

# Welcome!



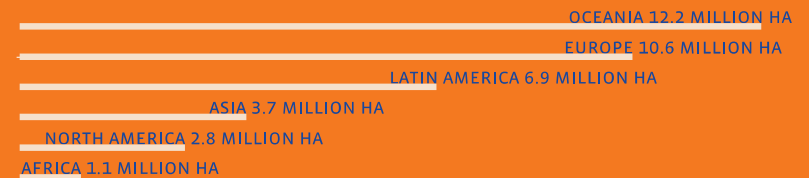
## Global Market overview



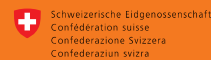
FiBL AND IFOAM

## THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2013



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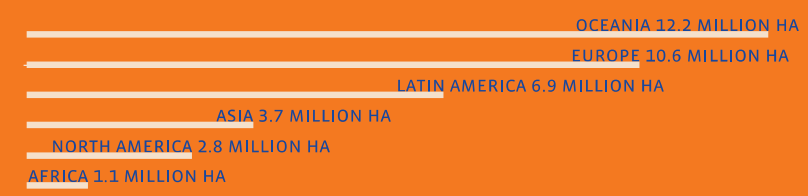
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FiBL AND IFOAM  
**THE WORLD OF ORGANIC AGRICULTURE**  
 STATISTICS & EMERGING TRENDS 2013



757 AFFILIATES  
115 COUNTRIES

40 YEARS  
LEADING,  
UNITING  
AND  
ASSISTING  
THE  
WORLDWIDE  
ORGANIC  
MOVEMENT.



International  
Federation of  
Organic  
Agriculture  
Movements

It unites, leads  
and assists the  
organic  
movement in  
its full diversity



BE PART OF THE GLOBAL ORGANIC  
MOVEMENT. APPLY TODAY.

1.8 mil certified farmers  
70 million ha land  
63 billion US\$ consumer  
purchases



## THE DEFINITION OF ORGANIC AGRICULTURE

Organic Agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects. Organic Agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved.



## THE PRINCIPLES OF ORGANIC AGRICULTURE

Organic Agriculture is based on the principles of health, ecology, fairness and care.

## THE SCOPE OF ORGANIC AGRICULTURE

IFOAM regards any system that is based on the Principles of Organic Agriculture and uses organic methods, as 'Organic Agriculture' and any farmer practicing such a system as an 'organic farmer'. This includes various forms of certified and non-certified Organic Agriculture. Guarantee Systems may be for instance third party certification, including group certification, as well as participatory guarantee systems.

## STANDARDS & REGULATIONS: THAT'S ORGANIC WORLDWIDE

The IFOAM Family of Standards draws the line between organic and not organic. It contains all standards and regulations that have passed an equivalence assessment against a normative reference approved by IFOAM's membership. IFOAM encourages governments and standard users to recognize other standards in the Family as equivalent.

**ORGANIC IFOAM FAMILY OF STANDARDS**

**That's Organic - Worldwide.**

**GLOBAL**  
IFOAM Standard  
International Standard for Natural Substances Products (ISNP)

**AFRICA**  
Kenyan Organic Regulation  
African Standards for Organic Production, South Africa  
Basic Tenets of Organic Agriculture in Senegal  
E-Cert Organic Standards, Kenya  
Organic Standards Association Standard, South Africa  
Tanzanian Organic Standards, Tanzania  
Ugandan Organic Certification Ltd. Private Standards, Uganda

**ASIA**  
China Organic Regulation  
India Organic Regulation  
Japan Organic Regulation

**EUROPE**  
Euro Organic Regulation  
Switzerland Organic Regulation  
Turkey Organic Regulation  
Biological Standards, Switzerland  
Organic Controls Standards for Organic Production and Processing, Benin and Benin region  
Netherlands Private Standards, France  
BioFach v.a Private Standards, Germany  
Ecoland Standards, Germany  
GMO Private Standards, Germany  
National Standards, Germany  
International Basic Standards of Organic Production, Hungary  
ECOF Global Standard, Italy  
Italian Organic Standard, Italy

**OCEANIA**  
Australian Standard - Organic and Biodynamic Products  
Australia  
NZQA Organic Standard, Australia  
New Zealand Organic Standard, New Zealand  
BioGrowth Organic Standards, New Zealand

**NORTH AMERICA**  
Canada Organic Regulation  
USA Organic Regulation  
USDA Organic Standards, Dominica  
ECOF Global Market Access Standard, USA  
Farm Verified Organic Private Standards, USA  
NORCA Standards for Organic Land Care, USA

**Other regions listed:** Costa Rica Organic Regulation, Argentina Organic Standard, Argentina, Peru IFOAM Standard, Argentina, USA Organic Standards, Argentina, Iceland Private Standards, Iceland, IBD Organic Guidelines, Brazil, Canada Organic Regulation, USA Organic Regulation, Organic Standards, Dominica, ECOP Global Market Access Standard, USA, Farm Verified Organic Private Standards, USA, NORCA Standards for Organic Land Care, USA.

\* Compliance with the IFOAM Standard  
\*\* Part of the IFOAM Community of Best Practice  
Note: Applicant standards are marked in grey  
Family Standards Event, May 15, 2011  
www.ifoam.org/ags

# Organic Landmarks

- Definition
- Principles
- Scope
- Family
- Positions
- Policy Briefs

## IFOAM POSITIONS

IFOAM has developed positions on a range of topics. These include: Use of Nanotechnologies and Nanomaterials in Organic Agriculture; The use of Organic Seed and Plant Propagation in Organic; The Role of Smallholders in Organic Agriculture; The Full Diversity of Organic Agriculture; The Role of Organic Agriculture in Mitigating Climate Change; Smallholder Group Certification for Organic Production and Processing; Position on Genetic Engineering and Genetically Modified Organisms; Organic Agriculture and Food Security; Organic Agriculture and Biodiversity.



## That's Organic - Worldwide.



### **IFOAM** IFOAM Standard

International Standard for Forest Garden Products (FGP)



*Tunisia Organic Regulation*

*East African Organic Products Standard*

EnCert Organic Standards, Kenya

Basic Norms of Organic Agriculture in Senegal, Senegal

Afrisco Standards for Organic Production, South Africa

Siyavuna Organic Standards, South Africa

Organic Standards for Tancert, Tanzania

Uganda Organic Standard, Uganda



*Saudi Arabia Organic Regulation*

*China Organic Regulation*

*India Organic Regulation*

*Israel Organic Regulation*

Note: Applicant standards are marked in grey.

*Japan Organic Regulation*

OFDC Organic Certification Standard, China

Hong Kong Organic Resource Center Standard, Hong Kong

IBOAA Organic Agriculture Standard, Israel

Japan Organic & Natural Foods Association Organic Standard, Japan

MASIPAG Organic Standards, The Philippines

CONU Organic Standard, South Korea

DCOK, LLC International Standards, South Korea

GOAA International Standards, South Korea

ACT Basic Standard, Thailand

Vietnam PGS Standards, Vietnam



*National Standard for Organic and Bio-Dynamic Produce, Australia*

*New Zealand Organic Export Regulation*

*Pacific Organic Standard, Pacific Community*

Australian Certified Organic Standard, Australia

NASAA Organic Standard, Australia

AsureQuality Organic Standard, New Zealand

BioGro Organic Standards, New Zealand

Family Standards Frame: March 15, 2012.



*EU Organic Regulation*

*Switzerland Organic Regulation*

*Turkey Organic Regulation*



**Bio Suisse Standards, Switzerland**

Organska Kontrola Standards for production and processing, Bosnia and Herzegovina

Biocyclic Standards, Cyprus

Nature & Progrès Standards, France

BioPark Guidelines for Organic Production and Processing, Germany

Ecoland Standards for Organic Agriculture and Food Production, Germany

Ecowellness Standard, Germany

Gäa Private Standards, Germany

Naturland Standards, Germany

CCPB Global Standard, Italy

Italian Organic Standard, Italy

Krav Standards, Sweden



**SOUTH AMERICA**

*Argentina Organic Regulation*

*Costa Rica Organic Regulation*

Argencert Organic Standard, Argentina

Click on each standard to see more details.

LETIS IFOAM Standard, Argentina

OIA Organic Standards, Argentina

Bolicert Organic Standard for Production and Handling, Bolivia

Guidelines for the IBD Quality Organic Standard, Brazil



**NORTH AMERICA**

*Canada Organic Regulation*

*USA Organic Regulation*

DOAM Organic Standards, Dominica

Red Mexicana de Tianguis y Mercados Orgánicos' Standard, Mexico

CCOF Global Market Access Standard, USA

Farm Verified Organic Requirements Manual, USA

NOFA Standards for Organic Land Care, USA

QCS Int. Program Standard Manual, USA

*THE FAMILY OF STANDARDS* contains all standards officially endorsed as organic by the Organic Movement, based on their equivalence with the Common Objectives and Requirements of Organic Standards. Both private standards and government regulations are admissible.

[www.ifoam.org/ogs](http://www.ifoam.org/ogs)





13-15 October 2014  
Lütfi Kırdar Congress Center



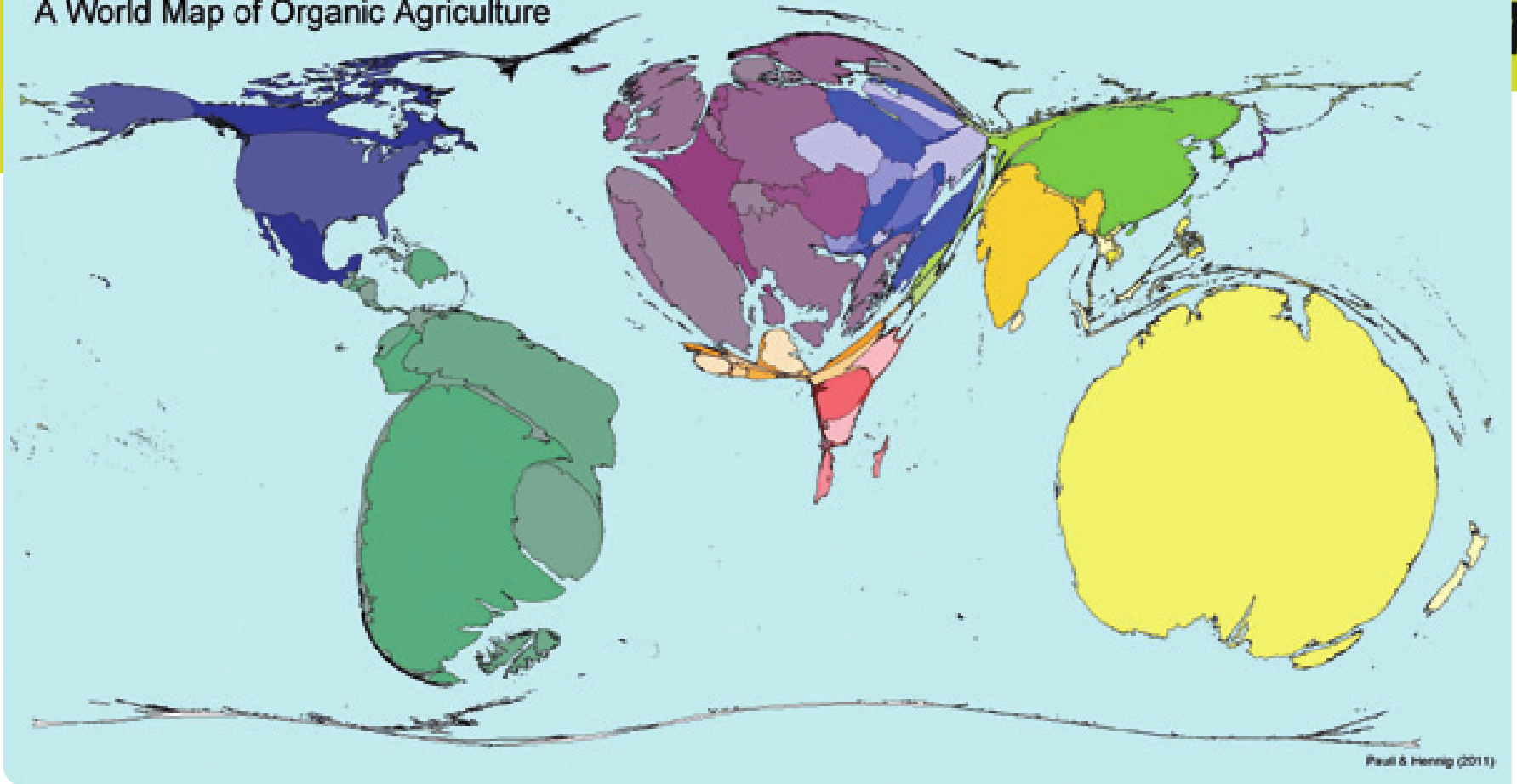
# Save the date!

## 18<sup>th</sup> IFOAM Organic World Congress, October 13-15 2014

*Building Organic Bridges in Istanbul*

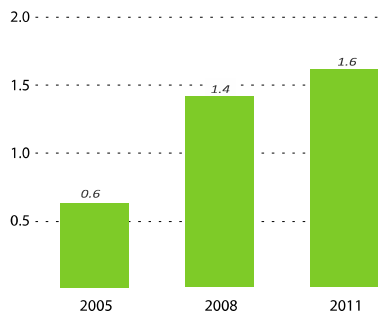


# A World Map of Organic Agriculture



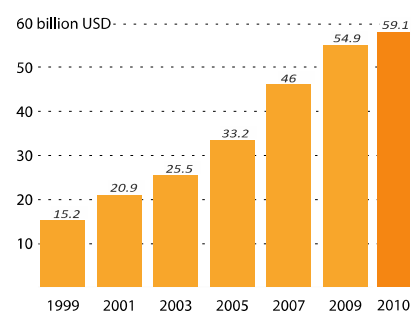
The size of the countries represent, proportionally, certified organic area with overall 37 million hectares worldwide. The total organic certified land is 80 million hectares.

Organic Producers (in millions), 2005 - 2011



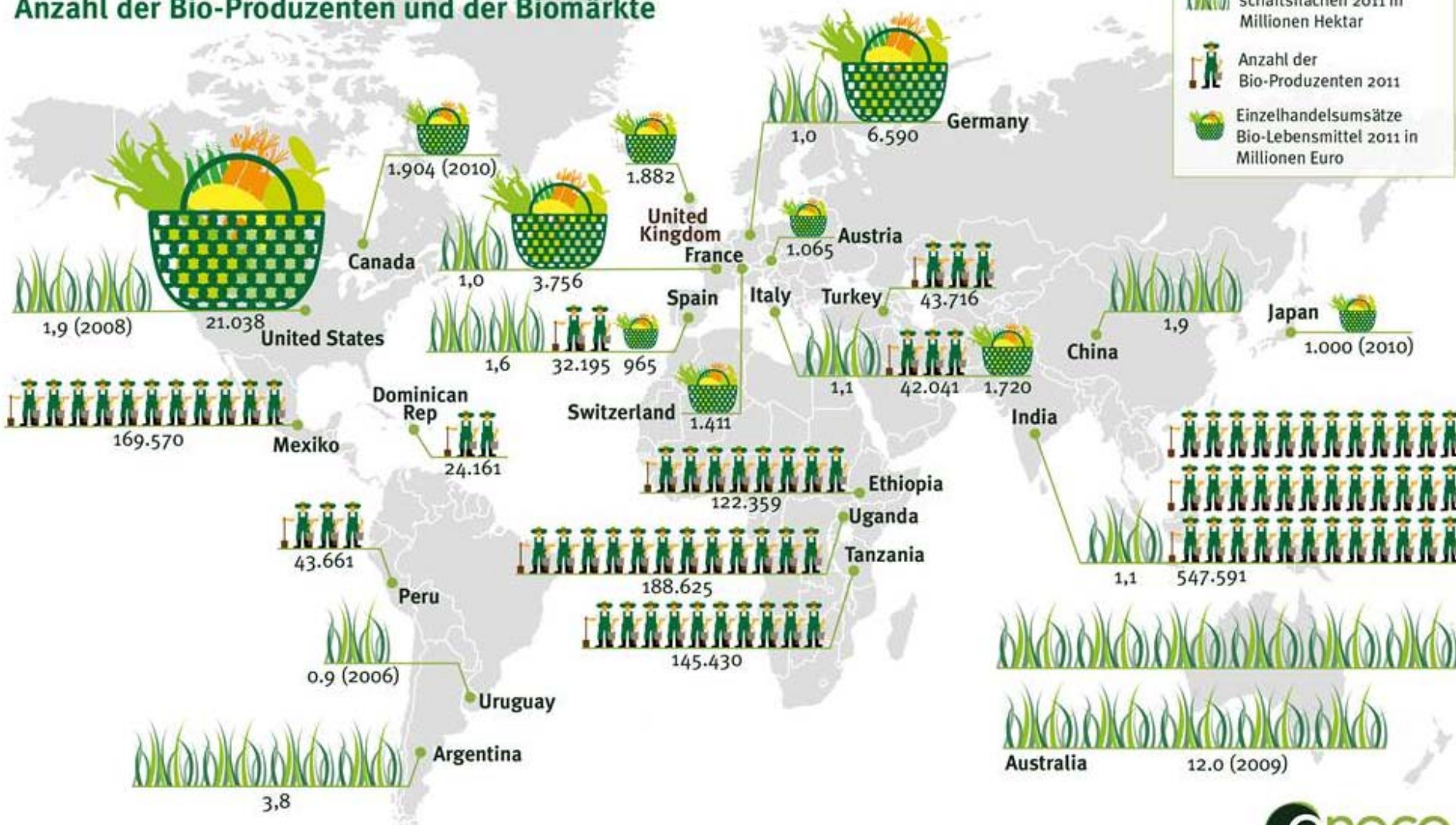
Note: Graphs refer to certified organic only.

Organic Market Size (in billion USD) 1999 - 2010



# Top 10 der Länder der Bio-Anbauflächen, der Anzahl der Bio-Produzenten und der Biomärkte

- Bio-zertifizierte Landwirtschaftsflächen 2011 in Millionen Hektar
- Anzahl der Bio-Produzenten 2011
- Einzelhandelsumsätze Bio-Lebensmittel 2011 in Millionen Euro





# Organic Agriculture 2013: Key Indicators and Leading Countries



Indicator	World	Leading countries
Countries with data on certified organic agriculture <sup>1</sup>	2011: 162 countries	
Organic agricultural land	2011: 37.2 million hectares (1999: 11 million hectares)	Australia (12 mio. hectares, 2009) Argentina (3.8 mio. hectares) US (1.9 mio. hectares, 2008)
Share of total agricultural land	2011: 0.86 % <sup>2</sup>	Falkland Islands (Malvinas) (35.9 %) Liechtenstein (29.3 %) Austria (19.7 %)
Further, non-agricultural organic areas (mainly wild collection)	2011: 32.5 million hectares (2010: 43 million hectares; 2009: 41 million hectares)	Finland (7 million hectares) Zambia (5.9 million hectares; 2009) India (4.5 million hectares)
Producers	1.8 million producers (2010: 1.6 million producers; 2009: 1.8 million producers)	India (547'591), Uganda (188'625, 2010), Mexico (169'570)
Organic market size	62.9 billion US dollars (2010: 59.1 billion US dollars 1999: 15.2 billion US dollars) Source: Organic Monitor	US (21 billion euros or 29 billion US dollars), Germany (6.6 billion euros or 9.2 billion US dollars) France (3.7 billion euros or 5.2 billion US dollars)
Per capita consumption	2011: 9.02 US dollars <sup>3</sup>	Switzerland (177.4 euros or 250.4 USD), Denmark (161.9 euros or 225.7 USD) Luxemburg (134.3 euros or 187.3 USD)
Number of countries with organic regulations 2011	86 countries (2010: 84 countries)	
Organic certifiers 2010	2012: 576 certifiers (2011: 549; 2010 532)	South Korea, Japan, USA
Number of IFOAM affiliates	1.1.2013: 766 affiliates from 117 countries	Germany: 96 affiliates; India: 46 affiliates; China: 40 affiliates; United States: 33 affiliates; The Netherlands: 31 affiliates

Source: FiBL and IFOAM; for total global market: Organic Monitor; for number of certifiers: Organic Standard/Grolink.

## The Speakers

- **Matthew Holmes**, OTA, Canada and IFOAM World Board  
**North America** markets, 12 minutes
- **Ming Liu**, IPD Organics Brazil,  
**Latin American** markets, 12 Minutes
- **Helga Willer**, FiBL, Switzerland  
**European** markets, 15 minutes
- **Michael Baker**, Chief Certification Officer ACO, Australia  
**Oceania** markets 12 minutes
- **Markus Arbenz**, IFOAM Executive Director, Moderation



Thank you for  
your attention!





- We want to provide Latest Figures and Trends from the most important markets around the globe: Europe, North America, Australia, Brazil and Japan. Unfortunately I haven't found anybody yet for Japan, but the other markets are well covered with great experts.
- We would like to use the 90 minutes as follows:
  1. Opening by me. I will summarize in 1-2 minutes the global market figures and explain, what has been discussed in the session about the statistics and emerging trends. And I will introduce you.
  2. We start in the biggest market: North America. Matthew Holmes (Canada) presents for 10 -12 minutes. Interesting features about the North American Market developments with (apart from the latest figures) focus on consumers concerns and hot issues. What kind of discussion are going on and what has to be taken into account in order to be successful in the market in 2013

In case you keep your time (or are even shorter, I come back to Matthew with 1 -2 spontaneous questions.

3. We stay in America and repeat what we did for North America. Ming Liu will present for Latin American markets (not production and export, but sales to consumers) with a special focus on Brazil. Again 10 - 12 minutes and focus on consumers concerns and hot issues. It will be interesting to see the differences to North America. And again I will interview with 1-2 spontaneous questions if time allows.
4. The same procedure for Europe. We don't go in all the European markets (there is a special session for that), but have Europe as whole in the focus. Helga Willer may take 15 minutes, since Europe is rather complex.
5. Last but not least we go to Australia and we do the same there. Michael Baker will present 10-12 minutes and I will ask questions.

I will make a last attempt to find an Asian (preferably Japan) speaker. If I don't find we will simply skip that part.

After all that we would like to answer to questions from the audience and try to make a synergy out of the contributions in a short panel discussion. And I want to make sure you get the opportunity for a final statement in the panel.