The World of Organic Agriculture:
Regulations and Certification
Emerging Trends 2017

Beate Huber

Countries Drafting Organic Regulation

Trends in regulations: Enforcement

EU Revision of the regulation is staggering
EU Enforcement:
- Auditing scheme by FVO to audit CB’s operating in Third Countries as well as member states and recognized third countries
- 2014: 1 CB, 7 countries
- 2015: 4 CBs, 8 countries
- 2016: 3 CBs, 5 countries (published reports)
- CB’s losing recognition (ETKO…)
- Specific guidelines for additional controls for organic products from UA, RU, Moldova

US
- Enforcement (eg Organic Integrity database)

Trends in regulations: Bilateral agreements among governments

US: 81 approved CBs (01 to 2016)

Certification Bodies recognized for US NOP certification

Reasons for decline of approved CB’s in US

- No longer needed under equivalency arrangement
- US – CAN
- Tighter oversight of certifiers by USDA
- Lack of resources to continue providing certification services and meet the accreditation criteria.

Trends in Certification: International activities of CB’s approved by US

<table>
<thead>
<tr>
<th>Operations in</th>
<th>No of CB’s located in US</th>
<th>No of CB’s outside the US</th>
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<tbody>
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<td>26</td>
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<td>10-30 countries</td>
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<td>2</td>
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<td>30-50 countries</td>
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<tr>
<td>More than 50 countries</td>
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<tr>
<td>Total</td>
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<td>33</td>
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Ceres: 41
KIWA/BCS: 48
Control Union: 62
IMO Suisse: 33
Ecocert SA: 69

EU: 193 approved CBs

Certification Bodies recognized for Imports to the EU

Certification Bodies recognized for Imports to the EU

Operations in | No of priv. CB’s located in EU | No of CB’s from Third Countries |
<table>
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<tbody>
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<td>Up to 10 Third countries</td>
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<td>Total</td>
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Agreco: 58
Ceres: 73
KIWA/BCS: 89
Control Union: 98
IMO Suisse: 71
Ecocert SA: 126

Trends among CB’s

- Increasing complexity for international operations and workload to meet accreditation criteria
- Most CB’s are only operating nationally/eventually regionally
- Joint ventures and takeovers, e.g. Ecocert/IMO, Ecocert/Argencert, CCPB/IMC
- Increasing concentration on international level (Ecocert/IMO, Control Union, KIWA/BCS, Ceres)

Outlook

- Regulations
  - Enforcement and small steps towards harmonization
  - New countries are reluctant
- Bi- and Multilateral agreements
  - Political trends: «US first», Brexit
  - Complexity on international trade will increase
- Increasing concentration among certifiers: few certifiers becoming global players
- Risk or opportunity?
Thank you very much

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