

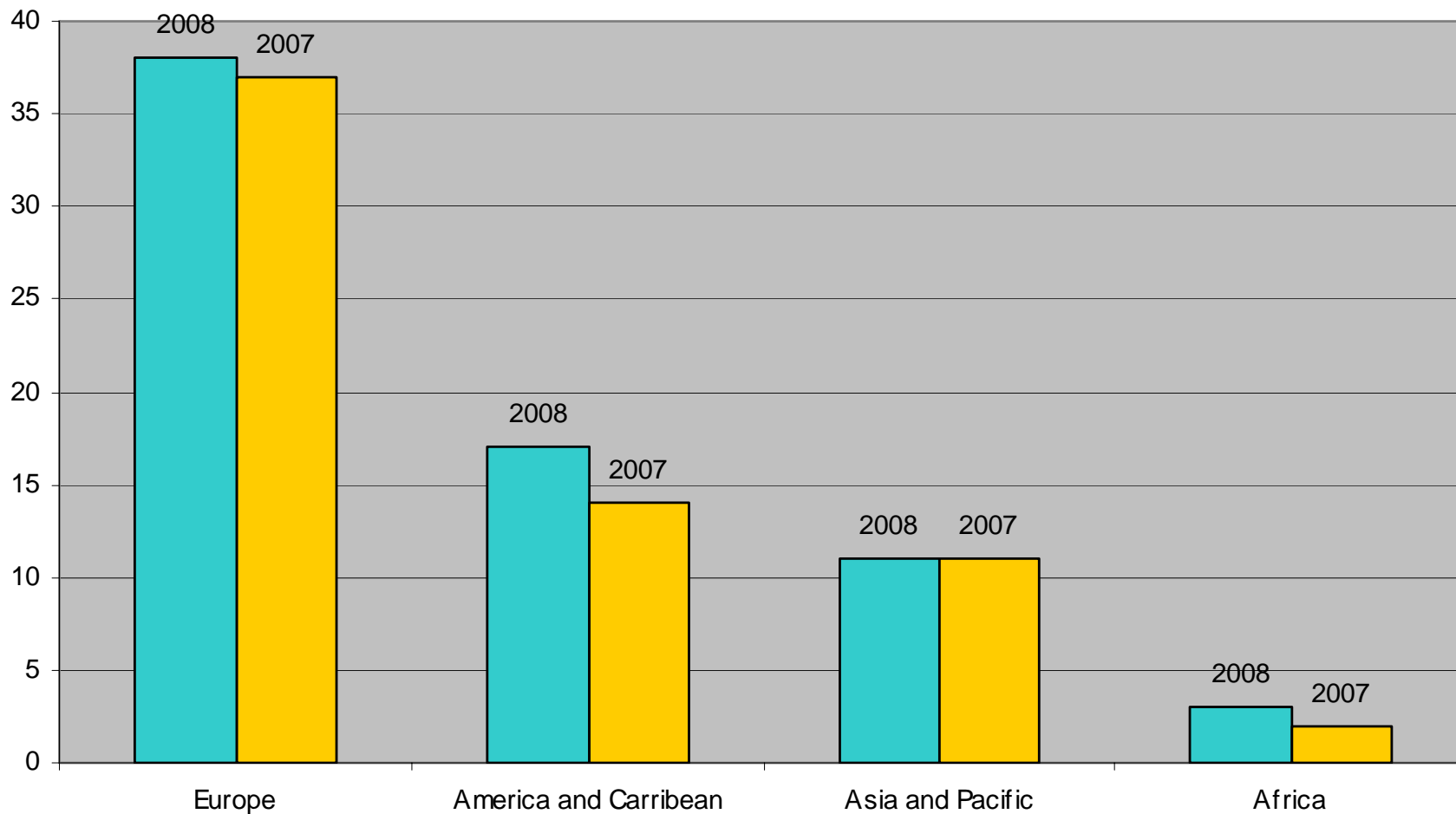
The World of Organic Agriculture: Regulations and Certification Emerging Trends 2008

➤ **Beate Huber**

Organic Regulations by Continent

Country	Countries with regulations	Contries per continent	Percentage
Europe	39	41	95%
America and Carribbean	17	35	49%
Asia and Pacific	11	62	18%
Africa	3	55	5%
Total	55	193	33%

Organic Regulations by Continent



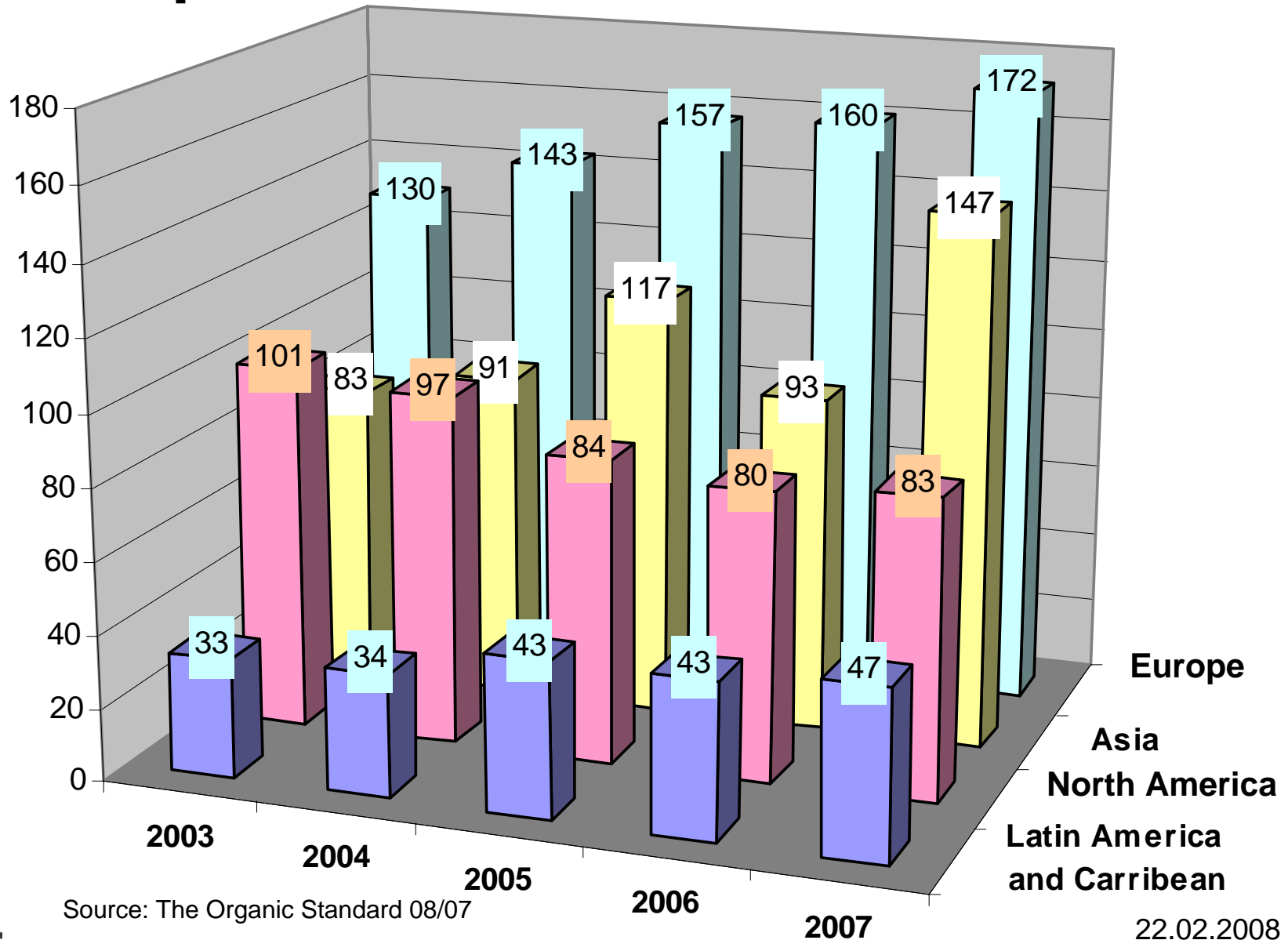
Countries Drafting Regulations

- **Europe: Bosnia and Herzegovina, Russia, Ukraine**
- **Armenia, Azerbaijan, Hong Kong, Indonesia, Lebanon, Saudi Arabia, Vietnam**
- **America and Carribean: Cuba, Nicaragua, St Lucia**
- **Africa: Cameroon, Egypt, Kenya, Madagascar, South Africa, Tanzania, Zambia**

Certification Bodies by Continent

Region	2007	2006	2005	2004	2003
Africa	8	8	7	9	7
Asia	147	93	117	91	83
Europe	172	160	157	143	130
Latin America and Carribbean	47	43	43	34	33
North America	83	80	84	97	101
Oceania	11	11	11	11	10
Total	468	395	419	385	364

Development Certification Bodies



Source: The Organic Standard 08/07

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Countries with most CB's

	2007	2006	2005
USA	60	59	60
Japan	55	35	69
South Korea	33	2	1
China P.R.	32	32	26
Germany	32	31	31
Spain	28	26	25
Canada	23	21	24
Brazil	21	18	18

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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

	EU 	US 
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
Tunesia	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...**

