The World of Organic Agriculture:

Regulations and Certification

Emerging Trends 2008

Beate Huber

# Organic Regulations by Continent

<table>
<thead>
<tr>
<th>Country</th>
<th>Countries with regulations</th>
<th>Countries 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 Caribbean</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><strong>Total</strong></td>
<td><strong>55</strong></td>
<td><strong>193</strong></td>
<td><strong>33%</strong></td>
</tr>
</tbody>
</table>
Organic Regulations by Continent

Countries Drafting Regulations

› Europe: Bosnia and Herzegovina, Russia, Ukraine

› 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
# Certification Bodies by Continent

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Asia</td>
<td>147</td>
<td>93</td>
<td>117</td>
<td>91</td>
<td>83</td>
</tr>
<tr>
<td>Europe</td>
<td>172</td>
<td>160</td>
<td>157</td>
<td>143</td>
<td>130</td>
</tr>
<tr>
<td>Latin America and Carribean</td>
<td>47</td>
<td>43</td>
<td>43</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>North America</td>
<td>83</td>
<td>80</td>
<td>84</td>
<td>97</td>
<td>101</td>
</tr>
<tr>
<td>Oceania</td>
<td>11</td>
<td>11</td>
<td>11</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>468</strong></td>
<td><strong>395</strong></td>
<td><strong>419</strong></td>
<td><strong>385</strong></td>
<td><strong>364</strong></td>
</tr>
</tbody>
</table>

Source: The Organic Standard 08/07

Development Certification Bodies

Source: The Organic Standard 08/07

## Countries with most CB’s

<table>
<thead>
<tr>
<th>Country</th>
<th>2007</th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>60</td>
<td>59</td>
<td>60</td>
</tr>
<tr>
<td>Japan</td>
<td>55</td>
<td>35</td>
<td>69</td>
</tr>
<tr>
<td>South Korea</td>
<td>33</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>China P.R.</td>
<td>32</td>
<td>32</td>
<td>26</td>
</tr>
<tr>
<td>Germany</td>
<td>32</td>
<td>31</td>
<td>31</td>
</tr>
<tr>
<td>Spain</td>
<td>28</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>Canada</td>
<td>23</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td>Brazil</td>
<td>21</td>
<td>18</td>
<td>18</td>
</tr>
</tbody>
</table>

Source: The Organic Standard 08/07
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
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

- Single import permits (source: OFIS database)
  - EU:
    - Europe: 34
    - North America: 21
    - Latin America: 8
    - Oceania: 3
    - Africa: 5
    - Asia: 2
# Acceptance of local CB’s in EU/US

<table>
<thead>
<tr>
<th>Country</th>
<th>EU</th>
<th>US</th>
</tr>
</thead>
</table>
| China   | 471 import permits  
1 by Chinese CB  
16 by non-Eur. CB’s | 0 chinese CB’s approved |
| India   | 5 (11) Indian CB’s on Third Country List | Recognition of Indian government conformity assessment |
| Peru    | 190 import permits  
24 by Peruvian CB  
10 by US based CB’s | 1 Peruvian CB approved |
| Tunisia | 86 import permits  
0 by non-Europ. CB’s | 0 Tunesian CB approved |
Conclusions/Summary

- Development of organic legislation in Latin America, Asia and Africa
- Harmonization and/or mutual recognition on international level is still a long way to go
- The system of single import permits preferences Western certification bodies
- National legislation of organic agriculture does not necessarily facilitate recognition by importing countries (EU, US...)
The World of Organic Regulations is getting more and more complex
and is the farmer who has to pay the bill...