



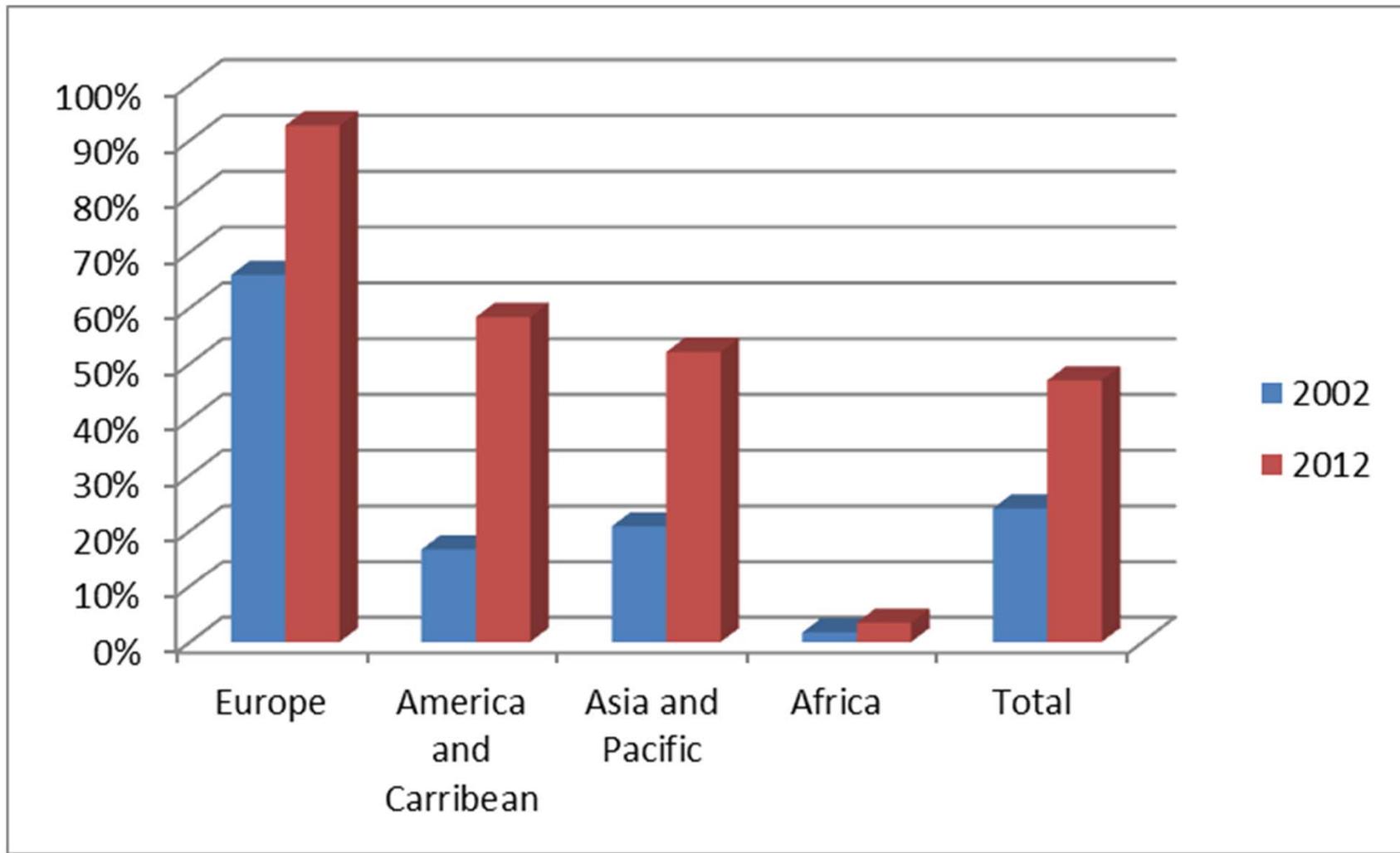
The World of Organic Agriculture:

Regulations and Certification Emerging Trends 2013

› Beate Huber

Organic Regulations by Continent (2011)

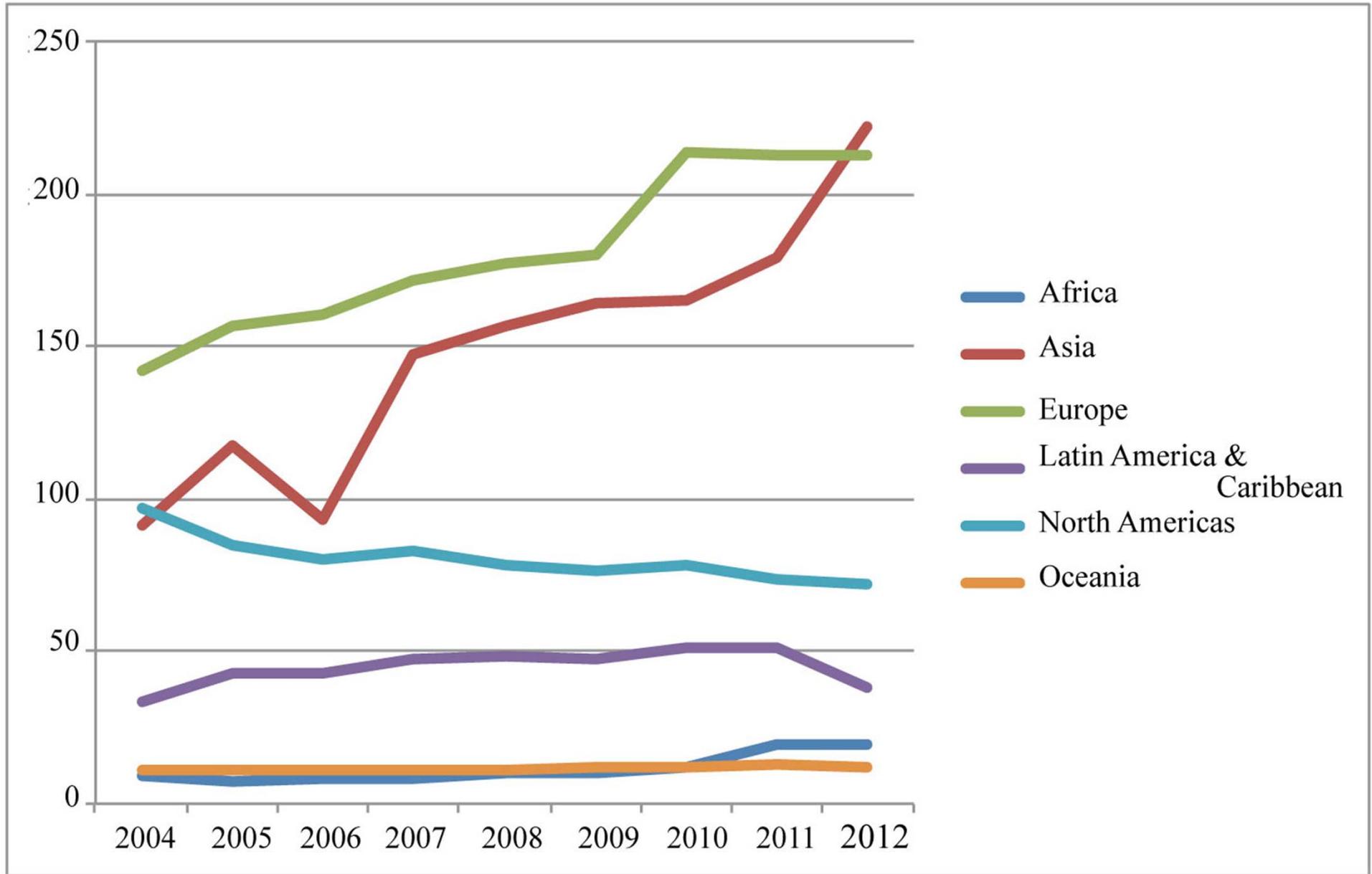
| | Countries with Regulations 2002 | Countries with Regulations 2012 | |
|-----------------------|---------------------------------|---------------------------------|--|
| Europe | 27 | 38 | EU 27 Other: 11  |
| America and Caribbean | 6 | 21 |    |
| Asia and Pacific | 10 | 25 |    |
| Africa | 1 | 2 | |
| Total | <u>44</u> | <u>86</u> | |



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**

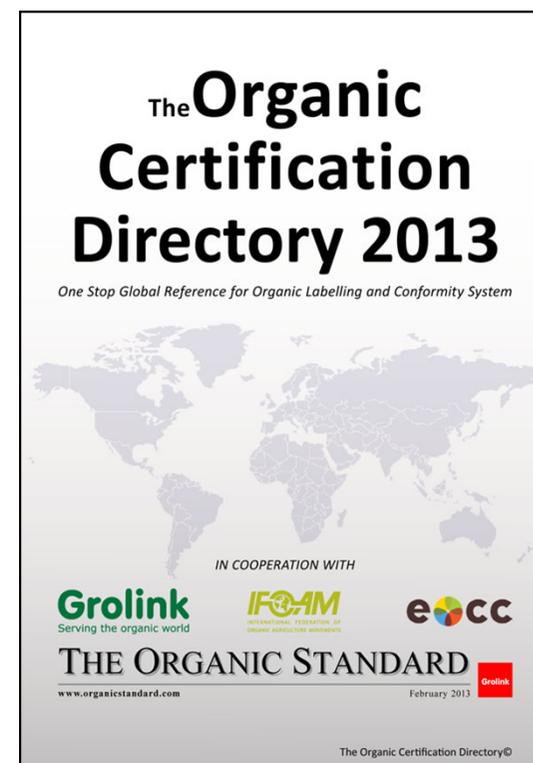
Certification bodies per region



Countries with most certifiers

| Country | 2012 | 2011 | 2011 |
|-------------|------|------|------|
| South Korea | 76 | 33 | 33 |
| Japan | 61 | 61 | 61 |
| USA | 49 | 51 | 51 |
| Germany | 32 | 31 | 31 |
| Spain | 27 | 28 | 28 |
| China P.R. | 24 | 28 | 28 |
| India | 24 | 22 | 22 |
| Canada | 23 | 23 | 23 |
| Romania | 17 | 17 | 17 |
| Italy | 13 | 13 | 13 |
| Poland | 11 | 11 | 11 |
| Bulgaria | 10 | 10 | 10 |
| France | 10 | 7 | 7 |

The Organic Standard
Hall 4 Stand 344

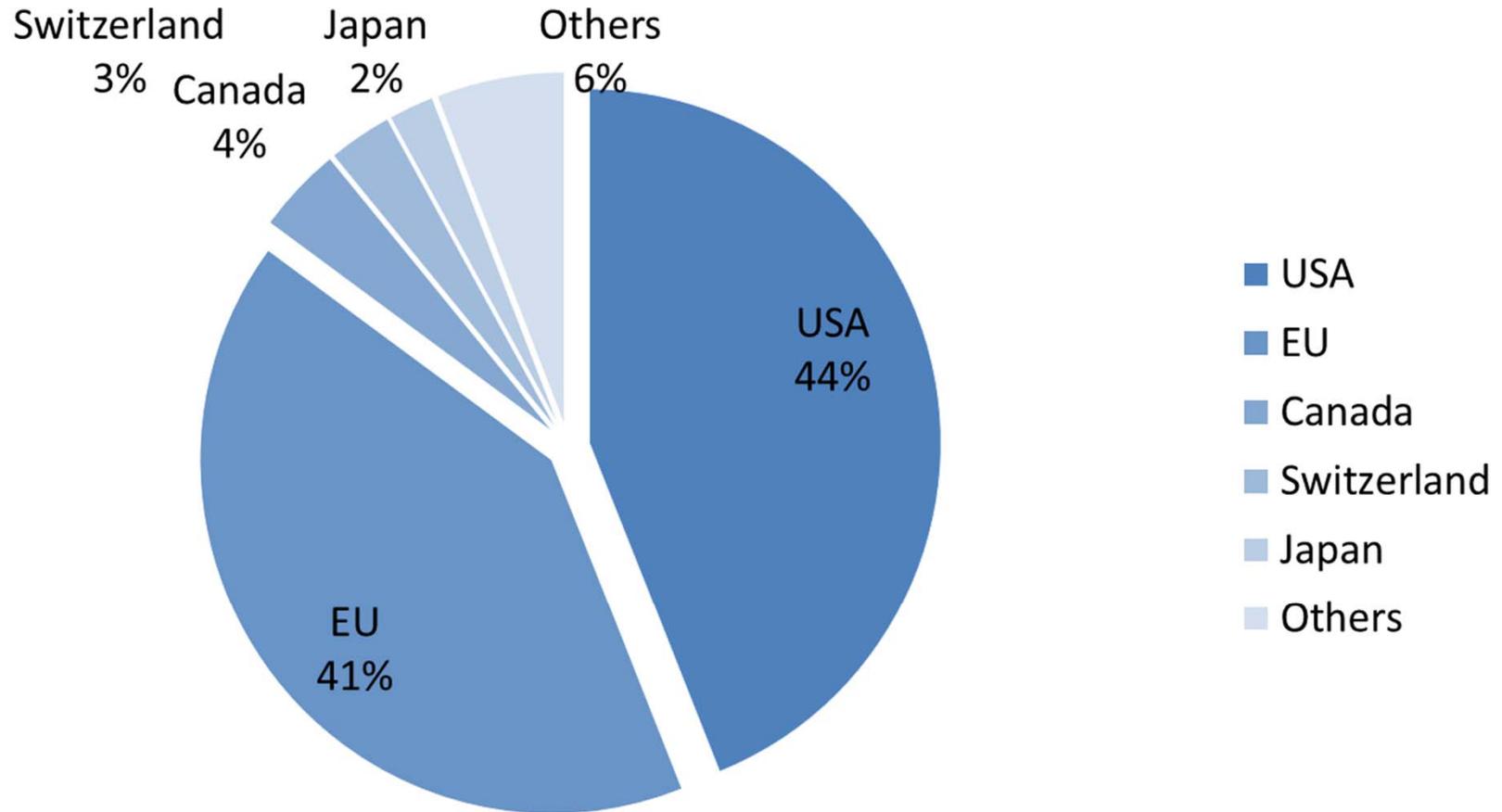


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THE ORGANIC STANDARD
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Latest Trendes

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



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!



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