Switzerland (AfricanFertilizer.org, 2023). Prices of fertilizers have seen quantum leaps in the past 2 years owing to the Russia-Ukraine war and other supply chain disruptions attributed to the COVID-19 pandemic, resulting in high input costs for farmers, particularly those in the horticulture value chain. Interview respondents indicated that the price of fertilizer had moved from 50 GHS (€4.07) to 450 (€36.6) in less than 2 years.⁴¹ Government of Ghana programmes such as the Fertilizer Subsidy Programme (2008-2018) and Planting for Food and Jobs are among the primary drivers of rising fertilizer imports and have been used to address rising costs of fertilizers on the market. The government provides a 50% subsidy on fertilizer prices, which are

regulated seasonally with the agreement of Importers⁴². However, interviews with both large-scale and smallholder farmers indicate that both central and local politics influence the distribution and targeting of subsidies to farmers, including those in the horticulture sector⁴³. Participants in the FGDs indicated that farmers who are members of ruling political parties and local executives of the ruling party are often prioritised and favoured in accessing seeds, suckers and subsidies or fertilizers distributed under the PFJ, resulting in high production costs for non-ruling party affiliated farmers⁴⁴. Hence, there is need for strong advocacy by cooperatives, unions and private sector for the establishment of transparent processes for accessing subsidies from government in the agric sector.

“the cost of inputs have gone up. Last two years, the NPK 15-15 (50kg) was only GHS 90 but currently it is about GHS 450, which has increased the cost of operations astronomically.

Table 3.3: Fertilizer imports

| Fertilizer name | 2018 | 2019 | 2020 | 2021 | 2022 |
|---------------------|----------------|----------------|----------------|----------------|----------------|
| NPK | 224,176 | 217,024 | 299,423 | 152,267 | 272,106 |
| Ammonium sulphate | 10,084 | 17,326 | 43,994 | 32,561 | 77,737 |
| MAP | 6,540 | 18,102 | 47,966 | 0 | 30,722 |
| Urea | 42,005 | 77,011 | 89,956 | 3,800 | 24,505 |
| TSP | 9,460 | 29,300 | 35,268 | 0 | 21,900 |
| MOP | 15,993 | 42,235 | 55,611 | 15,329 | 10,941 |
| Organic fertilizers | 5,875 | 4,673 | 270 | 2,495 | 1,877 |
| Other fertilizers | 1,024 | 196,440 | 46,151 | 32.61 | 46,415 |
| Total (mt) | 315,157 | 425,110 | 618,638 | 239,062 | 486,203 |

Also, institutions such as the Environmental Protection Agency (EPA) and the Pesticides and Fertilizer Regulatory Division of the Ministry of Food and Agriculture (MoFA) are responsible for the registration and issuance of permits for pesticide use. The volume of pesticide imports decreased from 43,396 MT in 2016 to 37,611 MT in 2020. Individual farmers can go on the open market to buy and apply chemicals to prevent pests and insects from destroying their crops. Wholesalers usually have the import licence from the EPA and retailers subsequently sell directly to farmers.

However, there are gaps in training of farmers on the right application of these pesticides, which could lead to over or underapplication.

Irrigation: Due to the seasonality of Ghana’s climate, irrigation is critical in vegetable production particularly in the Northern, Upper East and Volta regions, where gravity-fed systems dominate, and are supplemented by motorized pumping systems. Majority of the irrigation schemes are farmer-led and informal. However, major public irrigations schemes include Kpong in

⁴⁰<https://api.hub.ifdc.org/server/api/core/bitstreams/38f8febe-451a-4b9a-af6b-9fb53f296918/content>

⁴¹Interviews with Golden riverside; interview of Hydrotech; interview with YiloKrobo Mango cooperative; FGD Akwapim South

⁴²Pauw 2022; A review of Ghana’s planting for food and jobs programmes: Implementation, impacts, benefits, and costs. Food Security, 14(5), pp.1321-1335.

⁴³Interview with outgrower for Golden riverside Limited

⁴⁴FGD, Akwapim South

Eastern region, Vea and Tono Irrigation in the Upper East region where gravity-systems and irrigation pumps are used for vegetable production such as Tomato, onion, and scotch bonnet. There is also irrigated urban vegetable production particularly in cities such as Kumasi and Accra, where there has been increased use of wastewater for irrigation during dry seasons, with major public health implications to farm workers/labourers and the consuming public.⁴⁵

Greenhouse Technology: Few farmers also use greenhouse technology for cultivation, particularly in vegetable cultivation. This technology has been progressively promoted since 2007, when the Export Marketing and Quality Awareness Project was launched under the Ministry of Food and Agriculture (MoFA) and introduced in 2017 to increase productivity and ensure a sustained supply of vegetables throughout the year, and for supply to exporters. This technology also provides employment and training, for instance for training youths in greenhouse vegetable production under the Government of Ghana's Greenhouse Villages project. Three greenhouse centres owned by the Ministry of Food and Agriculture in Ghana were built in Akumadan (14,440 m²) in the Ashanti Region, Bawjiase (14,440 m²) in the Central Region, and Dawhenya (38,260 m²) in the Greater Accra Region. The crops produced under this technology include tomato, cherry tomato, cucumber, sweet pepper, and hot pepper (Habanero), with some already supplied to local outlets such as Shoprite (Accra), Eden Tree and The Farmer's Market (Tema).⁴⁶ Also, companies such as Dizengoff Ghana and Agric-Impact Group (AIC) promoted the adoption of Green Technology in Ghana with donations from World Bank through the West Africa Agricultural Productivity Programme (WAAPP), West and Central African Council.

3.2 IMPORTS, EXPORTS AND FORMAL SUPPLY CHAINS

The horticulture sector in Ghana offers great opportunities for economic growth due to strong export market potential and growing domestic demand. This has often been done through formal and institutional arrangements via land, air, or sea freight, with regulations. Ghana also relies on imports for seeds, fertilizers, and pesticides used in horticulture production, with over 90% of vegetable seeds and the bulk of fertiliser imported yearly into the country (see Tables 4.1 and

4.2). It is estimated that the value of Ghana's agricultural and related imports was \$2.4 billion as of 2022, supplying many agricultural products and horticultural produce like pineapple, mangoes, tomatoes, onions and other tropical fruits, with products often distributed through formal retail chains like Shoprite, Koala, and MaxMart targeting middle- and upper-income consumers (GEPA, 2020; Konfidants, 2021).

Key import countries include China (processed tomatoes), Spain, Thailand (Pineapples), Niger (Onion), South Africa, Italy, and the Netherlands (apples and pears). The import value chain (fruits, vegetables, seeds) is formalised, regulated under the Ministry of Food and Agriculture (MoFA) along with agencies like and the Ghana Standards Authority, Food and Drugs Authority (FDA), the Customs Division of the Ghana Revenue Authority, the Ministry of Trade and Industry, Ghana Export Promotion Authority, Ghana Freezones Authority and working freight forwarders and consolidation agents who arrange transportation from source markets.

The export-oriented supply chains in the horticulture sector are characterized by formal and informal practices. Formal exporters or companies are mainly locally and sometimes internationally certified by (e.g. GLOBALG.A.P, LEAF and Fairtrade and Food and Drug Authority (FDA) certification) and have workers who work on their farms as contracted outgrowers who produce products to be processed and exported. Informally, there are also vertical coordination between smallholder farmers and exporting and processing companies.⁴⁷ This is usually based on loose agreements in terms of produce and pricing, but in the form of input provision or involvement in the de-greening and harvesting processes by the buyers, and by providing technical assistance to outgrower farmers meeting international quality standards. These loose arrangements could put farmers and their workers at risk in the event of uncertainty.

Key exported products that are produced under the outgrowing farming schemes for exports include fruits such as pineapples, mangoes, and vegetables like tomatoes and onion. Major destinations for exports are Europe (UK, the Netherlands), regional markets in Africa (Togo, Benin, Cote D'Ivoire), and the Middle East (Lebanon, Kuwait). For instance, Ghana exported a

⁴⁵Antwi-Agyei et al, 2016. A faecal exposure assessment of farm workers in Accra, Ghana: a cross sectional study

⁴⁶<https://neip.gov.gh/greenhouse/>

⁴⁷Interviews with farmers in Akwapim south; Interviews with Yilokrobo Mango cooperative

total of US\$29m worth of fresh or dried pineapples in 2021, with almost 85.8% of the total exports going to the EU market. Belgium absorbed close to 34.6% of the total exports in 2021.⁴⁸

Led and coordinated by government institutions such as the Ghana Export Promotion Authority (GEPA) under the Ministry of Trade, the export supply chain in the horticulture sector is again characterized by formal coordination between producers, processors/packers, exporters, and overseas buyers. Products like pineapples, mangoes, and vegetables for airfreight are sourced from commercial farms and plantations with sizable land holdings, capital investments, and infrastructure like irrigation and pack houses to international markets particularly in Europe (see Table 3.3). Within the contract farming arrangements also, common ways of linking some smallholder farmers to export companies include providing inputs, standards training, and market access in return for fresh fruits and vegetable supply from farms.⁴⁹

Farmers also receive payments for their produce after a minimum of 2- 6 weeks with initial down-payments, or immediately after harvest often based on agreement.⁵⁰

Private sector participation in the export of fruits and vegetables is increasing in Ghana. There are companies that are involved in processing for the export as well as the local market and those producing solely for the local market. Companies and individuals like AB Farms Ltd, A.T. Mahli Farms Ltd, Agrigold Resource Development Ghana Limited, Akafad-Pa Company Limited, Albe Farms Limited, Albert Agbeko, Albert Mills Agbeko, Alexandr Atuobi, Alhaji Awudu Karim Enterprise Ltd, and Ayaawan Harrison are involved in the export of multiple products within the horticulture value chain. Other Key firms exporting horticulture sector products from Ghana include Blue Skies, HPW Fresh and Dry Ltd., Bomarts, Golden Exotics, Volta River Estates Limited, Peelco, Agri Commercial Services, Golden Riverside Limited and Pinora. They deal mainly with high-value fruits and vegetables where air-freight costs can be covered. (see Table 3.3)

Table 3.4: Produce/ exports by some selected companies in Ghana.

| Name | Type of produce ed and exported | Main market destination | Total finished products (tonnes) | Aspect of value chain operated |
|---------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------|----------------------------------|-----------------------------------|
| Blue skies Holding Ltd | Pineapples, banana, passion, mango, pomegranate, orange | Local and international (UK, The Netherlands, France, Switzerland, Italy) | 26,322 | Production, processing and export |
| Frutelli Ghana Ltd | Fruits; mango, pineapple, orange, and cocktail flavour | Local and international | 250 tonnes per day | Processing, export |
| Bomart Farms | Dried Mango, Dried Pineapple Dried Banana, Dried Coconut | Local and international (EU-Germany, Switzerland, Belgium, Italy and UK), Israel and Lebanon) | - | Production, Processing and export |
| Pinora Food Processing Company | Fruits; pineapple, orange, lime | Local and international (Europe and West Africa) | - | Processing, Exports |
| HPW Fresh and Dry LTD. | Dried mango, Pineapple, coconut | Local and international (Europe, US) | Over 2000 tons | Production, Processing, exports |
| Volta River Estate Limited | Banana | International (UK, Belgium) | Over 10,000 tons | Production, exports |
| Golden Exotic Limited | Banana | International (France, Belgium, Italy, Senegal) | 86,376 tons | Production, exports |

⁴⁸<https://www.gepaghana.org/cms/wp-content/uploads/2022/07/Pineapple-competitor-report.pdf>

⁴⁹Interview with outgrowers at Dumpong and Apretem; interview with Hydrotech and Golden riverside managers

⁵⁰In depth interview with outgrowers at Dumpong and Apretem; interview with Hydrotech and Golden riverside managers;FGD_Akwapim South

Regionally, Ghana's proximity to landlocked Sahelian countries enables key horticultural exports. Ghana exports pineapples, mangoes, and vegetables over land informally to neighbours like Burkina Faso and Togo. In turn, onions, and tomatoes are imported from Sahelian countries like Niger, Burkina and Mali into Ghana. These imports and regional commerce from the Sahel are hindered by poor road networks, and the market pricing. This is because pricing across the supply chain is mostly driven by market forces of supply and demand rather than set by specific actors per se. However, the supply chain is somewhat formalised, with customs checks and the Ministry of trade and Industry which often set tariffs and levies on imports, and sometimes help determine price markets. Overall, both the import and export value chains are characterised by different levels of formality and informality. There is need for capacity development, advocacy and dialogue aimed at formalising relations among actors and reducing the depth of informality to reduce vulnerability of individual smallholder farmers and outgrowers while improving economic situation of farmers and other actors within the supply chain.

3.3 LOCAL, DOMESTIC, AND INFORMAL SUPPLY CHAINS

Ghana's horticulture trade involves complex formal and informal supply chains connecting rural smallholder farms to urban markets nationally. There are middlemen who transport fresh produce by truck from rural farming areas to urban wholesale markets like Agbogbloshie, Ashaiman, and Makola in Accra, Kejetia Market in Kumasi etc where produce is sold to retailers and street food vendors, and operated by market queens.⁵¹ Despite the expansion of formalisation and formal sector actors and programmes such as GhanaVeg, 1 District 1 Factory, VEGPRO Group and HortiFresh, much horticulture trade in Ghana remains informal, with an estimated 80-90% of consumed domestically, passing through informal channels from smallholder farms to consumers.⁵² Smallholders with just 1-5 hectares produce a range of fruits, vegetables, and staple crops, using family labour and minimal mechanization.

Also, the majority of farmers produce exclusively for the local fresh market, selling their produce to market women who supply to end-consumers⁵³ (though their prices tend to be lower and unpredictable). There are also others, particularly in the fruit sector, who supply about 30% or a small fraction of farm produce to local juice producers and sellers.⁵⁴ This is because the private or exporting companies provide ready markets and competitive pricing than local markets.⁵⁵ However, there is sometimes informality in farm and market pricing, for outgrowers or smaller farmers who are contracted by exporters or buyers, and their arrangements/ contracts often based on loose agreements, with limited to no binding contractual documentation.⁵⁶ There is currently no union or centralised association who negotiates to set prices for farmers, and contracts are mainly based on either verbal or written informal agreements.

Similar to the imports-exports oriented value chain, the local market are also dominated by aggregators, and post-harvest handling in this space is manual, with little sorting, grading, cold storage or value-addition before produce is transported. The aggregators, or middlemen serve as intermediaries between farmers and diverse off-takers; for instance, in the mango sector, close to a third of farm-to-market transactions are coordinated by market intermediaries.⁵⁷ Rural aggregators assemble and transport unprocessed mixed crops by public transport or pickup trucks to urban wholesale markets.⁵⁸ Wholesalers then sell to retailers and street food vendors in open air markets or along roadsides.⁵⁹

Apart from production, some processors are gradually developing, and have merged into the local market for processed fruits and vegetables. Indeed, the explosion of syrup-based flavoured fruits drinks in Ghana, at the turn of the current millennium aided the growth of the domestic market for processed fruits. Over the years, the domestic market-oriented fruit processing industry has expanded from drinks to dried products, among others, supplying to restaurants, hotels, pubs and retail shops in the country. Though the installed capacity of

⁵¹Abass et al., 2016

⁵²<https://www.rvo.nl/sites/default/files/2021/05/Ghana-Food-Manufacturing-Study.pdf>

⁵³Interviews with farmers in Akwapim south

⁵⁴Interview with farmer in Dumpong

⁵⁵Interview, Yilo Krobo mango growers association

⁵⁶Interview with outgrower at Aprentem

⁵⁷Interview, Yilo Krobo mango growers association

⁵⁸Interview with former executive of Yilo krobo mango growers association

⁵⁹Interview with former executive of Yilo krobo mango growers association

some of these companies are large they are only able to process between 1-15 tons of pineapple per week with most processing between 1-2 tons per week. The processing volumes of these companies are low from lack of storage facilities to hold fruits for a while before processing, lack of efficient machinery and limited working capital. They also have challenges with access to bottles for juice packaging.⁶⁰ The recent introduction of different international and government interventions such as One District One Factory and

HortiFresh etc, with domestic-oriented processing segment comprising about 60 companies has contributed to the increase in the fruit processing capacity, about 20% of the fruit juice market.⁶¹ Key examples include Ekumfi Juice, Fruittelli, Fruittland Company Limited, Bodukwan Farms Limited etc. mainly Small-scale processors are members of Fruit Processors and Marketers Association of Ghana (FPMAG).

⁶⁰GEPA (2022) Market Study and Value Chain Analysis of Processed Fruits (Mango & Pineapple) in the West Africa Sub-Region

⁶¹Interview with GEPA official

CHAPTER 4: ORGANISATION OF THE HORTICULTURE SECTOR

4.1 IMPORTANCE OF HORTICULTURE SECTOR FOR GHANA: KEY PRODUCTS, TRADE FLOWS AND EMPLOYMENT

Horticulture is significantly contributing to the Ghanaian economy through exports, providing food security, and nutrition while providing income opportunities for millions of smallholder farmers and value chain actors.⁶² Ghana's non-traditional exports (NTEs) including horticultural crops like fruits and vegetables reached a total of USD 3.53 billion, representing a growth of 6% and contributing 20.22% to total merchandise exports. The agricultural sector, which horticulture is part of, contributes to about 20% of GDP⁶³ and also about 45% of the total workforce (formal or informal).⁶⁴ It is also estimated that the sub-sector contributes 1-3% directly to the country's GDP and provides employment.

4.1.1 HORTICULTURAL EXPORTS:

Horticulture exports were approximately \$214 million in 2019, up from \$186 million in 2018⁶⁵. Over the last three years, Ghana's total fresh fruit exports have decreased but overall fruit and vegetable exports increased. Between 2019 and 2020, the volume of orange and pawpaw exported increased by 211.8% and 149.7%, respectively (Table 4.1). Exports of pineapples, bananas, and mangoes, on the other hand, fell by 76.7%, 18.2%, and 96.1%, respectively (Table 4.1). This was particularly due to covid-19 and the associated air freight disruptions and slow or even declining demands in the European market.⁶⁶ Despite the impact of CoVID-19, the export of onions, chili and tomato increased respectively (Table 4.1).

FRUITS

The key fruits exports in Ghana include:

Orange: Between 2019 and 2020, the volume of orange exported increased by 211.8% (Table 4.1). In

general, orange exports continue to indicate a resilient increase, with Cote d'Ivoire, The Netherlands and Burkina Faso being the key foreign market for oranges exports from Ghana. Cote D'Ivoire and Burkina Faso comprise 91% and 6.3% share of total exports respectively. Key orange exporters in Ghana include mainly local farmer groups who sale to aggregators for export to neighbouring countries and some also processed and exported by companies such as the EKumfi Juice Factory, Frutelli Ghana Ltd, Blue Skies Holdings Ghana among others.

Pineapple: Ghana's exports of pineapples fell by 76.7% in 2020 but the market value increased at an average annual rate of +2.3% over the period from 2012 to 2022. Key destination for pineapple exports from Ghana include EU (France, Switzerland, Belgium) and, together accounting for 48% of total exports. From 2012 to 2022, the biggest increases in exports were recorded for Switzerland (with a CAGR of +19.8%), while shipments for the other lead countries experienced more modest paces of growth. Other EU countries such as Belgium and the Netherlands are also on the scale. For instance, Ghana exported a total of US\$29m worth of fresh or dried pineapples in 2021, with almost 85.8% of the total exports going to the EU market. Belgium absorbed close to 34.6% of the total exports in 2021. Key exporters to the EU markets include Golden Exotics Limited, Chartered Impex Limited, AB Farms, Blue Skies, HPW. About 10% of the total volume of pineapples purchased from farmers for processing do not retain the required quality by time of processing and are discarded as Postharvest loss (PHL).⁶⁷

Mango: Ghana's export of Mangoes grew by 28% between 2020 and 2021, according to GEPA. The total value of exports in 2021 stood at USD 64.6 million compared to USD50.3 million in 2020. Ghana ranked 11th in the order of countries that exported mangoes

⁶²(FAO, 2020)

⁶³ <https://www.gepaghana.org/ghanas-horticultural-catalogue/#:~:text=The%20sector%20currently%20provides%20employment,the%20formal%20and%20informal%20sectors.>

⁶⁴<https://www.gepaghana.org/ghanas-horticultural-catalogue/#:~:text=The%20sector%20currently%20provides%20employment,the%20formal%20and%20informal%20sectors.>

⁶⁵(GEPA, 2020)

⁶⁶GEPA (2022) Market Study and Value Chain Analysis of Processed Fruits (Mango & Pineapple) in the West Africa Sub-Region

⁶⁷GEPA (2022) Market Study and Value Chain Analysis of Processed Fruits (Mango & Pineapple) in the West Africa Sub-Region

Table 4.1: Export of Fruits and Vegetables in Ghana (2019-2021)

| Commodity | Volume (Tonnes) | | | Value (\$000) | | | 2021 Total volume and value exported kg, (US\$) |
|---------------------------------|-----------------|------------|---------------------|---------------|-----------|----------------------|-------------------------------------------------|
| | 2019 | 2020 | % Chang (2019-2020) | 2019 | 2020 | % Change (2019-2020) | |
| Fruits | | | | | | | |
| Pineapples | 18,992,351 | 4,427,318 | -76.7 | 51,174,151 | 5,786,740 | -88.7 | 9,464,942 |
| Bananas | 97,424 | 79,732 | -18.2 | 32,582,000 | 67,296,00 | 106.5 | 35,567,549 |
| Mangoes | 20,013,322 | 778,273 | -96.1 | 67, 217,484 | 4,140,802 | -93.8 | 19,507,483 |
| Pawpaw | 1,453,589 | 3,629,581 | 149.7 | 5,130,300 | 3,515,119 | -31.5 | 734,061 |
| Oranges | 1,660,975 | 94,200,000 | 211.8 | 10,122,513 | 3,222,077 | -68.2 | - |
| Vegetables | | | | | | | |
| Onions | 568283.1 | 1,197,071 | 110.6 | 669,424.6 | 872,688 | 30.4 | - |
| Pepper (Chili) | 2 | 47 | 2250 | 2,000 | 105,000 | 5150 | - |
| Tomato | 10,356 | 11,013 | 6.3 | 6,657 | 6,656 | 0 | - |
| Exotic | - | - | - | - | - | - | 22,031,332 |
| Vegetables (e.g. chilli pepper) | | | | | | | |

Source: GSS; 2022, GEPA, 2022, NDPC, 2022

to the world in 2021. The major 4 importing countries are in Western Europe comprising UK, Germany, Switzerland and Belgium accounted for about 91.4% of total value of export of mangoes from Ghana. Aside Western Europe, Eastern Europe and the Levant, and South Africa are other top export destinations. The major potential global buyers include companies like Makro (UK), BetaFruit (Germany) and Central Dica (Spain). According to GEPA's data, there are over 33 mango exporters, of these, Ghana Volta River Estates, Eve-lyn Farms, Cotton Weblink farms, Dhillon Farms, John Lawrence, Tack Farms are major exporters of primary produce. With regards to export of processed produce, Ghana's mango processing industry is significant compared to its neighbouring countries. Ghana is competitive with exports of value-added produce i.e., fresh cuts, juice, and dried mangoes. Large scale export processors of mangoes include Blue Skies, Bomarts, Peelco and HPW among others. Most fruit juice processors in Ghana however are small scale processors with production capacity of less than 2 tons per day.⁶⁸

Banana: Banana exports has been increasing, with 2021 witnessing about 355, 676 tonnes (US\$) of total exports (see Table 4.2). There are currently two major producers and exporters of banana in Ghana: Golden Exotics Ltd. (GEL) and the Volta River Estates Ltd (VREL), both located in the Eastern Region, with some sites in the Volta region of Ghana. The two leading producers of bananas in Ghana are GLOBALGAP and Fair-trade certified.⁶⁹ With the 86,376.00 tons of banana including 23,300 tons being organic exported by the end of 2021, GEL remains the largest banana producer in Ghana accounting for over 70% of the national production. EU continues to be the largest destination for banana export. Ghana enjoys tariff-free and quota-free access to the EU market.⁷⁰ Other producers in the banana export value chains include Musahamat Farms Ghana Ltd located in the Volta Region of Ghana and Moonlight Fresco Ltd located in South Tongu, Ada East, and Ada West Districts. It is worth noting that aside the export of raw bananas, processors are also adding value by processing bananas into dry fruits for the purpose of exports or smoothies for supply to restaurants and street vendors on the local market.⁷¹

⁶⁸GEPA (2022) Market Study and Value Chain Analysis of Processed Fruits (Mango & Pineapple) in the West Africa Sub-Region

⁶⁹Banana from Ghana - GEPA Buyer Portal (gepaghana.org)

⁷⁰Banana from Ghana - GEPA Buyer Portal (gepaghana.org)

⁷¹FruitProcessingGhana_2021_online.pdf (hortifresh.org)

Table 4.2: Key export destinations

| Products | 1st leading Country | Volume exported in 2021 | 2nd Country leading country | Volume exported in 2021 | 3rd leading Country | Volume exported in 2021 |
|---------------------|---------------------|----------------------------|-----------------------------|-------------------------|---------------------|-------------------------|
| Pineapples | France | 2,052,562 (3,698,553) | Lebanon | 100,873 (158,632) | Switzerland | 97,649 (145,150) |
| Mangoes | UAE | 287,166 (871,260) | UK | 5,572 (655,006) | Kuwait | 96,935 (242,758) |
| Pawpaw | Cote D'Ivoire | 788,101 (3,100,502) | UK | 52,531 (143,846) | The Netherlands | 20,937 (107,666) |
| Oranges | Cote D'Ivoire | 6,502,700 (938,589,658) | The Netherlands | 93,860 (1,587,641) | Italy | 30,720 (411,765) |
| Onions and shallots | UK | 140,638 (476,903) | The Netherlands | 18,025 (94,302) | Cote D'Ivoire | 9,866 (52,836) |

VEGETABLES

Vegetable production has recorded year-on-year growth. Of the favourite vegetables produced, tomato production in particular has expanded significantly, recording a 23.3% growth from 317,000 tonnes (t) in 2012 to 395,755t in 2019. It also recorded over 360,000 tonnes in 2021.

The key vegetable exports include:

Tomatoes: Tomatoes are Ghana's largest horticulture product by volume, with 1.1 million MT produced in 2020.⁷² Ghana's tomato processing sector comprises of two segments, namely industrial and non-industrial. For exports, about 11,013 tonnes were exported in 2020 to key countries including Burkina Faso, Niger and United States. In terms of largest markets, the USA, Burkina Faso and Niger shared over 80% of total tomato exports. Also, as at 2021, about \$7.2M processed tomatoes were exported from Ghana to destinations such as Niger, Togo and USA.

Onions, and chilies are other major crops. Production of onions in Ghana on the rise, with over 521,254 metric tons of produced onions in 2021. The Main destinations for Ghana's onion exports are neighbouring countries like Togo, Niger, and Burkina Faso (OEC, 2019).

4.1.2 HORTICULTURAL IMPORTS

Ghana imported about \$1.9 billion in agricultural and related products in 2021⁷³, including horticulture products like vegetables, fruit juices and wine.

Key fruit imports are oranges (18,000 MT), apples (12,000 MT), and potatoes (11,000 MT) as of 2019.⁷⁴ This indicates gaps in domestic production. Over the years, major import countries for fruits are in Europe and specifically in countries such as Spain, UK, The Netherlands, South Africa, and the United States (see Table 4.3).

For vegetables, top imports include onions⁷⁵, tomatoes, and the key main exporters include Burkina Faso, Niger, Togo, China, South Africa, and the Netherlands. Also, processed and its concentrates are also imported into the country from countries such as Vietnam, Malaysia. This includes vegetables such as tomato concentrate, tomato juice, and paste imported from China. To evade the challenging of tomato sourcing, large processors engage in bulk imports of tomato concentrates. Here, processors dilute concentrates, and repackage them into tomato paste for the local and regional markets. Bulk importation of tomato concentrate is the largest source of input large processors, accounting for 93% of their inputs.

4.2 EMPLOYMENT IN THE HORTICULTURE SECTOR

The horticulture sector in Ghana provides direct employment for an estimated one million smallholder households and countless more informal traders, processors and retailers. This indicates horticulture's vital role in generating rural and peri-urban livelihoods through small-scale production, processing and

⁷²(FAO, 2022)

⁷³<https://www.trade.gov/country-commercial-guides/ghana-agricultural-sectors>

⁷⁴(Observatory of Economic Complexity, 2019)

⁷⁵Onion imports were 43,000 tonnes in 2019, indicating domestic production is not meeting local demand (OEC, 2019)

Table 4.3: Imports of Seeds, Fruits and Vegetables (2019-2020)

| Commodity | 2019 | | 2020 | | Five Top Countries |
|----------------------------|-------------|-------------|--------------|--------------|-----------------------------------------------------------|
| | Volume (Mt) | Value (Ghc) | Volume (Mt) | Value (Ghc) | |
| Pineapples, fresh or dried | 6,746.57 | 41,894.37 | 271 | 734 | Spain, UK, The Netherlands, South Africa, United States |
| Mango | 19525.75 | 38012.04 | 316.45 | 5,931.22 | Togo, UK, The Netherlands, UAE |
| Pawpaws | 5.33 | 35.52 | 2,790 | 42,012 | Lebanon, The Netherlands |
| Oranges | 92,066.84 | 207,606.13 | 358,772 | 797,270 | Spain, Egypt, South Africa, Morocco, France |
| Onions and shallot | 4,066,203.8 | 4,338,133.4 | 78,793,991.2 | 52,213,749.7 | Niger, UK, Morocco, The Netherlands, UAE |
| Tomatoes | 4,154,334.7 | 4,432,342.6 | - | - | Burkina Faso, The Netherlands, Italy, Morocco, Luxembourg |
| Tomato Seeds | - | 9460* | - | - | |
| Onion seeds | - | 3905* | - | - | |

*Data from FAOSTAT but in USD, and now converted to cedis (1USD= 5GHS as at 2019)
Source: GSS, 2022; FAO, 2022

marketing. Women make up over half the horticulture workforce in Ghana, dominating aspects like vegetable production, agro-processing, and street vending. Larger farms and agribusinesses in the horticulture sector may employ several hundred to several thousand workers. Blue Skies company, one of the large export processing companies, for example, employs about 5984 staff while also working with 1,200 outgrowers within the Eastern region of the country.⁷⁶ Equally, HPW employs 1000 staff directly and works with over 1400 outgrowers and farmers in Ghana and other neighbouring countries (see Table 4.4 below). It is worth noting that majority of workers and outgrowers in this sector remain unionized.

The horticultural sector also offers smallholder farmers improved livelihoods and access to services. High value markets within the horticulture value chains offer

farmers at least three times the unit price offered in low value markets such as roadside or local open-air roadside markets. Also, high value markets offer farmers the option of determining scale of production and ready market. Yet, absence of end to end cold chain in the post-harvest handling, processing or exporting of products often results in loss of quality. Thus deployment of storage and cold chain facilities remains critical for farmers to preserve the quality and shelf life of their products. Though, participation in high value markets by farmers in the sector provides an opportunity for farmers to maximize farm income through the high profits accrued to the high prices offered by these markets. However, employment within the sector is often casual and temporary on larger farms and ensuring access to decent work across the sector remains a major challenge.⁷⁷

Table 4.4: Employment by some selected giant companies

| Name | Total number of employees | Year | Union status |
|------------------------|---------------------------|------|------------------------------------------|
| Blue Skies | 5,984 | 2022 | No (but as Enterprise-based association) |
| Golden exotics Limited | 3325 | 2021 | Yes (GAWU & ICU) |
| HPW | Over 1000 | 2022 | Yes (UNEAGES) |
| Bomarts | Over 560 | - | Yes (UNEAGES) |
| VREL | 750 | 2023 | Yes (GAWU) |

⁷⁶(Blue Skies, 2022)

⁷⁷Interview with GAWU General secretary

4.2.1 EMPLOYMENT TYPES, PRACTICES AND DECENT WORK ISSUES

Three main types of employment are commonly practised along the horticulture value chain, particularly from production to processing and even exports. The type of employment contracts or arrangements in the horticulture sector have their own labour and decent work challenges.

Permanent workers/ staff: As the name suggests, these types of staff are permanently recruited, enjoy a fixed tenure of employment and associated defined conditions of service. Within the horticulture sector, permanent staff are usually few and are mainly those who occupy managerial and or technical positions within the value chains. For instance, in some of the medium and large-scale producers and processors, permanent staff included the farm managers and technical advisors, human resource managers and other critical managers. These staff, apart from their defined salaries, also enjoy medical insurance, accommodation (in some instances) and free feeding while at the production sites.⁷⁸ Common permanent staff categories identified in this study included administrative, company and farm management, packhouse staffs for companies such as Blue Skies, HPW, VREL etc, input and service supplier workers such as seed, agrochemicals and service companies. Analysis of the data for this study show that while some permanent staff in companies like VREL and GEL are unionised and affiliated to unions such as GAWU and ICU, majority are not affiliated to trade unions. Some indicated they were part of workplace-based associations which formed the basis for them to negotiate their conditions with employers in their respective industries.

Outgrowers and contract workers: These are not direct employments but exist as contracts between medium and large-scale processors and producers and workers. There are three main types of contracts and seasonal working arrangements that were identified within the horticultural value chains in Ghana.

i. Informal verbal agreements: This is often a loose pre-production/ before harvest agreement between farmers and buyers, and sometimes aggregators,

which is very common within the local and domestic supply chain. Under this arrangement, no contracts are introduced between farmers and processors/ buyers at the start of the season but rather based on loose and verbal agreements on production and sometimes fixes or agrees on the price at which farmers will commit to selling their crops. These are often dependent on relationships and trust, however there are several instances of misunderstanding and non-compliance. When this happens, violations often occur.⁷⁹ For instance, some farmers were noted to break these agreements to sell to the highest bidder (especially in time of higher demands) and based on what they deem favourable terms and price conditions.⁸⁰ This arrangement also offers small scale producers or small-scale farmers the flexibility of hiring additional support to help produce to meet set targets or draw on family labour when they can envisage higher demands.⁸¹ Within this arrangement, job security is very limited, if non-existent, particularly as labourers or family members hired or drawn upon for production are let to go after the production cycle. FGDs with farmers and workers indicates that small scale producers or small-scale farmers who operate under these types of arrangements are not members of cooperatives or associations and most have no information about trade unions.⁸² The lack of written contract with offtakers also increases their vulnerability to exploitation when there are glows in production, leading sometimes to loss of capital and disillusionment with the sector.

ii. Informal verbal agreement with resource commitment: Small scale producers or small-scale farmers often enter into this type of arrangements. In this case, the outgrower receives financial or input support from the offtaker for a guaranteed supply of fresh products at a pre-determined price. Where market women pre-finance the farmers, they insist on being the sole buyers of their products, which is sometimes bought at below market rates. The study noted frequent violations with this type of arrangement too.⁸³ For instance, some outgrowers reportedly often sold their products to the highest bidder despite receiving inputs from the offtaker.⁸⁴ This situation often occurs when market prices are higher

⁷⁸Interview with farm managers of GRL, Hydrotech, VREL among others

⁷⁹Interview with farm manager of the Golden riverside limited; Interview with cooperative executive.

⁸⁰FGD with Adonten pineapple farmers; FGD with Yilokrobo mango growers' association

⁸¹Interview with farmer in Pokrom; Interview with outgrower at Aprentem

⁸²FGD with Adonten pineapple farmers; FGD with Yilokrobo mango growers' association

⁸³Interview with farm manager of the Golden riverside limited, Interview with cooperative executive.

⁸⁴Interview with farm manager of the Golden riverside limited; interview with former executive of Yilo krobo mango farmers association.

than the agreed price with the offtaker. Most of these farmers/outgrowers have low level of education and limited understanding of contract and capacity to negotiate favourable terms and conditions.⁸⁵ As such some advocates for farmers/outgrowers such as farmer groups or cooperatives, non-governmental organisations and donor funded programmes have been providing capacity building to upgrade farmers skills to negotiate for better terms and conditions. For example, UNIDO was reportedly training smallholder pineapple farmers to keep proper records of their cost to enable them to negotiate for adequate prices for their produce.⁸⁶ Also, farmers who belong to associations are often assisted by their executives to negotiate better terms and conditions.⁸⁷ Institutions like USAID, the Millenium Development Authority (MiDA) and GIZ had previously provided some level of bookkeeping and training on recording chemical applications for outgrowers in the pineapple, mango and vegetables value chains in the Greater Accra and Eastern regions respectively.⁸⁸ FDGs with both management of enterprises, outgrowers and associations/ cooperatives indicated that majority of these outgrowers belonged to area-based cooperatives and associations but not trade unions.⁸⁹ While some indicated interest in being affiliated with trade unions, some preferred to engage with offtakers through the associations and cooperatives (sometimes formed by the large-medium companies themselves, e.g. Being the blue skies cooperatives of pineapple producers.⁹⁰

iii. Workers and Farmers in 'Resource-providing contracts' arrangements:⁹¹ Farmers (mainly commercial/ larger farmers) with this type of contract usually obtain planting material, chemical inputs, other production tools, and technical support on credit from the contracting company, and either hire farmers or group of farmers to work as part of their (commercial) plantation. Training is often geared towards supporting the farmers to meet the production requirement rather than to build their overall capacity for growth and sustainability.⁹² Farmers

in this arrangement agree to adhere to precise production methods and input regimes. The credit is paid back through a share of the harvest and the commitment to sell to the contracting company. This form of contract is popular in the fruit sectors compared to the vegetable areas. Respondents in the mango and pineapple companies and outgrowers confirmed that the processors and exporters made commitments to provide them with inputs, plough and till the land and support the application of chemicals as well as harvesting. These contributions were quantified and deducted at source before the remaining resources are provided to farmers after the harvest and sales. Where financial support is provided, the companies are flexible and only apply the deduction when the harvest is good and the farmer will have a reasonable return on investment from the available harvest. In respect of the vegetable sector, farmers used their own resources to plan and apply chemicals at critical points in the farming season. Within this arrangement, farmers are quick to let go non-permanent staff after production ends. Similarly, technical persons contracted to help coordinate the whole production process, from land preparation, cultivation, spray, harvesting and post-harvest packaging are laid off after the harvest and export. This arrangement is beneficial to both farmers and processors/ companies. The processor/ exporter gets a guaranteed supply of fresh tomato/pineapples/mangoes at a pre-determined price that makes processing competitive with imported processed products. Farmers, on the other hand, are offered a fixed price which reduces uncertainty, which enables them to make production decisions based on the price. Discussions with outgrowers and producers indicated that majority of outgrowers and farmers with this type of contract mostly belonged to area-based cooperatives and associations but not trade unions.⁹³ Interviews with individual outgrowers show they had no objections being affiliated with trade unions, via their cooperatives and associations. They confirmed that through their cooperatives, they benefited from training on application

⁸⁵Interview with executive of Adonten cooperative; interview with outgrower at Dumpong; interview with outgrower in Aprentem

⁸⁶Interview with GEPA official

⁸⁷Interview with Adonten cooperative executive; FGD with Adonten cooperative; interview with former executive of Yilokrobo mango farmers association

⁸⁸Interview with executive of Yilokrobo mango farmers association; FGD with Adonten Pineapple cooperative

⁸⁹FGD with Adonten pineapple farmers; FGD with Yilokrobo mango growers' association.

⁹⁰FGD with Yilokrobo mango farmers; interview with outgrowers for Golden riverside limited at Aprentem.

⁹¹FGD with Adonten pineapple farmers; FGD with Yilokrobo mango growers' association.

⁹²FGD with Adonten pineapple farmers; FGD with vegetable farmers in Okushibiade; FGD with Yilokrobo mango growers' association.

⁹³FGD with Yilokrobo mango farmers; interview with outgrowers for Golden riverside limited at Aprentem.

of chemicals and better records keeping.⁹⁴ They indicated that if they were to join trade unions, then they had to get clear services which would supersede what the cooperatives were providing currently.⁹⁵

By-day labourers/ Casuals: As the name suggests, these are often labourers who are employed to take part in farming, harvesting, sorting and other pre-export activities when their services are required, and there are mainly no contractual obligations beyond the payment of wages after the delivery of services. There are different forms of casuals. For the large companies that engage in processing, sorting and packaging of fruits and vegetables, most casuals, mainly women, are employed for an average period of five months and made redundant thereafter to comply with the requirements of the labour law. Usually, most of the released casual staff are recalled to commence another cycle if their services are needed in the company.

Outside of this form of casual labour, there are casual farm labourers who make their services available as and when they are available and also based on the demands of employers and farm owners. More than 95% of workers/ labourers are non-contract farmers. Interviews show that majority of casual labour on farms undertake weeding of farms, pruning of trees, application of fertilizers and pesticides as well as harvesting of fruits and vegetables. In the fruit sector, labourers choose the by-day because the payment is immediate.

Across this form of labour, interviews and FGDs show that all do not belong to or are affiliated with trade unions within the sector, hence the gross exploitation they faced within the sector. In few instances, especially in the well organised large scale export companies, some of these casuals belongs to the workplace association which provided a platform for engaging with management. Majority of respondents indicated readiness to be unionised if it provided a vehicle for improving the terms of their engagement with employers.

4.2.2 GENDERED ROLES AND EMPLOYMENT RISKS: MEN DOMINATE WOMEN.

In Ghana, there is evidence of gendered roles, gendered differentials in pay, discrimination etc as found in this study.

Gendered roles: Women form majority of the entire labour force, particularly in vegetable production, a bit less in fruits cultivation due to the labour intensive-ness of fruit production or farming activity. However, women constitute majority (over 70%) of labour force in the production unit or level. Similar to other agriculture value chains, across board, men occupy the high-earning echelon of the value chain as outgrowers, as well as more secure positions as permanent staff while women have largely been employed as disposable casual workers. Within the brigade of casual labourers, men are engaged in weeding, pruning and application of inputs and pesticides. These more difficult activities are remunerated better than the watering, harvesting and sorting roles which are undertaken mainly by women. However, in vegetable production, the majority of the outgrowers and the casual labour are women, often undertaking works such as planting and harvesting etc.

Contracts and outgrower schemes favour men: Unlike women, outgrower schemes tend to provide opportunities only to men at the expense of women, often due to the fact that most women in the rural areas, engaging in smallholder farming, lack the resources (including land and capital) to take advantage of opportunities presented by outgrower schemes such as farm ownerships, the provision of raw materials, training, application of chemicals among others. This is because most of the schemes require farmers to own their lands and have capacity to undertake pre-planting preparation.⁹⁶ Women largely do not own lands and do not have the social capital to lease land without the presence of male relatives or partners.⁹⁷ For some women, they choose wage work or labour work not only because the payment is immediate but also because they want an income, they alone can control.⁹⁸

⁹⁴FGD with Yilokrobo mango farmers; interview with outgrowers for Golden riverside limited at Aprentem.

⁹⁵FGD with Adonten pineapple cooperative

⁹⁶Interview with female pineapple farmer in Pokrom; Interview with former Executive of YiloKrobo mango growers association; Interview the female vegetable farmer in Okushibiade.

⁹⁷Interview with female pineapple farmer in Pokrom; Interview with former Executive of YiloKrobo mango growers association; Interview the female vegetable farmer in Okushibiade.

⁹⁸Interview with female employee of GRSL; Interview with form manager of Hydrotech; Interview with female pineapple farmer in Pokrom
2020ProgressiveHorticultureerootdistribution.pdf

Women farmers in the horticulture sector in Ghana perform various on-farm and off-farm activities often regarded as unskilled activities; and the magnitude of their participation is hardly visualised, which creates perceptible gender gap.⁹⁹ Often, women participants in the sector have their abilities curtailed by several socio-economic constraints and issues which forbid them from the status of a farmer. For instance, women farmers performed on farm activities alongside their usual roles cooking, parenting, taking care of elderly and disabled members of the family, fetching water and firewood, cleaning and maintaining the household.¹⁰⁰ These findings are somewhat corroborated by Khalid (2017) who found that the average working woman in the informal sector in Ghana, compared to the average man in the same sector, is more likely to be working in commerce, has less work experience and

more likely to be married with children. Women are also engaged in secondary agriculture activities such as processing and preservation but mostly at home scale level and need proper orientation for upscaling at commercial levels.¹⁰¹

Analysis of field data show that the few women out-growers are not members of cooperatives and those who join cooperatives are not very active. Most of the casual female labour are not also organised or members of workplace-based associations or cooperatives within their vicinities, largely due to the time and costs required to join such groups. Interviews with women outgrowers and casual workers indicated the need for gender sensitive conditions of work such as spaces for minding children and guarantees of employment after maternity breaks.

⁹⁹ Interview with female pineapple farmer in Pokrom; Interview with former Executive of YiloKrobo mango growers association; Interview the female vegetable farmer in Okushibiade.

¹⁰⁰ Interview with female pineapple farmer in Pokrom; Interview with former Executive of YiloKrobo mango growers association; Interview the female vegetable farmer in Okushibiade.

¹⁰¹ (Srivastava et al, 2020) https://www.researchgate.net/publication/346122740_Women_in_growth_of_horticulture_-_Contributions_and_issues/link/6332dc5e694d4b4c648bb/download?_tp=eyJjb250ZXh0Ijp7ImZpcnN0UGFnZSI6InB1YmV2F0aW9uLiwiGF-nZSI6InB1YmV2F0aW9uLn19

CHAPTER 5: LABOUR RIGHTS AND RELATIONS IN GHANA

5.1 LEGISLATIVE AND INSTITUTIONAL FRAMEWORK FOR PROTECTION OF WORKERS RIGHTS IN GHANA

Ghana ratified ILO Convention No. 87 on Freedom of Association and Protection of the Right to Organise (1948) in 1965 and Convention No. 98 on the Right to Organise and Collective Bargaining (1949) in 1959. Ghana's 1992 Constitution and the 2003 Labour Act (Act 651) both guarantee protection of every worker's right, including employment protection, conditions of employment, remuneration, and termination of employment to mention but a few. It also provides for equal pay for equal work, sets out the maximum working hours per day at eight (8) or forty per (40) week and guarantees certain non-wage benefits (e.g., social security, paid annual leave, etc) for workers. The Labour Act elaborates this constitutional provision by granting every worker the right to form or join a trade union for the promotion and protection of the worker's economic and social interests. Collective bargaining (CB) is thus entrenched in the labour law and agreements reached under the CB are binding on all parties. The National Pensions Act (2008) also reinforces payment of social security by employers and employees.

The Act 651 makes provisions for the exception of some categories of works from joining unions for the purposes of the promotion and protection of the worker's economic and social interests. For instance, clause 2 of Article 79 of the Labour Act (Act 651, 2003) precludes workers in policy/decision-making and managerial positions or performing highly confidential duties from forming or joining a trade union. The Security Services Act also forbids military and paramilitary personnel from forming or joining trade unions (Ibid). Although not explicitly stated, the provisions in the Labour Act by their strict application precludes self-employed workers in the informal sector as they largely relate to an employer and an employee. Given that majority of Ghanaian workers are self-employed and operating in the burgeoning informal sector, it is fair to assume that the Ghana Labour Act largely does not apply to their situation.

While the Labour Act 2003 does not exclude Export Processing Zone (EPZ) workers from its coverage, section 34(i) of the Free Zone Act provides that free zone developers and enterprises shall be free to negotiate and establish contracts of employment that include wage scales, minimum working hours, employee suspension and dismissal, settlement of disputes arising between employers and employees and other such terms of employment as shall be consistent with ILO Conventions on workers' rights and conditions of service. This provision has sometimes been abused by free zone companies to deny their workers their right to form or join trade unions. For instance, Blue Skies Products (Gh), a British horticulture free zone company has consistently resisted unionisation of their employees and to some extent their outgrowers by the Food and Allied Workers Union (FAWU).¹⁰²

There are legally no barriers to grow or retail horticulture products on micro to small-scale basis as a Ghanaian. The sites of retailers of horticulture produces such as fruits and vegetables are common along the streets of peri-urban and urban areas. Generally, however, the Company Registration Code, 1963 (Act 179), the Partnership Act, 1962 (Act 152), the Business Name Act, 1962 (ACT 151) and the Ghana Investment Promotion Centre Act 1994 (Act 478) specify the conditions under which businesses can establish and operate. For most informal sector operators in Ghana, the requirements, and processes for registering businesses are cumbersome and time consuming. Therefore, many horticulture operators, particularly the small-scale operators and outgrowers, are neither registered nor regulated under any of the existing legislations.

The enforcement of labour laws in Ghana is entrusted to relevant state institutions including the Department of Labour, the National Labour Commission, the National Pensions Regulatory Commission and the courts. Many informal sector workers including those in the horticulture sector either do not know their rights and or are not capacitated to exercise them. As such, violations are often unreported and undocumented.¹⁰³

¹⁰²Interview with GAWU

¹⁰³<https://library.fes.de/pdf-files/bueros/ghana/10496.pdf>

5.2 WAGES AND BENEFITS

Ghana's tripartite committee made up of representatives of government, employers and organised labour set the country's minimum wage annually. The Labour Act of Ghana also guarantees certain non-wage benefits to include maternity, sick and annual leave. A minimum of fifteen (15) days annual leave and twelve (12) weeks maternity leave is available to all employees and women employees on confinement respectively. The Act also provides for the payment of severance pay in cases of redundancies. Aside these benefits, most formal sector employees, particularly unionised workers have access to other benefits such as medical, meals and transportation allowances. However, enforcement of national minimum wage in Ghana has not been effective, especially for workers who are not organised and do not enjoy collective bargaining. Labour inspectors from the Labour Department are unable to undertake monitoring due to limited resources available to the Department and therefore rely on complaints from workers on case-by-case basis. To improve conditions of work in the horticulture sector, it is critical for organising workers into cooperatives and unions. These organised workers must be required with information on minimum labour standards and wage negotiations and collective bargaining agreements. The associations must be capacitated to negotiate and demand enforcement of CBAs. Advocacy can be undertaken towards private sector associations within the horticulture sector, reinforced by embassies and government for employers to respect minimum wages and CBAs. FNV, through unions, can also support labour inspectors to undertake periodic monitoring of these companies to assess enforcement of labour standards. Labour departments at the national and sub-national levels can also be capacitated on effective record systems, digital case management and reporting on labour abuses within the horticulture sector.

Currently, the daily minimum wage in Ghana is GH¢14.88 (€1.21) or GH¢401.76 (€32.67) monthly. At over 40% monthly inflation since October 2022¹⁰⁴, this amount is inadequate to provide three square meals per head. Generally, in Ghana wages and salaries are

low. Four out of every five public sector workers in Ghana earned below GH¢3000 (€243) in 2022¹⁰⁵. Earnings in the informal sector is much lower than in the public sector. Formal sector employees in horticulture receive salaries and benefits comparable to their peers in formal agricultural enterprises. This is particularly so for employees of companies that export to European markets as good labour practice is one of the social standards requirements for certification. Also, like their peers in other sectors, organised workers tend to enjoy more benefits such as transportation, meals, medical benefits and sometimes accommodation than their unorganised counterparts (there are few exceptions though).¹⁰⁶ In an interview with officials of GAWU, it was noted that organised horticulture workers received relatively adequate compensation and benefits and in few cases beyond local standards.¹⁰⁷ For instance, one horticulture enterprise was reported to pay three months of monthly salary to each staff as annual bonus.¹⁰⁸ However, trade unions appreciate the different capabilities of each enterprise in the horticulture sector and therefore adopt collaborative approaches in their engagements with enterprises. GAWU indicated that a business centred approach is important to promote growth to protect jobs especially as most enterprises are recovering from the impact of COVID-19.¹⁰⁹ The concept of living wage according to GAWU is an aspiration which is being worked towards by the union and their collaborating businesses.¹¹⁰

Like workers in other sectors of the economy, majority of workers in the horticulture sector in Ghana are self-employed producers, outgrowers, retailers and casual workers. Most producers work below capacity because of limited supply of inputs and labour, seasonality of some crops and post-harvest losses.¹¹¹ According to Ghana Statistical Services (2022), the rate of transition from informal employment to unemployment within the horticulture sector is on average five times more than the movement from formal employment into unemployment.¹¹² These situations contribute to not just low but unpredictable income patterns among self-employed producers and retailers in the sector.¹¹³

¹⁰⁴ PowerPoint-presentatie (statsghana.gov.gh) (accessed on 27/09/2023)

¹⁰⁵ (GSS, 2023)

¹⁰⁶ Interview with Hydrotech; Interviews with Golden Riverside Limited

¹⁰⁷ Interview with GAWU

¹⁰⁸ Interview with GAWU

¹⁰⁹ Interview with GAWU

¹¹⁰ Interview with GAWU

¹¹¹ The Horticulture Industry in Ghana (echocommunity.org) (accessed on 27/09/2023)

¹¹² Population Of Regions and Districts Report (statsghana.gov.gh) (accessed on 28/09/2023)

¹¹³ Interview of Golden Riverside limited; Interview with Hydrotech; Interview with Water users association.

Most formal enterprises also engage casual workers, particular for production and processing while self-employed farmers and outgrowers employed hired labour on daily basis. Daily wages for casual workers and hired labour ranged between GHC60-70 (€4.50-€5.30). Some self-employed employers and even outgrowers provide free meals, accommodation and sometimes transportation for their labourers and provide medical care to cover minor ailments such as malaria and fever, but these were not documented or based on policy.¹¹⁴ Training, particularly on Occupational Health, Safety and Environment (OSHE) is often provided, sometimes through NGOs and other sources including the Ghana Export Promotion Authority.¹¹⁵ In terms of benefits, casual farm labourers hardly get benefits apart from food and sometimes temporary accommodation provided by employers (as in the case of migrant and bonded labourers). Health and other forms of insurance are not paid for this group of workers, although most are not provided with relevant PPEs when they apply harmful chemicals and fertilizers.

It is worth stating that a greater proportion of horticulture workers in Ghana are self-employed producers and retailers who rely on family labour and therefore do not keep accurate record of their expenses and income. Generally, income of horticulture workers (outgrowers, retailers and small-scale producers) are often affected by seasonality of produce, high cost of inputs, price fluctuations on local and international markets (which could also be due to seasonality). For instance, the cost of fertiliser was reported to have increased by 400% over the last couple of years due to high inflation and depreciation of the Ghanaian Cedi.¹¹⁶ Prices of pineapple, mango and bananas also fluctuate based on external factors such as conditions in the destination countries and competition from other countries.¹¹⁷ For instance, it was noted that most European countries can produce more fruits and vegetables during summer and therefore there is often low demand for imports

from countries like Ghana in summer, hence low price offers to exporters.¹¹⁸ Ghanaian pineapple and banana exporters also face competition from farmers from other countries like Costa Rica who produce quality pineapples at lower cost.¹¹⁹ At the local market level, urban vegetable farmers seem to enjoy better prices when there are lower levels of production from rural vegetable farmers. Yet overall, local market offtakers tend to dictate the prices as a result of farmers limited market options and absence of cold chain for processing and storage of the mostly perishable vegetables.¹²⁰

5.3 SOCIAL SECURITY AND PROTECTION

Ghana's National Pensions Act (2008) reinforces payment of social security by employers and employees including those in the horticulture sector. The Act establishes a three-tier scheme with mandatory first two tiers (which apply to wage/salary workers) and a voluntary third tier. It stipulates mandatory monthly contribution of 18.5 percent of employee's gross pay split between the employer and employees at 13 percent and 5.5 percent respectively. The employer is mandated to deduct the employee's contributions through the check-off system and submit to the appropriate agencies within 14 days of each month. Employees of formalised horticulture enterprises enjoy social security benefits like their counterparts in the formal sector of employment in the country. This was reinforced by interviews with workers of VRE¹²¹, Golden Riverside¹²² among others. For wage employees in the informal sector, compliance with the provisions of social protection is often low due to limited knowledge of entitlements and lack of enforcement by relevant bodies.¹²³

Self-employed persons in Ghana, per the Pensions Act, can voluntarily join pension schemes of their choice and make contributions based on their declared earnings/incomes irrespective of their sector of operation. In practice however, self-employed members of

¹¹⁴ Interviews from Golden Riverside limited; Interview with Hydrotech; interviews with Yilokrobo mango growers association; interview with vegetable farmers in Okushibiade and Ashaiman

¹¹⁵ Interview with GEPA official; interview with Executive of Adonten cooperative; FGD with Yilokrobo Mango growers association

¹¹⁶ FGD with Adonten pineapple farmers' cooperative; FGD with mango growers association; FGD with vegetable farmers in Okushibiade and Ashaiman; interview with female farmers in Pokrom and Somanya; Interview with chemic dealer in Pokrom; Interview with outgrower in Dumpong

¹¹⁷ FGD with Adonten pineapple farmers' cooperative; interview with farm manager at Golden Riverside; Interview with outgrowers in Dumpong and Aprentem

¹¹⁸ Interview with GEPA official; interview with Golden riverside farm manager; interview with former executive of FAGE.

¹¹⁹ FGD with Adonten pineapple farmers' cooperative; interview with farm manager at Golden Riverside; Interview with GAWU executives at VREL

¹²⁰ FGD with water users association in Ashaiman; FGD with vegetable farmers in Okushibiade

¹²¹ Interview with VREL official; Interview with GAWU VREL representative.

¹²² Interview with Golden riverside farm manager

¹²³ Interview with GEPA official; interview with GAWU General secretary

the national pension scheme are largely professionals in control of their own income like consultants, lawyers and people who work on commission rather than informal sector workers. The third-tier scheme has the flexibility to accommodate workers in the informal sector who have irregular income. Available informal sector schemes operating in Ghana include the SSNIT Informal Sector Pension Scheme, UNIWA Pension Scheme, the People's Pension Trust Ghana, and The Old Mutual Pension Trust Ghana. The Cocoa Farmers Pension Scheme was also launched in December 2020 and piloted in 2021 by the Government of Ghana and targets cocoa farmers in the 55 cocoa districts across the country. Generally, social security coverage in the informal sector remains low despite the introduction of such schemes almost 15 years ago. In a study of urban informal economy, 21 percent of sampled 5000 informal sector employers and employees across the then ten regions of Ghana indicated they contributed to SSNIT with 15.4 percent having life insurance and 5.4 percent on private pensions. The remaining contributed to retirement fund, (1.3 %) and group insurance (0.9 %).¹²⁴

PFJ didn't work well as most farmers in the horticulture sector did not benefit. Also suckers provided by GEPA and other state entities were often diverted by key political actors mandated to distribute these goods-Adonteng cooperatives.

"Coupons were provided to us but when we went to the agric office, we couldn't get the inputs to buy" inputs such as seeds and fertilizers are distributed on partisan lines".

The Government of Ghana implements several social protection programmes to boost incomes, health, basic education, agriculture production and bring relief to the most vulnerable. In the agriculture sector, government's fertilizer and seed subsidy initiatives through the Planting for Food and Jobs (PFJ) programme prioritizes vegetables such as tomatoes, pepper cucumber, lettuce, and carrots. Therefore, it is fair to assume that some horticulture farmers could benefit from the fertilizer subsidies which could improve their incomes. However, anecdotal information available indicates that subsidized fertilizers and seeds are often not available and affordable to smallholder farmers, particularly in quantities and times when most required¹²⁵

and distributions are mostly made based on political party considerations.¹²⁶ Other social protection programmes include capitation grant and school feeding programme to children in deprived basic schools and cash grant to extreme poor Ghanaians through the Livelihood Empowerment Against Poverty (LEAP). While these programmes may benefit children of horticulture sector workers and farmers, there are no clear and specific arrangements to directly target horticulture sector workers and their dependents as is the case for cocoa sector workers.

Generally, data on the number of horticulture workers who have social security cover is not available. However, some stakeholders mentioned that medium to large scale farmers sometimes take up life and medical insurance against unforeseen circumstances such as ill-health and death. For instance, employees of VREL and their dependents¹²⁷ (spouses and children) have health insurance cover.¹²⁸ Some out growers interviewed mentioned they cover the medical costs of their employees but not pension contributions.¹²⁹ Surprisingly, an employer mentioned workers were not interested in joining the state pension over unwillingness to have their share of the contribution (5.5%) deducted from their already meagre pay.¹³⁰ By not joining pension schemes, these workers are also losing out on the employers' share (13%) which is twice as much as their own contributions, pointing to the need for intense education of workers.

5.4 OCCUPATIONAL HEALTH, SAFETY AND ENVIRONMENT (OSHE)

Certification standards compel medium to large scale horticulture export companies to comply with OSHE standards. Most of these companies provide the required Personal Protection Equipment (PPEs) and train their workers on best practices.¹³¹ This is particularly so with large and medium scale producers and processors like Blue skies, VREL, GEL, Golden riverside, etc and producers and small farming cooperatives like Yilo Krobo mango growers association, Damfa, Dangbe West Margo Framers Association among others. For instance, in 2022, 98% of Blue skies staff received training on health & safety, all of its permanent staff

¹²⁴ Anuwa-Amrah, (2015). Understanding the urban informal Economy in Ghana: A Survey Report. Friedrich Ebert Stiftung Ghana.

¹²⁵ FGD with Adonten Cooperative Pineapple farmers; FGD with water users association in Ashaiman

¹²⁶ FGD with Adonten Cooperative Pineapple farmers; interview with vegetable farmers in Okushibiade and Ashaiman

¹²⁷ Interview with VREL representative; interview with Hydrotech manager

¹²⁸ Interview with VREL representative.

¹²⁹ Interview with outgrowers in Aprentem and Pokrom

¹³⁰ Interviews with Hydrotech manager; Interview with Golden Riverside manager

¹³¹ Interview with VREL; interview with GRL; Interview with hydrotech; interview with GEPA; Interview with MOFA.

covered by a health and safety management system. Also, across farms of their outgrowers and cooperatives, protective gears like wellington boots and gloves are provided for activities such as spraying.

Outgrowers for these companies also receive PPEs and training on good agricultural practices.¹³² While some of these trainings are organised directly by the medium to large scale horticulture export companies, others are facilitated by agric-centered development partners such as GIZ, USAID, SNV among others as previously indicated.¹³³ Respondents and participants in some of the focus group discussions also recalled instances of partnerships between the Ministry of Food and Agriculture (MOFA) and the local government offices to provide training for outgrowers on application of chemicals, fertilizers and keeping of records on their farming practices and activities.¹³⁴ Most self-employed farmers interviewed however confirmed they could not provide the necessary PPEs to their wage labourers and family members who help on the farms all the time.¹³⁵ Most self-employed farmers, particularly those who did not belong to the cooperatives/ associations, also indicated that they did not receive regular training on good agric practices and could not update their labourers more regularly, due to the cost of these trainings.¹³⁶ Thus, there is an opportunity for collaboration between FNV, cooperatives and labour unions as well as farmer organizations in the sector to train and target capacity development on OSHE towards self-employed farmers within and outside cooperatives on good agronomic practice and application of chemicals and record keeping. It is also essential for FNV to collaborate with farmer organisations and unions to support the provision of PPEs and training on use of PPEs for self-employed farmers within the sector.

Despite this, farmers and labourers across the value chain, particularly vegetable labourers, reported to work an average of 7 hours per day but sometimes 28 days per month during the peak season exposing farmer's to health risk and fatigue. Outside of the large farms and processors like Blue skies and HPW among others, most outgrowers indicated that though they

had received training on the application of chemicals and pesticides, they did not use the requisite PPEs due to limited access and inability to afford this critical equipment. Some undertook spraying without goggles and nose masks, resulting in health complications for some of the labourers. For vegetable farmers, for instance, spraying exposed them to various risks such as throat irritation, sneezing, and coughing. Chronic exposures to lower concentrations of fungicides can cause adverse health effects. Irrigation could also expose them to ingestion of soil and wastewater ingestion via dermal contact, inhaling chemicals and faecal contamination among others. Also, fruit farmers/ labourers, who are involved in spraying are also exposed to chemical hazards from pesticides (organochlorine pesticides) use and activities resulting in throat irritation, sneezing, and coughing among other health hazards.

Majority of informal sector horticulture retailers operate from their residential premises and others work from public places in temporary shed and structures, under trees or open spaces mostly under poor environmental conditions. Thus, they often retail on the streets or markets with poor hygienic conditions including exposure to scorching sun and sometimes near open stinking gutters or heap of garbage. Most of these workers are either ignorant about hazardous practices or substances or simply cannot afford protective gadgets.¹³⁷

Across most of the interviews, respondents acknowledged that the use of fertilizers and pesticides exposes farmers of horticulture produce to hazardous chemicals¹³⁸, while heavy lifting and use of machinery without the appropriate training could cause posture issues and accidents for such workers.¹³⁹ Yet, there was a general admission that both employers and employees or even wage labourers were not minded to insist on the use of relevant PPEs and the use of appropriate machinery. Indeed, interviews showed that given the potential hazardous effects of the chemicals, women were not allowed to apply chemicals and chemical workers tended to be paid higher to somehow compensate for their risks and exposure.¹⁴⁰

¹³² Interviews with GRL outgrowers; interview with Yilokrobo Mango growers association.

¹³³ Interview with Yilokrobo Mango growers association; interview with executive of Adonten pineapple outgrower

¹³⁴ Interview with executive of Adonten pineapple outgrower; interview with vegetable farmers at Okushibiade; interview with vegetable farmer in Ashaiman

¹³⁵ Interview with outgrower of Golden Riverside Limited at Aprentem

¹³⁶ Interview with pineapple farmer at Pokrom; interview with vegetable farmer at Ashaiman

¹³⁷ Interview with farmer in Pokrom; Interview with vegetable farmer in Ashaiman; interview with pineapple sellers in Pokrom; interview with mango sellers in Somanya

¹³⁸ Interview with GEPA official; interview with farmers of Dumpong

¹³⁹ Interview with female mango farmer; interview with GSL farm manager

¹⁴⁰ Interview with woman mango farmer; interview with former executive of Yilokrobo mango growers association; interview with farm manager of Golden Riverside Limited

5.5 CHILD LABOUR IN THE HORTICULTURE SECTOR

The Children's Act of Ghana sets the minimum age for light work at 13 and the minimum age for hazardous work at 18. Children are also not allowed to engage in night work; defined as between 8 p.m. and 6 a.m. Ghana has ratified the ILO Convention on the Worst Forms of Child Labour. Section 18 (1) of the Labour Act stipulates that a young person shall not be engaged in any type of employment or work likely to expose the person to physical or moral

hazard. In June 2023, Ghana launched a new five-year Accelerated Action Plan Against Child Labour (2023-2027).

Yet, a significant feature of Ghana's labour market is a relatively high proportion of economically active children. Child labour is an integral part of family labour, especially in the rural agricultural environment. Analysis of the seventh round of the Ghana Living Standard Survey (GLSS 7 2016/17) show that about 13 % of Ghanaian children aged 5 to 14 are engaged in economic activities.

Table 5: Data on Child Labour in Ghana

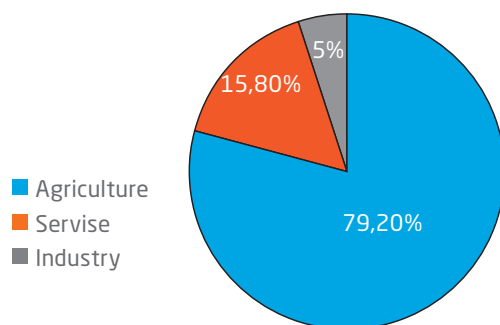
| Children | Age | Percentage |
|---------------------------|---------|------------|
| Working | 5 to 15 | 13% |
| Attending school | 5 to 14 | 89.9% |
| Combining school and work | 7 to 14 | 13.2% |
| Primary completion Rate | | 93.8% |

Source: GLSS7 2016/2017; ILO,2022

Different categories of children are found in the labour chain in rural communities in Ghana: those who have never been to school, those who have dropped out of school and those who are still in school but assist their parents. Some children are engaged by a parent or a close family member and may be paid or not. There are also children employed by non-relatives. Such children are usually out of school and fully on the labour market. Child workers are engaged in a wide range of economic activities with agriculture being the largest employer, particularly in rural areas. In urban centres, children often engage in street vending retailing range of products including horticulture produce such as fruits and vegetables in raw or processed forms.

Research by the National Opinion Research Centre at the Chicago University in Ghana during the cocoa harvesting season of 2018-2019 found not only an increase in child-labour but also trafficking of children for exploitation into labour in cocoa production, domestic work, sexual exploitation, gold mining and fishing. Migrant young girls from Northern Ghana to southern Ghana engage in head portering, carrying heavy loads on their heads and were vulnerable to sexual abuse and exploitation. Some of these girls are used to cart horticulture produce in market for both buyers and sellers.

Figure 5: Sectors That Employ Children in Ghana



Source: GLSS7 (2016/17; ILO,2022)

Child labour is common in informal horticulture activities like the informal sector generally. Smallholder horticulture farmers and some outgrowers indicated that they often depend on family labour which include children.¹⁴¹ However, most children are engaged after school, weekends and during school holidays which does not interrupt their education, most stakeholders stated.¹⁴² Horticulture cooperative farmers interviewed in the Akwapim South District and vegetable farmers in Ashaiman demonstrated knowledge about child labour and bemoaned engaging children in work that deprived them off education. They mentioned some regulation of child labour in their communities by traditional and opinion leaders. They however highlighted that school-going children in their communities were being engaged by small business owners to undertake transport services which was hampering their education.¹⁴³

¹⁴¹ Interviews with outgrowers of GRL in Aprentem; interview with female pineapple farmer; interview with executive of Adonten cooperative; interview with Hydrotech manager; interview with female mango farmer

¹⁴² Interviews with outgrowers in Aprentem; interview with vegetable farmers in Okushibiade

¹⁴³ Interview with vegetable farmers in Okushibiade; FGD with Adonten farmers

5.6 GENDER WAGE GAP, GENDER-BASED VIOLENCE AND DISCRIMINATION IN EMPLOYMENT

Gender gap in employment is a global concern. Globally, there are less women (48.5%) in paid employment than men (75%). For those in wage employment, women earn 77 cents on every dollar earned by men for hour worked, translating into 23 % gender wage gap. In Ghana, there is gender pay gap of six (6) percent in the public sector. In 2022, the average monthly of women public sector workers in Ghana was found lower than their male counterparts in all 16 regions (GSS, 2023).¹⁴⁴ Similarly, Addai (2011) found significant wage gap in the Ghanaian informal sector in favour of men despite the average female being better skilled than the identical male.

In the horticulture sector, gender wage discrimination manifested clearly as women are found to undertake low skilled roles compared to their counterparts. Interview with horticulture sector producers confirmed they employed few permanent staff as managers and technical advisors and these roles were largely filled by males. In the context of processors, there were higher numbers of permanent staff and appreciable numbers of women formed part of this cadre of staff.¹⁴⁵ Similarly, membership of farmer cooperatives in the Akwapim South District, Yilokrobo and the Asuogyaman Districts in Ghana were predominantly men. According to the male horticulture farmers, women were predominantly hired to fetch water for the farms and to support with harvesting on hired labour basis,¹⁴⁶ and where both men and women performed the same task, they received equal pay.¹⁴⁷ Women also dominate the marketing of horticulture produce in Ghana as either self-employed or contributing family workers.¹⁴⁸ Reasons cited for not engaging more women as farm labourers included childcare responsibility and limited

capacity to do manual work like weeding, pruning and application of chemicals. A farmer retorted that:

“The women are not able to do 6 hours of manual work. They get tired so early. Some of them also come to the farm with babies which becomes a challenge. So, we only engage them during harvest and processing”.

In Northern Ghana, cultural practices often do not allow women to own land and therefore discourage them from being farm owners. There were few instances though where women were the farm owner and or caretakers, but they reported higher operating costs as they often had to depend on male labourers to undertake the difficult activities such as weeding, pruning and application of chemicals.¹⁴⁹ Regardless, most women inter-crop their husbands’ farms with vegetables but mainly for consumption by the family. Women however dominate the retail horticulture sector as marketers for their spouse’ products or as traders through which they earn some income.

On a rather positive note, women in formal horticulture enterprises, particular those that have unions were found to have equal protection as their counterparts in other sectors.¹⁵⁰ They were guaranteed maternity leave on confinement and nursing breaks for six months when they resume work.¹⁵¹ However, childcare at workplaces continues to be a challenge as most enterprises do not have childcare facilities, a situation which is not peculiar to the sector.¹⁵² In an interview with trade union leaders, it emerged that collective bargaining often consider the peculiar needs of women workers. For instance, it was reported that women workers in factories that export bananas are often assigned sorting roles which require them to stand for hours.

¹⁴⁴ Ghana Statistical Service, Earnings and Inequality Report, February 2023

¹⁴⁵ Interview with GEPA

¹⁴⁶ Interview with former executive of Yilokrobo mango grower association; Interview with woman mango farmer; interview with woman out-grower of pineapples

¹⁴⁷ Interview with the hydro-tech manager

¹⁴⁸ Interview with former executive of Yilokrobo mango grower association; Interview with woman mango farmer; interview with woman out-grower of pineapples

¹⁴⁹ Interview with woman mango farmer; interview with woman outgrower of pineapples

¹⁵⁰ Interview with GAWU executive secretary

¹⁵¹ Interview with VREL GAWU representative

¹⁵² Interview with VREL GAWU representative

CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

Ghana's democratic successes and political economy has over the years influenced policies and governance in its horticultural sector. The country has made major progress related to poverty reduction and global human development, with implications for both the horticulture sector and labour rights within the sector. In real terms, however, the distribution of wealth remains uneven along geographies especially the huge gap between the north and the south and also on the lines of gender, indicating that the general macro-economic performance in the last decade has not translated into a significant socio-economic transformation of the structure of the economy, with widening inequalities for women who dominate activities in the informal sector in particular. The horticulture sector, providing fruits, vegetable and seeds, has in turn contributed to the country's GDP, employment and exports.

The country's horticultural sector and production systems is dominated by crops such as pineapple, mangoes, bananas, oranges and exotic vegetables, which are mainly grown for export.¹⁵³ The sector is dominated by smallholder farmers, farmer groups/cooperatives and mostly on small to medium scale productions. Overall, the main sources of seeds in the horticulture sector remain both formal and informal.

Much horticulture trade in Ghana remains informal, with an estimated 80-90% of consumed domestically, passing through informal channels from smallholder farms to consumers.¹⁵⁴ Smallholders with just 1-5 hectares produce a range of fruits, vegetables, and staple crops, using family labour and minimal mechanization.

Within the horticulture value chain, production is dominated by smallholder farmers, either as individuals or farmer groups, focused on key domestic crops such as tomatoes, onions, chilli pepper as well as mangoes, banana, pineapples and oranges for export. Key processing, export and large commercial companies and institutions such as Blue Skies, HPW, Golden Exotic etc also contracts farmers individually or through out-grower schemes to supply raw commodities for subsequent processing and exports.

The overall horticultural sector organisations and supply chains reflects Ghana's broader political economy, with import and export-oriented domains having stricter quality compliance (certification etc) and formal vertical coordination between actors i.e., Processors, exporters, regulators, governments and retailers etc. Key exports include fruits like Pineapple, banana and mango which are predominantly exported to Europe (Netherlands, UK, Belgium, Spain) and vegetable like tomatoes, chilli and onions which also exported mainly to neighbouring African countries. Despite government of Ghana policies and initiatives, local and domestic chains are largely informal with spot market transactions to selected outlets and local markets, with aggregators particularly serving as intermediaries between farmers and diverse off-takers. This supply chain is also characterised by small-scale production and processing, and the distributive concerns surrounding central government's agricultural input subsidises such as fertilisers and seeds. Also, despite national regulations for pricing, enforcements are limited.

The nature and pattern of employment in the horticultural sector also mirrors the formal-informal divide. As observed, permanent roles which has regular, often union-negotiated wage and benefits are more common in large commercial companies, processors and pack houses for export and serving international clients whilst self-employed farmers, labourers and seasonal work persist more in the domestic supply chain.

Majority of workers in the horticulture sector in Ghana are self-employed producers, outgrowers, retailers and casual workers. Majority remain ununionized. Many do not know their rights and or are not capacitated to exercise them. As such, violations are often unreported and undocumented.

While some permanent staff in companies like VREL, HPW and GEL are unionised and affiliated to unions such as GAWU, ICU, UNEAGES among others, majority are not affiliated to trade unions. Some indicated they were part of enterprise-based unions/workplace-based associations which formed the basis for them to negotiate their conditions with employers in their

¹⁵³Egyir et al., 2022

¹⁵⁴<https://www.rvo.nl/sites/default/files/2021/05/Ghana-Food-Manufacturing-Study.pdf>

respective industries. Most formal enterprises also engage casual workers, particular for production and processing while self-employed farmers and outgrowers employed hired labour on daily basis. Across the *By-day labourers/ Casuals*, all do not belong to or are affiliated with trade unions within the sector, hence the gross exploitation they faced within the sector.

In terms of decent work and working conditions, despite Ghana's *Labour Act* that guarantees certain non-wage benefits to include maternity, sick and annual; and wages/salaries not less than the national minimum wage in Ghana, enforcement (of the law) has not been effective, especially for workers who are not organised and do not enjoy collective bargaining. Labour inspectors from the Labour Department are unable to undertake monitoring due to limited resources available to the Department and therefore rely on complaints from workers on case-by-case basis.

Earnings in the informal sector is much lower than in the public sector. Formal sector employees in horticulture receive salaries and benefits comparable to their peers in formal agricultural enterprises. This is particularly so for employees of companies that export to European markets as good labour practice is one of the social standards requirements for certification. Also, like their peers in other sectors, organised workers tend to enjoy more benefits such as transportation, meals, medical benefits and sometimes accommodation than their unorganised counterparts (there are few exceptions though).

Generally, social security coverage in the informal sector remains low but employees of formalised horticulture enterprises enjoy social security benefits like their counterparts in the formal sector of employment in the country.

Also, certification standards compel medium to large scale horticulture export companies to comply with OSH standards. In the small holder farms, health and other forms of insurance are not paid for this group of workers.

There are gaps in training of farmers on the right application of these pesticides, which could lead to over or underapplication. Most self-employed farmers confirmed they could not provide the necessary PPEs to their wage labourers and family members who help on the farms all the time.

There exist some informal mechanisms for regulation of child labour in their communities by traditional and opinion leaders. However, school-going children in their communities were being engaged by small business owners to undertake transport services which could affect their education.

Overall, while Ghana has prioritised and introduced policies for the horticultural sector, particularly for high value exports and value-added quality produce, there is evidence of decent work deficits owing to the non-enforced and underutilisation of legal provisions as well as the largely informal market dynamics that characterise many aspects of the sector and its value chains.

RECOMMENDATIONS

The country's horticultural sector and production systems is dominated by crops such as pineapple, mangoes, bananas, oranges and exotic vegetables, which are mainly grown for export. The sector is dominated by smallholder farmers, farmer groups/cooperatives and mostly on small to medium scale productions. There are opportunities for the horticulture sector to remedy the above highlighted gaps in human and labour rights, productivity and profitability through continuous advocacy, cooperation and dialogue with state partners, labour unions, farmer organisations and other civil society, private sector and development partners in the implementation of practical recommendations. It is also worth stating that future horticulture sector interventions should focus on the Greater Accra, Volta and Eastern regions due to the presence of large horticulture sector players who are engaged in exports and production for local markets.

1. RECOMMENDATIONS FOR CONSIDERATION

for future interventions of Mondiaal FNV with special reference to steps possible considering social dialogue, living wage, forced and child labour, gender-based violence and discrimination, occupational health and safety, and social protection.

SOCIAL DIALOGUE

- Conduct further studies to understand the drivers of poor unionization among various categories of workers and employees within the horticulture value chain and forge strategies between FNV and existing trade unions to expand unionization into this category of workers.
- Establish entry points for collective dialogue on trade unionization and organization among the

various private sector employees within the horticulture sector by working with private sector umbrella bodies such as Ghana Employers Association, Fruit Processors and Marketers Association of Ghana (FPMAG), Vegetable Producers and Exporters Association of Ghana (VEPEAG), and FAGE.

WAGES AND COLLECTIVE BARGAINING

- Collaboration between FNV, Embassies/Development partners, trade unions and cooperatives within the horticulture sector to undertake continuous training of small holder farmers or producers and associations on negotiation skills for better wage arrangements and decent work conditions as well as the relevance of simple but enforceable contracts.
- Collaboration between FNV, Development partners, trade unions, NGOs and cooperatives within the horticulture sector to undertake training of small holder farmers to enable the establishment of simple but enforceable contracts with off-takers and aggregators and contribute to improved work conditions.
- Collaboration with trade unions to organize horticulture sectors would help improve income/wages and working conditions. Given the low returns on organizing informal sector workers (as a result of low collection of dues), collaborations should include interventions to increase income of the workers or establish sustainable sources of financing to trade unions to enable them sustain these efforts.

LABOUR RIGHTS FOR WORKERS

- Support advocacy for instituting measures to ensure that eligible seasonal, temporary and casual workers are given permanent employment status. This is important because permanent contracts give workers access to improved working conditions, increased job security, paid leave, improved legal protection and a greater likelihood of benefiting from private sector codes and standards.
- Support worker education programmes to inform workers about their legal rights, in particular their right to freedom of association and collective bargaining, and the conditions under which workers are entitled to permanent contracts and associated social protections.
- Collaborate with development partners and international NGOs to ensure that compliance with international and national labour rights, and payment of at least the minimum wage for all types of workers is enshrined as a condition for providing financial and/or technical support to private companies in the horticulture sector.

- Collaborate with development partners and international NGOs to ensure that compliance with international and national labour rights, and payment of at least the minimum wage for all types of workers is made a requirement by sourcing companies in their purchase contracts with suppliers.

CERTIFICATION AND QUALITY STANDARDS

- Support for regulatory institutions such as PPRSD, FDA and EPA to establish a functional food safety task force for the horticulture sector – a public-private collaborative action on food risk assessment, awareness creation food safety and regulatory bottlenecks.
- Support/ facilitate cooperation among regulatory institutions such as FDA, EPA, to simplify the processes for registration of small holder farmers and also undertake coaching on registration and business plan development for small holder farmers who intend to add value to their produce by processing for local markets.
- Support the provision of intensive support to small-holder outgrowers to achieve compliance with a national standard that mirrors the likes of GLOBAGAP.
- Boost partnership between government and private export firms to provide compliance support to small-holders.

OCCUPATIONAL HEALTH, SAFETY AND ENVIRONMENT

- Support collaboration between NGOs, trade unions, cooperatives of small holder farmers and input suppliers to train small holder farmers and outgrowers on proper application of inputs and proper book and record keeping on the use of chemicals in their production.
- Facilitate training for input suppliers, producers and processors on quality requirements in the European market and certification standards.

SOCIAL PROTECTION

- Create awareness among employees in associations in private sector processing companies, unions and smallscale producers and outgrower cooperatives on social security and pensions to boost social security uptake and contribute to reducing vulnerability of workers in the horticulture value chain.
- Partner with trade unions to advocate for government to strengthen the enforcement of state employment/social security schemes, for example making sure that employers within the horticulture

value chain register all eligible employees under these schemes, in order to ensure that workers have a safety net in the face of negative external market shocks.

CHILD LABOUR

- Continuous sensitization of communities with high concentration of horticulture sector producers and processors on negative effects of child labour practices by NGOs, unions and cooperatives in the horticulture sector.

GENDER-BASED VIOLENCE

- Collaboration with trade unions to increase awareness on gender-based violence to aid reporting
- Build capacities of trade unions to ensure inclusion of clauses that protect women and mandate employers to prevent occurrences and to sanction perpetrators when they violate these provisions.
- Support employers/suppliers to provide special facilities and working conditions for mothers, including provision of childcare facilities, nursing breaks, and lighter duties for pregnant women.
- Collaborate with unions to work with government to strengthen laws and policies concerning sexual harassment, occupational health and safety, and childcare provision to reflect women workers' specific needs.
- Partner with Development partners supporting private sector companies/initiatives to require adoption of equal opportunities employment policies and practices as a condition of contract/funding.
- Lobby certification bodies to ensure that sustainability codes/certification standards of private producers and processors should address women workers' issues. They must ensure that women are included in consultations about code content, and that women workers' specific needs and priorities are included in code provisions.
- Support affirmative actions/policies to ensure women are adequately represented in the leadership of producer groups/cooperatives Unionization/ organization of unions and cooperatives
- Support the formalization of cooperatives among small scale producers and workers' associations within horticulture sector processing and producing companies
- Equip labour unions, small scale producer cooperatives and workers' associations within horticulture sector processing and producing companies with practical skills to organise small holder farmers and outgrowers of large and medium companies to improve labour conditions in the sector.

2. RECOMMENDATION OF PRIVATE ACTORS IN THE SUPPLY TO BE TARGETED FOR LOBBY AND ADVOCACY WORK.

- Support advocacy with interprofessional private sector bodies to ensure that sourcing companies engage in constructive dialogue with national unions to promote trade union rights.
- Support private sector professional organisations in the horticulture sector on their lobbying activities to advocate for policies that facilitate development of new business models that could bring costs down in, e.g., transport, renewable energy, packaging.
- Support private sector professional organisations in the sector in developing a national horticulture policy and processing strategy.
- Facilitate participation of private sector professional organisations in international trade fairs for the most promising processing and exporting SMEs.
- Facilitate advocacy towards private sector federations within the sector and government to promote the enforcement of labour laws to reduce labour casualisation and shift the paradigm towards unionization/ organisation of workers within the sector.
- Facilitate advocacy through the private sector associations and labour unions, reinforced by DPs for employers to respect minimum wage standards, OSHE and CBAs.

3. RECOMMENDATION REGARDING PARTNER ORGANIZATIONS AND SERVICE PROVIDERS

Based on findings of the mapping and assessment of gaps within the sector, we identify two programme delivery mechanisms as follows;

a. Collaborations with trade unions to address deficit work deficits;

- Support to trade unions to increase unionisation of those in formal enterprises to extend collective agreements to them to improve wages and conditions of service.
- Support to trade unions to facilitate expansion of the informal sector and enterprise-based unions that could be affiliated to them to enable unions either represent them during negotiations (where possible) or build their capacities on negotiations and book-keeping skills to enable them to negotiate better.
- Support to trade unions to facilitate expansion of the informal sector worker cooperatives to enable them train them on bookkeeping, financial skills, business and strategy skills.

b. Collaborations with INGOs/Private Sector to improve capacity (either directly as service providers or through trade unions);

- Collaboration with INGOs/private sector to train the farmers certification standards to make their products attractive to export companies.
- Service providers to provide training to formal sector unions and informal sector cooperatives within the horticulture value chain.
- Work with service providers to engage smallholder farmers cooperatives and outgrowers on input application, record keeping, testing of modern technologies among others.
- Collaboration with INGOs to empower trade unions in policy and advocacy on government subsidies and environmental standards and partnerships building with private sector federations in the sector.
- Collaboration with service providers such as PUM and or solidaridad and trade unions to facilitate extensive training on social dialogue in unions in formal enterprises, enterprise-based unions affiliated to unions and even in the informal sector cooperatives with interest in collaborating with trade unions.

4. RECOMMENDATIONS ON POSSIBLE COOPERATION WITH GOVERNMENTAL AGENCIES

- Partner with certifying institutions such as GLOBACAP to ensure that voluntary/private sector labour codes and certification schemes extend their scope of influence to include non-permanent as well as permanent workers.
- Collaborate with government institutions such as Labour Commission and Ministry of Labour and Employment Relations while partnering with Ghana Employers Association to ensure that collective bargaining agreements are extended to cover all workers and that non-permanent as well as permanent workers can, in practice, join unions and bargain collectively without fear of reprisal.
- Support for regulatory institutions such as PPRSD, FDA and EPA, GSA to establish a functional food safety task force for the horticulture sector - a public-private collaborative action on food risk assessment, awareness creation food safety and regulatory bottlenecks.
- Support/ facilitate cooperation among regulatory institutions such as FDA, EPA, to simplify the processes for registration of small holder farmers and also undertake coaching on registration and business plan development for small holder farmers who intend to add value to their produce by processing for local markets.

- Collaborate with GEPA to support in coaching of processors and exporters of fruits concentrate and dried fruits.
- Collaborate with GEPA and NCO to facilitate participation of most promising processing and exporting SMEs in international trade fairs.
- Collaborate with GRA and GEPA to facilitate training on import/export regulations (tariffs and fiscal legalisations).
- Partner Ghana Export Promotion Authority, Ghana Freezones Authority, and relevant bodies to streamline export policies for Horticulture sectors and fashion out mechanism for organized and cost-effective freight system for horticulture sector exporters and processors.
- Partner GSA and FDA as well as MOFA to support continuous training for small holder farmers and outgrowers GLOBALG.A.P standards and other certifications required for exports.
- Collaborate with Departments of Social Welfare and Education to establish child labour free zones in horticulture-dominant communities.

5. RECOMMENDATION OF SPECIFIC TRADE OR VALUE CHAIN TO BE TARGETED.

INPUT SUPPLY

- Support advocacy for collaboration between government, crop research and regulators to develop indigenous organic and inorganic fertilizers and pesticides that are cost effective, to reduce reliance on imports which are subject to price volatilities, inflation and supply chain disruptions.
- Improve smallholders' access to credit via the establishment of more credit unions, group savings/credit schemes, and/or strengthened PMOs linked to banks and microfinance institutions.

PRODUCERS

- Facilitate the training of outgrowers or small holder producers, via their associations and cooperatives on processes for application of inputs and record keeping on the use of chemicals in their production in conformity to Global Good Agricultural Practices.
- Train outgrowers or small holder producers via existing cooperatives or associations on keeping proper record of their costs to enable them to negotiate for adequate prices for their produce. Record keeping is also essential to access financial support from financial institutions.

PACKAGING AND STORAGE

- Working with partners and key stakeholders including NGOs in the sector to facilitate the preparation of technical material related to good processing and preservation practices.
- Facilitate knowledge transfer and investment into freezing units/ pack houses and other potential new products.

PROCESSORS

- Facilitate cooperation with regulatory institutions such as FDA, GSA and GEPA to simplify the processes for registration of small holder farmers and also undertake coaching on registration and business plan development for small holder farmers who intend to add value to their produce by processing for local markets.
- Assist processors in obtaining the necessary capitalization / review of available technologies (improved technologies already in use in West Africa) able to increase productivity;
- Support SME training on financial skills, business and strategy skills and record keeping.
- Conduct study on opportunities for value addition of by-products during off- season and support implementation of recommendations.

- Advocate for government- and donor supported programmes to help small-scale women traders and processors to upgrade their operations and support women's cooperatives to establish horticulture processing factories, and provide training and equipment to female horticulture traders to help them improve product quality.

EXPORT/MARKETING

- Support in coaching of processors and exporters of fruits concentrate and dried fruits.
- Facilitate participation in international trade fairs for the most promising processing and exporting SMEs.
- Facilitate training on import/export regulations (tariffs and fiscal legalisations).
- Work with GEPA, FZA and GRA to increase incentives for exporters/processors to comply with contracts, and negotiation of more favourable terms and conditions for smallholders and outgrowers-
- Partner with small holder cooperative and DPs to establish a collective farmers' bodies to take responsibility for marketing and interaction with other horticulture value chain stakeholders, in order to improve smallholders' returns from engagement in the horticulture value chain.

