Organic market development and legal frameworks in the world

› Beate Huber
› Helga Willer
Organic Products sold worldwide
Growth of the global market for organic food and drink

Source: Organic Monitor (Sahota 2008)
Distribution of global revenues with organic food and drink 2006

Source: Organic Monitor (Sahota 2008)
Organic markets: The ten leading countries

- USA (2006): 13,359
- Germany (2007): 5,300
- UK (2006): 2,831
- France (2007): 2,000
- Italy (2007), est: 1,850
- Switzerland (2007): 789
- Austria (2006): 739
- Canada (2006): 703
- Denmark (2007): 530
- Netherlands (2007): 519

Source: Survey by FiBL, ZMP, Aberystwyth University, Agromilagro Research

Round Table Kyiv 05.11.2008
Development of major European markets 2006/2007

Source: Survey by FiBL, ZMP, Aberystwyth University, Agromilagro Research

*Estimate
The regulated organic world

US-NOP

EU-Reg. ISO 65

JAS

Canada

China

National Requirements
## Organic Regulations by Continent

<table>
<thead>
<tr>
<th>Country</th>
<th>Countries with regulations</th>
<th>Contries per continent</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>39</td>
<td>41</td>
<td>95%</td>
</tr>
<tr>
<td>America and Carribean</td>
<td>17</td>
<td>35</td>
<td>49%</td>
</tr>
<tr>
<td>Asia and Pacific</td>
<td>11</td>
<td>62</td>
<td>18%</td>
</tr>
<tr>
<td>Africa</td>
<td>3</td>
<td>55</td>
<td>5%</td>
</tr>
<tr>
<td>Total</td>
<td>55</td>
<td>193</td>
<td>33%</td>
</tr>
</tbody>
</table>
Countries Drafting Regulations

- Europe: Ukraine, Russia, Bosnia and Herzegovina

- Armenia, Azerbaijan, Hong Kong, Indonesia, Lebanon, Saudi Arabia, Vietnam

- America and Caribbean: Cuba, Nicaragua, St Lucia

- Africa: Cameroon, Egypt, Kenya, Madagascar, South Africa, Tanzania, Zambia
Importing Schemes

- Direct acceptance of the certifying agency by the target import country
  - EU: not yet implemented

- US: 40 foreign certification bodies approved
  - Latin America: 10
  - Europe: 22
  - Asia: 1
  - Australia, Canada: 7

- Japan:
  - Latin America: 0
  - Europe: 7
  - Asia: 0
  - Austr., NZ, US: 4

- China, Canada: not fully implemented
Importing Schemes

- Bilateral agreements on mutual acceptance between the exporting and the target import country
  - EU (Third Country List):
    - Argentina, Australia, Costa Rica, India, Israel, New Zealand, Switzerland
  - US:
    - Negotiations with Australia, EU, India, Japan, no bilateral agreement yet
    - Recognition of government conformity assessment of Israel, India, Great Britain, Denmark, New Zealand, Quebec
  - Canada, China: Not yet implemented
Conclusions

- Organic markets are fast growing markets
- Growing markets provide marketing opportunities for newcomers
- Ukraine has a huge potential for exports to Europe
- Governments can stimulate organic agriculture by providing supportive frameworks
- Organic legislation for
  - Local market development (preventing unfair competition and misleading labeling)
  - Facilitating market access in export countries
Thank you very much!