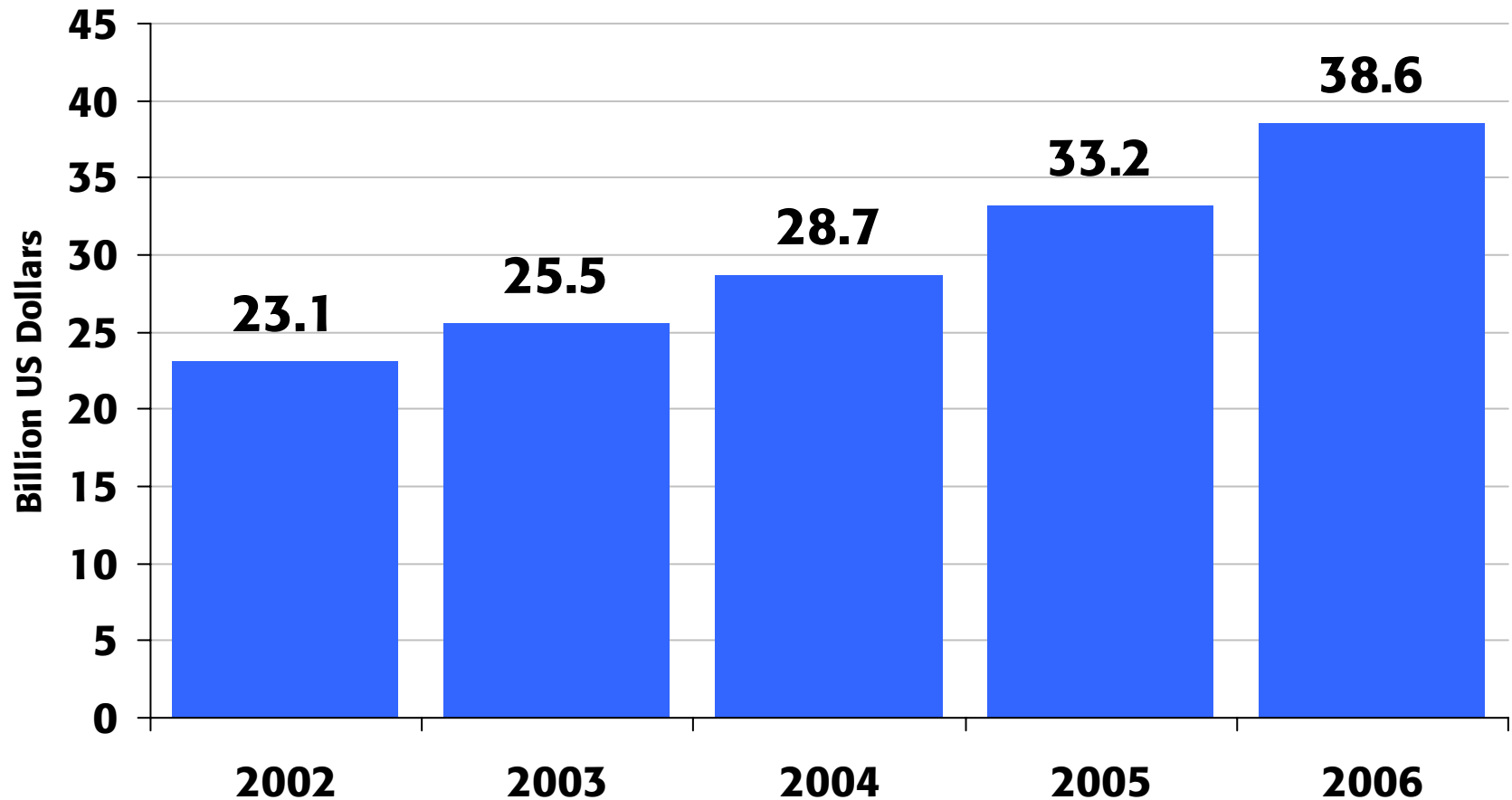


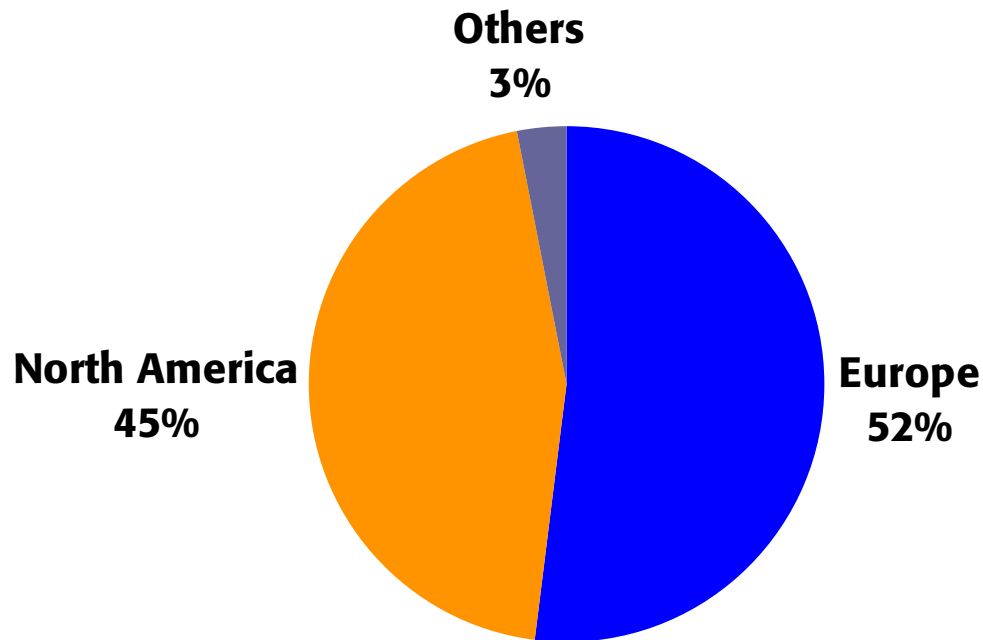
Organic Products sold worldwide



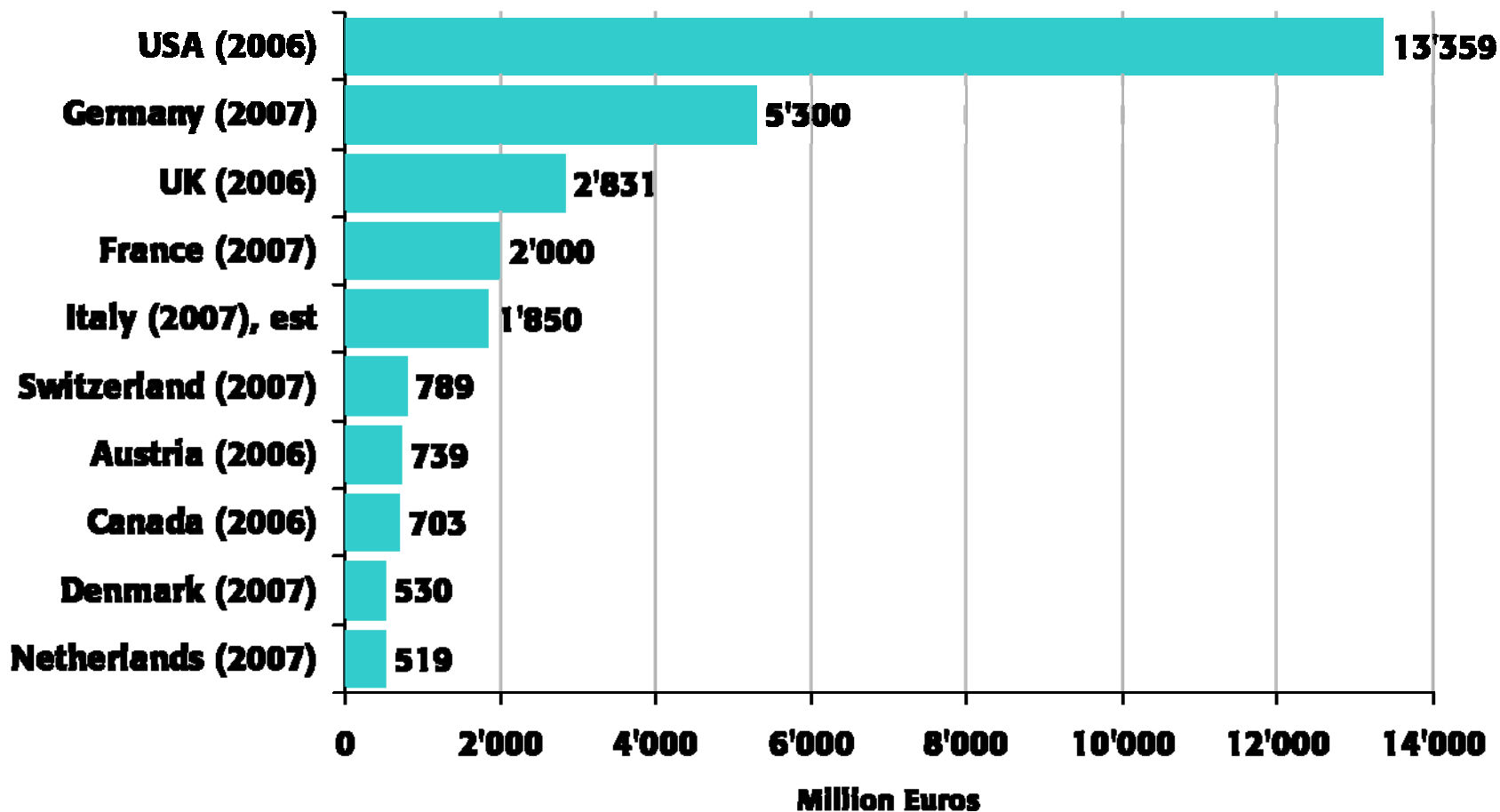
Growth of the global market for organic food and drink



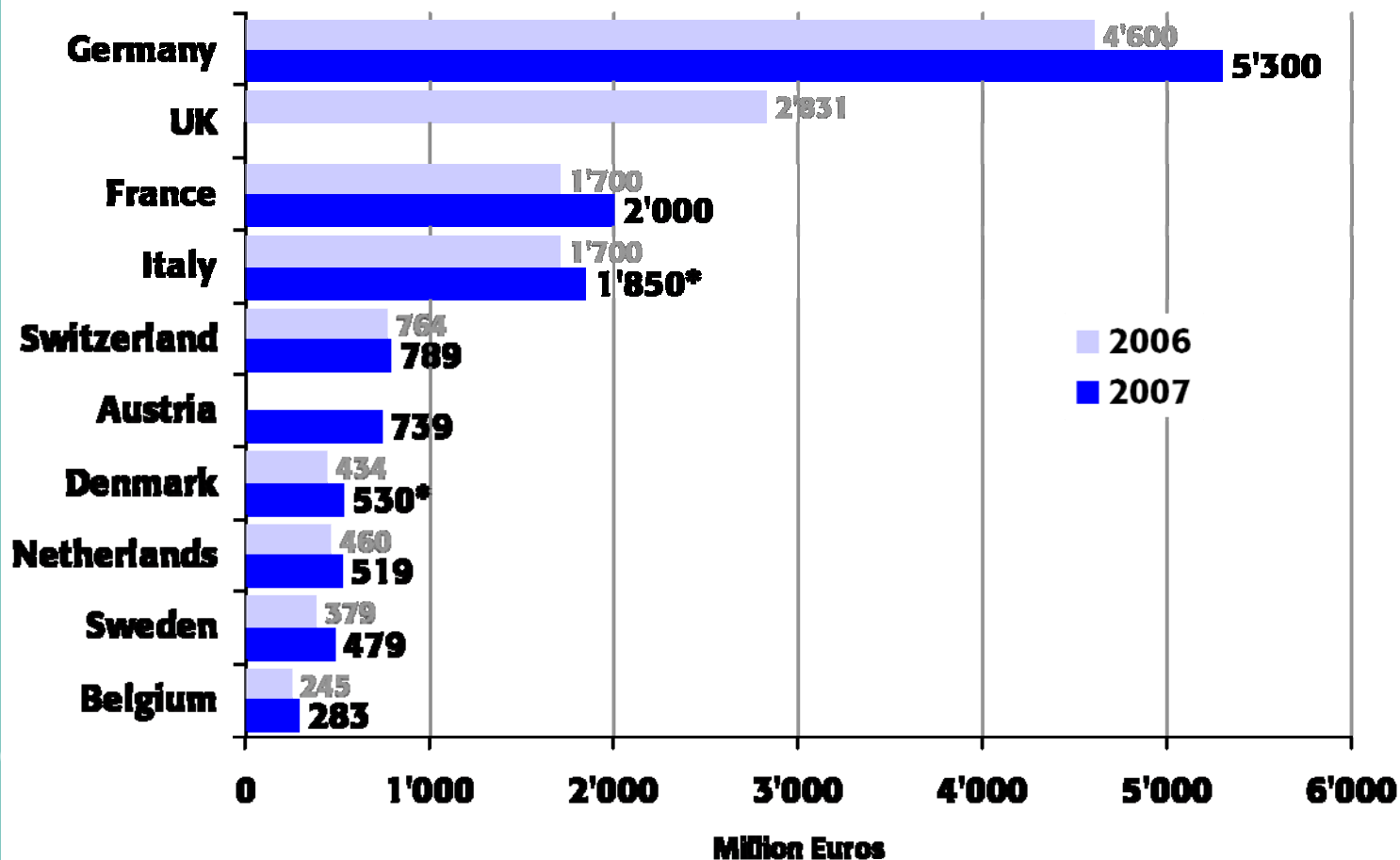
Distribution of global revenues with organic food and drink 2006



Organic markets: The ten leading countries



Development of major European markets 2006/ 2007



Source: Survey by FiBL, ZMP, Aberystwyth University, Agromilagro
Research

*Estimate

Round Table Kyiv 05.11.2008

The regulated organic world

US-
NOP

EU-Reg.
ISO 65

JAS



Canada

China

National
Requirements



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%

Countries Drafting Regulations

- **Europe: Ukraine, Russia, Bosnia and Herzegovina**
- **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**

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

- **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**

Conclusions

- Organic markets are fast growing markets
- Growing markets provide marketing opportunities for newcomers
- Ukraine has a huge potential for exports to Europe
- Governments can stimulate organic agriculture by providing supportive frameworks
- Organic legislation for
 - Local market development (preventing unfair competition and misleading labeling)
 - Facilitating market access in export countries



Thank you very much !