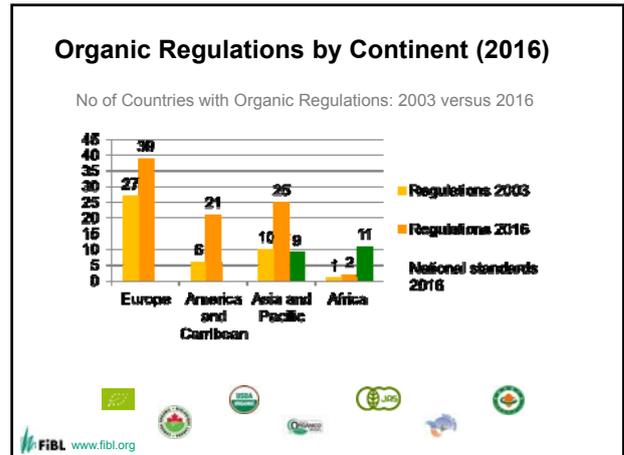


FiBL Forschungsinstitut für biologischen Landbau
 Institut de recherche de l'Agriculture Biologique
 Research Institute of Organic Agriculture
 Forschungsinstitut für biologischen Landbau

EXCELLENCE FOR SUSTAINABILITY

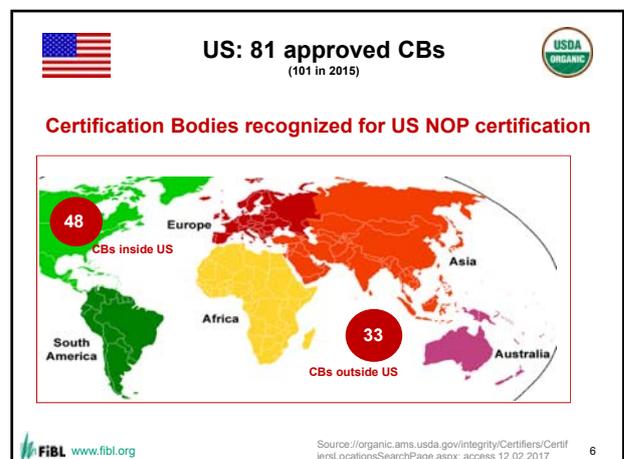
The World of Organic Agriculture: Regulations and Certification Emerging Trends 2017

> Beate Huber



- ### 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 - US - CAN (2009)
 - > US - EU (2012)
 - > US - Japan (2014)
 - > US - Korea (2014)
 - > US - Switzerland (2015)
 - > US-Mexico
 - > EU - Switzerland (2002 - trade agreement)
 - > Canada (2011)
 - > US (2012)
 - > Korea (2015)
 - > CAN - US (2009)
 - > EU (2011)
 - > Switzerland (2012)
 - > Costa Rica (2013)
 - > Japan (2015)
- Multilateral agreements?**
- Labels on map: United Kingdom?, Mexico, EU, US, Korea, Japan, Switzerland, Canada, Costa Rica



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.

FIBL www.fibl.org 7

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

| Operations in | No of CB's located in US | No of CB's outside the US |
|-------------------------------|--------------------------|---------------------------|
| Only US or up to 10 countries | 47 | 26 |
| 10-30 countries | 1 | 2 |
| 30-50 countries | 0 | 2 |
| More than 50 countries | | 3 |
| Total | 48 | 33 |

Ceres: 41
 KIWA/BCS: 48
 Control Union: 62
 IMO Suisse: 32
 Ecocert SA: 69

FIBL www.fibl.org 8

EU: 193 approved CBs (223 in 2015)

Certification Bodies recognized for Imports to the EU

Source: //ec.europa.eu/agriculture/organic/eu-policy/eu-rules-on-trade/non-eu-trading-partners/index_en.htm; access 11.02.2015

FIBL www.fibl.org 9

Trends in Certification: International activities of CB's approved by EU

| Operations in | No of priv. CB's located in EU | No of CB's from Third Countries |
|--------------------------|--------------------------------|---------------------------------|
| Only EU | 178 | n.a. |
| Up to 10 Third countries | 1 | 28 |
| 10-30 countries | 5 | 11 |
| 30-50 countries | 3 | |
| More than 50 countries | 6 | |
| Total | 193 | 39 |

Agreco: 58
 Ceres: 73
 KIWA/BCS: 89
 Control Union: 98
 IMO Suisse: 71
 Ecocert SA: 126

FIBL www.fibl.org 10

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)

FIBL www.fibl.org 11

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?

FIBL www.fibl.org 12

Thank you very much

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

- > fibl.org
- > [youtube.com/fiblfilm](https://www.youtube.com/fiblfilm)
- > twitter.com/fiblog
- > facebook.com/FiBLnews

