The World of Organic Agriculture:

Regulations and Certification
Emerging Trends 2013

Beate Huber
Organic Regulations by Continent (2011)

<table>
<thead>
<tr>
<th>Continent</th>
<th>Countries with Regulations 2002</th>
<th>Countries with Regulations 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>27</td>
<td>38</td>
</tr>
<tr>
<td>Other: 11 EU 27</td>
<td></td>
<td>EU 27</td>
</tr>
<tr>
<td>America and Carribean</td>
<td>6</td>
<td>21</td>
</tr>
<tr>
<td>Asia and Pacific</td>
<td>10</td>
<td>25</td>
</tr>
<tr>
<td>Africa</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>44</td>
<td>86</td>
</tr>
</tbody>
</table>
Countries Drafting Regulation

➢ Europe: Russia, Ukraine, Bosnia-Herzegovina

➢ Asia: Bangladesh, Hong Kong, Kyrgyzstan, Laos, Nepal, Pakistan, Sri Lanka, Syria, Vietnam

➢ America and Carribean: Jamaica, St Lucia

➢ Africa: Egypt, Kenya, Senegal, South Africa, Tansania, Zambia, Zimbabwe
Certification bodies per region

- Africa
- Asia
- Europe
- Latin America & Caribbean
- North America
- Oceania


Graph source: FiBL www.fibl.org

THE ORGANIC STANDARD www.organicstandard.com
## Countries with most certifiers

<table>
<thead>
<tr>
<th>Country</th>
<th>2012</th>
<th>2011</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Korea</td>
<td>76</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>Japan</td>
<td>61</td>
<td>61</td>
<td>61</td>
</tr>
<tr>
<td>USA</td>
<td>49</td>
<td>51</td>
<td>51</td>
</tr>
<tr>
<td>Germany</td>
<td>32</td>
<td>31</td>
<td>31</td>
</tr>
<tr>
<td>Spain</td>
<td>27</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>China P.R.</td>
<td>24</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>India</td>
<td>24</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>Canada</td>
<td>23</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>Romania</td>
<td>17</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Italy</td>
<td>13</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Poland</td>
<td>11</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>France</td>
<td>10</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

www.organicstandard.com/directory

The Organic Standard
Hall 4 Stand 344
Latest Trends

Global market: Distribution of retail sales value by single markets 2011

- USA: 44%
- EU: 41%
- Canada: 4%
- Japan: 2%
- Switzerland: 3%
- Others: 6%
US National Organic Program (NOP)

› US Equivalency arrangements:
  › Canada

› EU (01.06.2012)
  › Geographical scope: Products grown or imported in US/EU (acceptance of each others imports)
  › Exclusion (complementary certification required)
    › Apples and pears from US
    › Livestock from EU
  › Not in the scope: Wine, Aquaculture
Concerns EU-US arrangement

› Variances for additives and aids (baby-food)
› Fortification (vitamines/minerals)

⇒ Consumer expectation are different in US/EU
⇒ Changes in US NOP might threaten consumer trust in EU

› Interruption of trade with non-EU/US countries (e.g. Switzerland) ?
  › Products from CH require NOP certification
  › Suppliers from EU to CH have to be NOP certified (e.g. milk powder)

⇒ Will there be NOP certification in EU?
Import rules in EU

- Recognition of equivalent Third Countries:
  - **US** (2012); Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, Switzerland, Tunisia, New Zealand

- Recognition of **equivalent control bodies** (CB) for operations in Third Countries (since 01.07.2012)
  - 53 certification bodies approved
  - for around 60 countries

- Import authorizations expire by 01.07.2014 the latest

  ⇒ How to import from countries or product categories not listed?
Other developments

➢ Bilateral agreements Canada – Switzerland

➢ China
  ➢ Certifiers must be CNCA accredited
  ➢ Imports to China require Chinese certification
  ➢ Exports from China require Chinese certification

➢ Korea’s current labeling standards extended until 31.12.2013
Conclusions

- The countries with the largest organic market share (consumption) have mutual recognition arrangements.
- Standard changes in US or EU have direct impact for consumers in other markets.
- Export oriented countries have to adapt to the conditions set.
- A common international understanding on organic (Codex Alimentarius, IFOAM standard) is more important than ever.
Thank you very much!

Is this organic?

Beate Huber
beate.huber@fibl.org
www.fibl.org