THE ORGANIC STANDARD

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Grolink

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Certification special

This month your subscription copy of **The Organic Standard** is shorter than usual because it is accompanied by **The Organic Certification Directory**, which is sent out as a separate document**.** This issue of TOS includes an update on the world of organic certification.

We hope you will enjoy the special edition and **The Organic Certification Directory**.

World of organic certification 2013

The tenth edition of The Organic Certification Directory *was published this month (February 2013).* The Directory *lists all the organic certification bodies in the world and can be found on www.organicstandard.com/directory.*

The total number of certification bodies operating in the world in 2012 was 576, up by 27 from 549 in 2011. The majority of certification bodies are located in the European Union, followed by South Korea, Japan, the United States, China, India and Canada. The global increase in numbers is mostly due to a growth in Asia, with the largest increase in South Korea. However, for the first time ever, the combined countries in Asia have a higher number of organic certification bodies than Europe, and South Korea and Japan actually has a higher number of certification bodies than the USA.

There has been a slight decrease in the number of certification bodies in most regions of the world other than Asia. The largest decrease was in Brazil which lost thirteen, then China and the United Kingdom which had four and three fewer certification bodies respectively in 2012 compared to 2011. In Brazil the decrease was mostly among the small regional and branch offices of larger certification bodies that are not on the list of government approved third party certification bodies.

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Countries with the most certification bodies

Country	2012	2011	2010
South Korea	76	33	33
Japan	61	61	59
USA	49	51	57
Germany	32	31	32
Spain	27	28	28
China P.R.	24	28	27
India	24	22	17
Canada	23	23	21
Romania	17	17	18
Italy	13	13	15
Poland	11	11	11
Bulgaria	10	10	10
France	10	7	6

Is it worth it?

The main positive development reflected in the 2013 Organic Certification Directory is the rapid increase in the number of certification bodies accepted in the EU and in the US. This is driven by the EU-US equivalence agreement and by the new EU regime for direct approval of certification bodies as being equivalent. It is encouraging to see this development and it certainly shows that recognition of other systems is more a matter of political will than a technical matter. Late in 2013 a new equivalency agreement between Canada and Switzerland was announced (for more details see TOS 141). It is important that organic products imported from third countries to countries in an equivalency agreement are included in the scope of the agreement. If such products are excluded the third countries may face reduced market access as a result of these agreements.

In Asia they still think it is fun or profitable to start organic certification bodies, while the enthusiasm in Europe and the Americas is waning. A general trend is that when governments start regulating their organic sector, a number of new actors step in to offer organic certification services to what they believe is a burgeoning market. In most cases, however, after an initial growth, numbers rapidly go down as a result of failure by certification bodies to fulfil government requirements and a lack of profit.

Worldwide, organic certification costs the sector approximately 500 million US dollars annually, which is at least 1% of the retail value of the products. The indirect costs – activities that operators do just to fulfil certification requirements, such as filling in forms, participating in the inspection, preparing inspections and responding to requests from the certification body – are probably in the same order of magnitude. Historically, most organic certification bodies were associations, foundations or other not-for-profit organisations. Today, most are for profit. But even if the cost of the service is high from the perspective of the clients, it is doubtful that there is a lot of profit generated by selling certification services.

The important question is, perhaps, not how many dollars or euros certification costs nor is it whether certification bodies make too much or too little profit. The important question is whether certification adds sufficient value to the production to motivate the investments. And this is different for different producers. For a small producer with diversified production and direct marketing, the direct and indirect costs, as well as the administrative pressure are often too high. Standards and certification, by their very nature, almost always discriminate against small and diverse production. This is especially painful for the organic sector, as diversity is a cornerstone of organic production. The solution to this problem is two-fold. First, as much effort as possible should be spent within the system to accommodate the needs of small producers. Second, small producers should be allowed to identify themselves as organic in the marketplace with other tools specifically designed for them.

The number of private standards is declining, and only a quarter of certification bodies today have their own standards, the others provide a certification service to a standard set by someone else, normally the government of their country. This is likely to result in diminishing returns from private standards. Those that still invest in them are forced to make them differ substantially from the regulations so as to motivate consumers to select them over following just the regulations. On the one hand this creates some dynamism in the marketplace. On the other hand it is resource-consuming and poses huge challenges for trade. It also makes keeping a consistent message for consumer communication and fostering market recognition for organic products difficult.

The question of added value also applies to accreditation. IFOAM Accreditation has – after almost twenty years – still only got 31 accredited schemes. ISO 65 accreditation is much more widespread, but one should not believe that it gives greater added value. ISO 65 is widespread because some regulations, most notably the EU Regulation, require it. The added value, both in the market place and for the integrity of organic production, of ISO 65 accreditation is often, rightfully, questioned. Now that the Regulation is under review, one would hope that the EU will look into this once more. ■

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> The important question is whether certification adds sufficient value to the production to motivate the investments.

news shorts…

The EU list is old

The European Commission had not released its list of approvals for 2012 at the time of writing this report. This means the most up-to-date official list available, the list of EU based control bodies (Version 01/04/2011 approved on 31/12/2010), was published in late 2010. It is notable that the Commission has never been this late with issuing an updated list.

Other lists available are:

- The list of control bodies operating out of third countries (Version 07.05.2012)
- The list of control bodies operating under the system of import authorisations (Version 10.11.2011). ■

France

There was little change in the number of certification bodies in France over the last five years, but recently three new certification bodies have started up. These are Alpes-Contrôles, Certis and Qualisud. ■

Ascisco

Three CBs have stopped providing certification services in the United Kingdom in the last year. One of these is Ascisco Ltd, a subsidiary of the Soil Association that provided certification to the EU market. Soil Association has taken over all certification previously conducted by Ascisco. ■

Eighty-six countries have a domestic certification body, but this does not mean that producers in the countries without a certification body do not have access to certification. Many of the listed certification bodies also operate outside their home country and there are very few countries in the world that do not have a certification body operating within its borders (see box below). All in all, there are certification bodies operating in 165 countries.

It should be noted that twelve certification bodies claim to operate worldwide and should, therefore, be able to cover all countries even if they do not at the moment. Generally, certification bodies operating internationally are based in a developed country and offer their certification services in developing countries, very few operate in several developed countries. A handful of certification bodies work on several or all the continents.

Thirty certification bodies operate in more than ten countries (see table). Twenty-three larger certification bodies have a combined total of ninety-three branch offices with local approvals worldwide. The nine CBs that work in the highest number of countries come from Europe, while the tenth one is OCIA from the US. Of the certification bodies working in most countries there are fifteen from Europe; four each from North America, Latin America and Asia; two from the Pacific; and one from Africa.

There are 458 certification bodies working in only one country and thirty-eight in two countries.

Most of Africa and large parts of Asia still lack local service providers. For example, there are only nineteen certification bodies in Africa, and these operate in Cameroon, Egypt, Kenya, Senegal, South Africa, Tanzania, Tunisia, Uganda and Zambia. Asia has 222 certification bodies, but most of these are based in South Korea, Japan, China and India. The Caribbean has very few certification bodies. The only local certification body is the Jamaica Organic Agriculture Movement Ltd., but the other CBs with offices in the Caribbean are BCS (Cuba and Dominican Republic) and IMO (Dominican Republic). The Pacific has certification bodies only in Australia and New Zealand, and these operate in most of the countries in the

Countries/areas that do not have certification services

Asia: Afghanistan, Bahrain, Brunei, Burma, North Korea, Kuwait, Mauritius, Mongolia, Oman, Qatar, Tajikistan, Turkmenistan, Yemen

Latin America and the Caribbean: Antigua and Barbuda, Aruba, Barbados, Dominica, Falkland Islands (Islas Malvinas), Grenada, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago

The Pacific: Kiribati, Micronesia, Nauru, Norfolk Island, Palau, Tonga, Tuvalu

Africa: Algeria, Cape Verde, Djibouti, Eritrea, Libya

Europe: Andorra, Liechtenstein, Monaco

The countries above were not listed as a country of operation by the certification bodies that replied to our questionnaire. However, readers should note that there might be certified organic land in the country anyway. Please tell us if you have additional information.

region.

Looking at trends over the past decade, the number of certification bodies has risen sharply in Asia and Europe, increased in Latin America and has been relatively stable in Africa, the Pacific region and in the United States. In Brazil, the number of certification bodies decreased to less than half when the government published a list of approved bodies. In some countries, notably China, Japan and South Korea, the introduction of a regulation led to a growth in the number of certification bodies between 2006 and 2010. In 2012, a rise of certification bodies is noted in the Asian countries South Korea, India, Thailand and Turkey while the number in China decreased by four. Japan reports a steady number of around sixty certifiers since 2008. The number has also stabilised in Europe with there being around 190 certification bodies in the region since 2010.

More specifically, the United Kingdom and Spain experienced a decrease, while France had an increase of three more certification bodies. Azerbaijan got their first locally based certification body, and Bosnia and Herzegovina, Germany and Sweden each had one more certification body. The number in Oceania has remained stable over the period, with the only change taking place in Australia which now has one less certification body than it did ten years ago. In North America, the number dropped by two, both from the US.

Number of operators and farmers

The worldwide number of certified farms is likely to be more than three million. Certification bodies were asked for information about the number of operators they certify; 234 responded, representing a total of 208,629 operators. However, only 204

Certification bodies and the number of countries they operate in

Certification body	Number of countries	Main regulatory approvals
Ecocert (France)	56	Canada; EU; ISO 65; Japan; USA
BCS (Germany)	54	Canada; EU; ISO 65; Japan; USA
Institute for Marketecology (Switzerland)	52	Canada; EU; ISO 65; Japan; USA
Naturland (Germany)	52	IFOAM; ISO 65; USA (cooperate with certification bodies which have EU approval)
Soil Association (UK)	40	Canada; EU; ISO 65; USA
CERES (Germany)	36	Canada; EU; ISO 65; Japan; USA
Control Union Certifications (Netherlands)	29	Canada; EU; ISO 65; Japan; USA
Demeter-International e.V (Germany)	25	USA (cooperate with certification bodies which have EU approval)
Lacon GmbH (Germany)	21	Canada; EU; ISO 65; USA
OCIA International (USA)	20	Canada; EU; ISO 65; Japan; USA
ETKO (Turkey)	18	Canada; EU; ISO 65; USA
Bio.Inspecta (Switzerland)	17	Canada; EU; ISO 65; USA
ICEA (Italy)	14	Canada; EU; IFOAM; ISO 65; Japan; USA
Suolo e Salute (Italy)	14	Canada; EU; ISO 65; USA
OneCert Asia (India)	13	EU; USA
Doalnara (South Korea)	13	Canada; EU; IFOAM; ISO 65
ACO (Australia)	12	Canada; EU; IFOAM; ISO 65; Japan; USA
Austria Bio Garantie (Austria)	12	Canada; EU; ISO 65; USA
Bioagricert (Italy)	12	Canada; EU; IFOAM; ISO 65; Japan; USA
IMO Control Latinoamérica (Bolivia)	12	EU; ISO 65
IBD (Brazil)	11	Canada; EU; IFOAM; ISO 65; USA
ABCERT (Germany)	11	Canada; EU; ISO 65; USA
ACT (Thailand)	11	Canada; EU; IFOAM; ISO 65
QAI (USA)	11	Canada; EU; ISO 65; Japan; USA
QCS (USA)	11	Canada; EU; ISO 65; USA
NASAA (Australia)	10	Canada; EU; IFOAM; ISO 65; Japan; USA
Mayacert (Guatemala)	10	Canada; EU; ISO 65; USA
Bio Latina (Peru)	10	Canada; EU; ISO 65; USA
Afrisco (South Africa)	10	IFOAM; ISO 65
OneCert (USA)	10	Canada; EU; ISO 65; Japan; USA

news shorts…

Canadian organic groups join forces

The Canadian Organic Growers (COG) and Canada Organic Trade Association (COTA) decided in January to centralise their efforts to better represent Canada's organic sector in Ottawa.

Active since 1985, COTA is the membership-based trade association for the organic sector in Canada. It represents growers, shippers, processors, certifiers, farmers' associations, distributors, importers, exporters, consultants, retailers and others. In addition, COTA maintains an affiliation with the Organic Trade Association in the USA.

Active since 1975, Canadian Organic Growers is a national charitable organisation with nine regional chapters, four affiliated organisations, and members in all regions of Canada, including farmers, processors, retailers, educators, policy-makers, and consumers.

COG and COTA already have a strong relationship. They have worked together on numerous projects, such as on educational workshops to train organic operators on the new organic standards, and in other areas of importance to the organic sector. The two organisations will maintain distinct boards of directors and organisational roles, but will maximise efficiency through collaboration, shared resources and common headquarters in Ottawa. ■

More information about COG and COTA is available at www.cog.ca and www.ota-canada.ca .

certification bodies gave an answer regarding the number of farmers. These certified, in total, 1,199,504 farmers, with BCS (Germany) topping the list, claiming to certify more than 300,000 farmers. IMO's head office (Switzerland) reported more than 120,000 and IMO Control Latinoamérica Ltda in Bolivia reported 36,000. Many of the farmers are certified in group certification for smallholders.

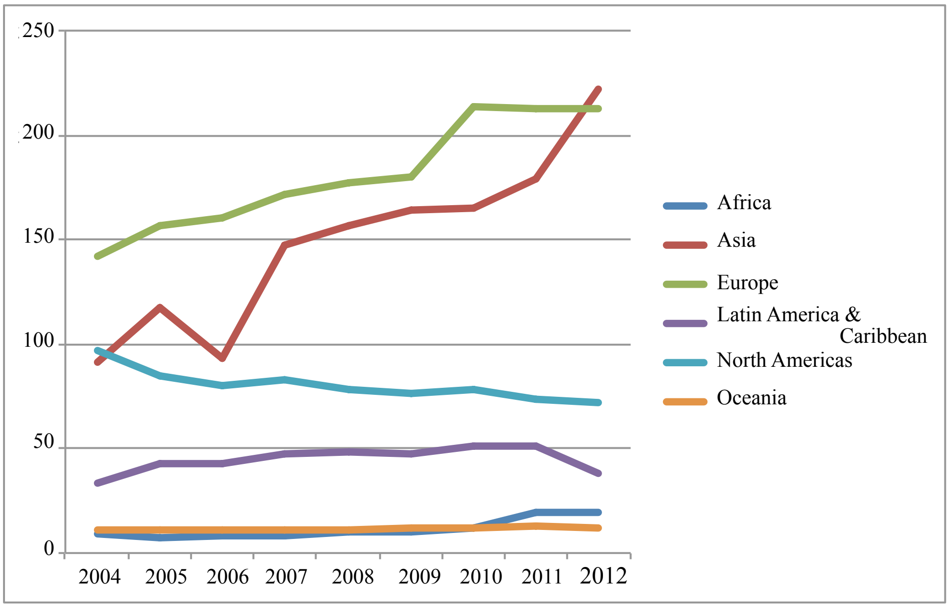
India has the highest number of organic farmers in the world, with an estimated figure of more than 800,000 farmers. Naturland (Germany) reports 50,000 farmers, and Certimex (Mexico) nearly 30,000 farmers. It should be noted that a farm can be certified twice. For example, Naturland does not have its own inspectors and uses other organisations, such as IMO, to inspect their farmers to Naturland standards. IMO may then certify the same farmer for e.g. EU approval or NOP, and, therefore, the same farmer will be included in Naturland and IMO's figures and counts as two in the statistics. Information is lacking from many important countries and more than half of the certification bodies.

Turnover

Most certification bodies are still not transparent about their turnover. Only 83 organisations responded to the question. Of these, many reported a turnover in the range of 100,000 to 500,000 euros. The certification bodies reporting a turnover of 2 million euros or more are Ecocert (France), Soil Association Certification Ltd (United Kingdom), Organic Trust (Ireland), CCPB ltd (Italy), Suolo e Salute s.r.l. (Italy), CCOF Certification Services (USA), DIO Certification & Inspection Organization of Organic Products (Greece), Stichting Skal (The Netherlands), Debio (Norway), Instituto per la Certificazione Etica e Ambientale (ICEA) (Italy), bio.inspecta AG (Switzerland), Qualité-France SA, Ecocert SA (International Department) and BIO HELLAS SA Inspection Institute of Organic Products (Greece).

When comparing reported turnover with the number of operators, one is forced to conclude that many of the CBs generate income from other activities in addition to organic certification. For example, the figures of some

Number of certification bodies per region



CBs imply that operators are paying around 3,000 euros per year for their organic certification, which is highly unlikely.

The global turnover in organic certification is well above 300 million euros, indeed, the actual figure could be double that amount, but with many of the CBs not reporting their turnover it is impossible to tell.

Starting date

Of the 343 CBs that responded to the question concerning the starting date of their organisation, only 14 started before 1985; more than half started in the decade between 1995 and 2004.

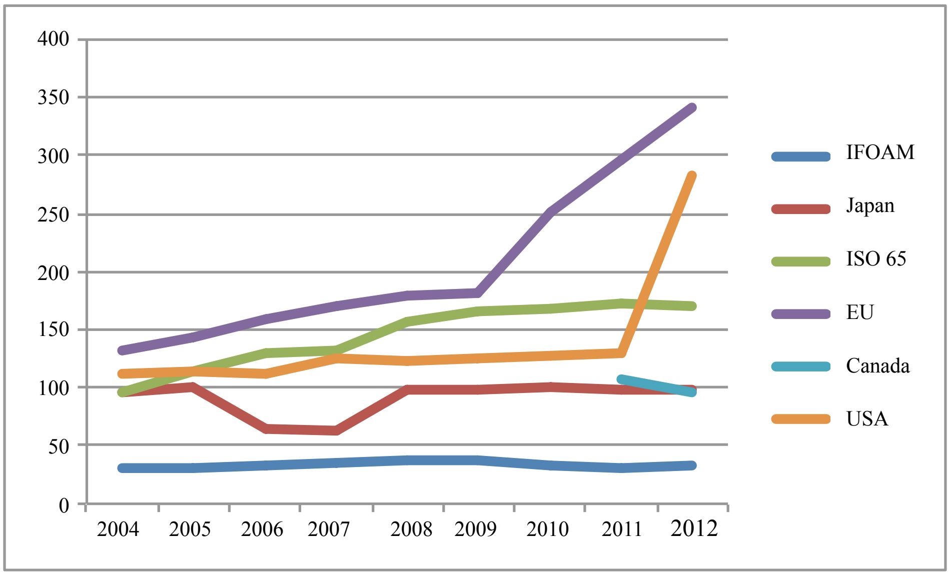
Start of operation of organic certifiers

2005-2012: 22%
1995-2004: 51%
1985-1994: 23%
Before 1985: 4%

Approvals

Worldwide, there are six significant approval schemes,: IFOAM and ISO65, and the regulations from EU, Japan, USA and Canada. Only eleven certification bodies – four Italian and two each from Argentina, Australia and New Zealand, and one from Japan – reported being accredited by all six schemes. Notably, the number of approved certification bodies to the IFOAM, Japan and ISO 65 schemes are stable; IFOAM has 33, Japan has 99 and ISO65 has 170 certification bodies accredited.

Type of approval



The US represented the biggest increase in approval status with an increase from 129 in 2011 to 283 approved bodies in 2012. The majority of the approvals to the US are through the EU-USDA trade agreement.

Of the 283 approved bodies, only 51 are based in the US.

In Canada, the number of approvals has decreased to 96 in 2012 from 107 in 2011. The EU has an increase of 45 approvals, all from the US. It should be noted that the European Commission had not released the list of approvals for 2012 at the time of writing this report and that the last official list was published in late 2010.

In 2012 IFOAM gained three accredited certification bodies; one in China, one in India and one in Palestine. These are Biocert India Pvt Ltd, Company for Organic Agriculture in Palestine and Hong Kong Organic Resource Centre Certification Ltd.

The number of certification bodies that claim to have their own standard decreased from 127 in 2011 to 121 in 2012. ■

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More information about The Organic Certification Directory *can be found on www.organicstandard.com/directory*

Finally, we at The Organic Standard would like to send out a special thanks to all the certification bodies that have provided us with the information.

Fewer standards

The updating of The Organic Certification Directory highlighted interesting trends associated with standards and certification bodies. For example, for years there was a steady rise in the number of standards, now there is a decline

To update *The Organic Certification Directory* a questionnaire was sent out to all certification bodies (CB) worldwide. Of the 576 that responded, only 267 CBs answered the question of whether they have their own standards or not. Within the term 'own standards' TOS included both private standards with a wide scope (such as the standards used by the Soil Association and KRAV) and standards made by public or private organisations to cover specific scopes. The term also includes subject areas outside the food/feed sector, such as cosmetics.

Just 267 responses to this question might seem a low response rate, but a look at the figures still reveals several interesting patterns. For instance, of the 267 certification bodies that responded, 121 of them stated that they have an 'own standard', while 146 stated they do not. The number of CBs claiming to have a private standard has declined from 2011 when 127 certification bodies answered that they had their own standards.

The landscape of standards has changed gradually over the years with more legislations being introduced every year. There are around a hundred countries that either have finalised or are working on a legislation for organic production. This has, of course, changed the role and space for private standards for organic production, so it is not a surprise that the number of own standards are going down for agricultural production while the number of standards for areas like social issues, catering and cosmetics is increasing.

Looking at specific regions, it is apparent that few certification bodies in North America, Asia and the EU have own standards. In Asia, where the respondent rate was low probably due to language problems, the Certification Directory used native language speakers to gather names and central facts about the CBs, but there has not been enough time to dig into the details of the questionnaire. The highest proportion of CBs with own standards compared with the total number of CBs is in Africa, Latin America and Oceania. The two countries with the highest number of certification bodies claiming their own standard are Germany and USA, with nine each, followed by Italy with seven and Spain with six.

An investigation into the types of certification bodies and the kinds of standards reveals several, sometimes overlapping, categories. Examples of these categories include:

- Certification bodies that work in an area where there are few organic regulations.
- Standards owners that have a strong logo and marker position, such as organisations like Naturland, Bioland, Demeter, Soil Association, KRAV and BioAustria.
- IFOAM accredited certification bodies that until now have been required to have an own standard that includes the same topic and levels as the IFOAM standard in order to fulfil the IFOAM Norms.
- Certification bodies that are approved as working in equivalence with the EU Regulation certifying outside the EU where it is required to certify to a private standard (several of the approved CBs are using the same standard).
- Standards covering other areas that are not covered in current legislation of a country or a region, especially mentioned are aquaculture, cosmetics, social issues, honey processing and shops. ■

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Number of certification bodies per region

	Total no. of CBs	No. of CBs that responded	No. of CBs with own std.	No. of CBs without std.	% with own std.
Africa	19	10	7	3	37%
Asia	222	49	24	25	11%
Europe	213	122	53	69	25%
Latin America & Caribbean	38	29	16	13	42%
North America	72	47	13	34	18%
Oceania	12	10	8	2	67%
Total	**576**	**267**	**121**	**146**	

The Organic Standard Annual Review

Organic news and events published in The Organic Standard *throughout 2012*

In the organic certification world, the year 2012 was marked by the achievement of finalising an equivalence agreement between the USA and the EU. The agreement was announced by both parties as a partnership, rather than simply a mutual recognition of regulations. Other recognition agreements were also achieved, and still others were initiated or ongoing with discussions throughout 2012. At the same time, more countries are in the process of creating laws to define and protect organic production.

On the other hand, new issues of concern developed for the organic sector, the sector regulators and the label owners. These included issues such as the sustainability of a system, and how organic values should be communicated to consumers. Several questions arose – What is the future of the organic sector? Where is it headed? Will the organic label lose the market competition against other eco-labels? Will certification be substituted by other means to confirm the integrity of a product?

The role that organic production (and its standards and certification) plays, or should play, in future scenarios is another question. What are the new challenges? What must the organic sector do to keep to its roots while also evolving and offering solutions for the 21st century?

TOS widely covered these matters throughout 2012. One particular highlight in 2012 was when TOS invited special contributions from differing experts to describe what they believe should be done and what they expect for the future of the organic sector.

Sustainable aquaculture was one specific field that initiated several studies and discussions during the year. Sustainability has definitely been the word of the year. For example, IFOAM, which is coordinating the Sustainable Organic Agriculture Action Network (SOAAN), aimed to define sustainability based on the 'Principles of Organic Agriculture'.

As usual, TOS also covered news on GMOs that concerned organic production. There were initiatives in several different US states aimed at regulating the labelling of GM foods. There were also initiatives to label, control or ban GMOs all over the world. And, of course, the fight against fraud – such as the activities of the Anti Fraud Initiative (AFI) – continued throughout 2012.

EU and USA

The USA and EU Governments signed their partnership in BioFach Nuremberg 2012. With the signing both parties agreed to recognise the organic programmes of the other party (with just a few exceptions). The agreement came into force on 1 June 2012 and made it possible for organic products certified in the EU or the USA to be sold in the other country/region without any further inspection or certification. The agreement excludes products not produced or processed within the USA or the EU. By the end of the year it was clear that this was creating difficulties for traders from other countries since the range of NOP certified products from the EU (or EU certified products from the USA) was limited. In addition, more time is needed to sort out practical issues associated with the few cases excluded from the agreement, such as products or ingredients coming from animals treated with antibiotics, which are prohibited by NOP.

EU Regulation

Wine rules: After years of discussion the EU wine rules were approved and published as Regulation EU 203/2012. The new Regulation, which came into force in August 2012, permits the use of the term 'organic wine' on labels, replacing the term 'wine made from organic grapes', and the use of the EU-leaf logo on the wine labels.

EU logo: In July the transition period to use labels designed according to the previous rules and using the former logo came to an end.

Animal feed: Regulation (EU) 505/2012 published in June, amended certain provisions regarding animal feed.

Equivalence list extended: In June a number of certification bodies operat-

> What must the organic sector do to keep to its roots while also evolving and offering solutions for the 21st century?

news shorts…

Swiss parliament proposal 'No palm oil on our plates'

The chambers of the Swiss Parliament are presently discussing a proposal made by the Swiss canton Freiburg asking for 'No palm oil on our plates'. The proposal is demanding a ban on palm oil imports and an obligatory food declaration of palm oil. While an import ban has almost no chance in the political process, the demand for more declaration transparency is already partially fulfilled as part of existing declaration laws or discussions as part of the reform process of food legislation in Switzerland and the EU. Hopefully, the key question on the sustainability of palm oil production will not be ignored at the political level and even more on the level of international basic trading standards. ■

www.parlament.ch/d/suche/seiten/geschaefte.aspx?gesch_id=20120313

Ukrainian organic standard

The standard is no longer offered by the Ukrainian certification body, Organic Standard Ltd. The standard was developed more than six years ago, based on the IFOAM, EU and Bio Suisse standards. However, it was not very popular among the producers (< 5 producers in 2011), says Sergiy Galashevskyy from the certification body Organic Standard Ltd. ■

ing in third countries were recognised as working in equivalence with the EU Regulation and added to the original list of 30 CBs approved in December 2011. There are now 53 certification bodies listed. In August the list was amended again by the Regulation (EU) 751/2012.

EU Regulation under review: The new EU Regulation underwent several reviews, many of them from different perspectives. Those reported in TOS in 2012 were conducted by:

- *The Commission to the European Parliament and the Council on the application of Council Regulation (EC) 834/2007.* This report responds to the requirement of Article 41 of the Regulation to address the questions of mass catering, GMOs and internal market.
- *The European Court of Auditors.* The evaluation of the control system of organic production and imports to the EU was published in July. The report identified several weaknesses in the system and its performance, and presented a range of recommendations.
- *The European Commission (COM).* The purpose of this review (which is still being conducted) is to identify the points that must be improved in order to ensure the Regulation's future credibility. The process of the review includes a public consultation open to EU stakeholders and the general public.
- *Independent evaluation.* This evaluation, that is still in progress, is being conducted by an external organisation contracted by the COM.

US National Organic Program (NOP)

Improve and define inspectors' qualifications: NOP recognised the lack of clear regulatory guidance concerning inspector qualifications and training, and is working with stakeholders, such as NOSB and the International Organic Inspectors Association (IOIA), to develop it.

Chilean nitrate: After years of discussion the NOP decided that, provided the product is of natural or non-synthetic origin, sodium nitrate can be used without specific restriction. However, the situation is temporary, and once the NOP publishes new rules on the subject, natural sodium nitrate will be prohibited for use in organic production.

Communication, information: NOP is often seen as one of the organic programmes that is more open to informing and listening to organic stakeholders and the general public. Some of NOP's initiatives in this regard in 2012 were:

- A list of all operators – both domestic and overseas – certified to NOP is made available on http://apps.ams.usda.gov/nop
- The newsletters, *Organic Insider* and *Organic Integrity Quarterly* are sent by email free to anyone who subscribes.
- The launch of 'USDA Organic Resources Guide 2012_Your Guide to Organic and Organic-Related USDA Programs'. This document compiles the information and requirements that relate to organic production.
- The development of new materials for the Organic Literacy Initiative. This is conducted in partnership with the National Center for Appropriate Technology (NCAT).
- The publication of all NOP suspended/revoked organic operations (on http://bit.ly/suspendedrevoked) and fraudulent organic certificates (on http://bit.ly/fraud-certs).

- A specific email address is provided for complaints on suspected violations to the regulations (NOPCompliance@ams.usda.gov)

Country news

USA
The planned merger of the two certification bodies, CCOF and Oregon Tilth, did not take place. Everything was ready and the new body was going to be called CCOF Tilth, but in the end the Oregon Tilth membership did not approve the merger with the necessary majority of votes for passage.

Canada
The Canadian Organic Aquaculture Standard was adopted in May. The standard is not under the scope of the Canadian official regulation for organic food, which means that organic aquaculture products are excluded from the trade agreements with the EU and the USA and they cannot display the Canadian organic logo.

Canada and Switzerland
In December Canada and Switzerland officially recognised each other's organic programmes as equivalent.

EU
CERTCOST: This EU project produced recommendations on how to improve the organic certification system and on how to increase the effectiveness and efficiency of organic certification. Available at www.certcost.org/

IRM-ORGANIC: The EU project 'Training on Improved Risk Management Tools for Organic Inspectors (IRM-ORGANIC)' run by Quavera, started in October.

EOCC and IFOAM EU guidelines to interpret analysis results: IFOAM EU Group published the 'Guideline for Pesticide Residue Contamination for International Trade in Organic', and the EOCC published their 'Pesticide Residues Guidelines'. Both guidelines were developed in parallel, and they have many points in common although they focus on different aspects. By the end of the year IFOAM EU and EOCC were working together to harmonise and coordinate their proposals.

Spain
The autonomous region of Catalonia in Spain approved a new set of technical rules related to organic farming (Quadern de Normes Tècniques or QNT) that include standards for organic rabbit and snail production and for retailers and bulk sales.

Germany
A new national regulation 'Regulation for the approval of control bodies based on the organic agriculture law' came into force in May 2012. It defines in detail the approval criteria for the certification bodies. It also specifies and develops the EU Regulation requirements on control.

Russia
Russia started work on its own organic regulation. Its entry in 2012 into the World Trade Organization (WTO) encouraged Russia to consider becoming a significant supplier of organic products within the scope of the WTO.

Brazil
In August 2012, the President of Brazil approved the National Policy for Agroecology and Organic Production (Decree No. 7.794 of 2012). The aim of the Decree is to integrate, articulate and prepare policies, programmes and tasks that support organic production at the national, regional and local levels.

Chile
Chile has given shape and life to a National Certification System of Organic Agricultural Products where both a third party certification system and an alternative certification system coexit.

Africa
Organic agriculture in Africa is growing rapidly. Most of the certified organic production is sold for exports, but there are good organic markets in some countries and emerging markets in others. This year, the second African Organic Conference held in Zambia was a milestone towards bringing organic agriculture into the mainstream in Africa. People attending included representatives of the African Union, FAO, IFOAM, UNCTAD and the EU.

South Korea
South Korea introduced changes to its regulation: the two standards that made the Korean Regulation, the EFAPA (crops) and the FIPA (processing) standards will be combined into just one standard. It is likely that a regulation about equivalence is included. This equivalence regulation is expected to be implemented on 1 January 2014.

China
The new version of the China National Organic Product Standard

Organic agriculture in Africa is growing rapidly.

and the Rules on Organic Certification came into effect on 1 March 2012. The renewed Standard imposed new strict measures, such as the compulsory testing of all crops, adding to the already very demanding Chinese organic regulation. So far organic products imported into China must be certified to the Chinese standards; however there might be some opportunity for bilateral equivalence negotiations, and in July China and the EU announced that they had started negotiations for mutual recognition.

India
The National Organic Textile Standard (NOTS) was set up by the Indian organic authority APEDA (Agricultural and Processed Food Products Export Development Authority) and India claims to be the only country in the world to have introduced organic textile standards at the national level.

Buthan
The Buthan president announced Buthan's aim to be the first country where all domestic food production is organic.

Other news

IFOAM
The new IFOAM standard for Organic Production and Processing Version 1.0 was approved by the IFOAM Membership. The Standard forms part of the new version of the IFOAM Norms, released in August 2012, which in addition to the IFOAM Standards, also includes the IFOAM Standards Requirements (COROS) and the renamed IFOAM Accreditation Requirements.

GOMA
In its last year GOMA produced or contributed to many important initiatives to facilitate communication between governments and standard setters, and the harmonisation between different standards. GOMA webpage is still active and can be consulted. Some of its 2012 achievements were:

- The Asian Regional Organic Standard (AROS) was approved on 12 February by GOMA's Asia Working Group, which consisted of government officials and other representatives from Bhutan, Laos, Thailand, Vietnam, Malaysia, India, Indonesia, China, the Republic of Korea, Japan, Hong Kong (China), the Philippines, Cambodia, Nepal and Sri Lanka.
- Organised the conference 'Let Good Products Flow', held in Nuremberg, Germany on 13-14 February. The conference had a remarkable line up of prominent speakers. Most speakers said that differences in organic standards are small and that equivalence agreements lead to more harmonisation of standards.

New technologies/initiatives to improve control in 2012

- AuthenticFood is a CORE Organic II project to fight against fraud. The project is developing methods of detecting differences in the chemical composition of organic and conventionally produced foods.
- There was more news on the use of innovative methods to determine the organic status of a product, such as an analysis using isotopes, used by Skal, a Dutch certification body.
- Quick Response (QR) codes started to become popular. A mobile smartphone can read the code and link to a website. In this way the consumer can be provided with a lot of information. Certification bodies such as QAI announced that they have now added QR codes to their certified product certificates.

Other news in brief
Organic kosher and halal: The combination of organic certification and a religious certification became possible in some countries. Even a standard for organic and natural halal cosmetics is in development by Standards Malaysia.

PGS schemes

- The PGS option continued to be consolidated and is being officially recognised in more countries, such as Bolivia and Chile.
- *Strong and consolidated PGS movement in Vietnam*: There is a PGS Coordination Group that has worked with its own standards since 2004; in 2012 this group had 26 farmers groups registered.
- PGS was discussed at the United Nations Conference on sustainable development Rio+ 20, in Rio de Janeiro, Brazil, in June.

ISO/IEC 17065: The ISO/IEC 17065, 'Conformity Assessment Requirements for bodies certifying products, processes and services' was launched in September. The revised guide will replace the current ISO/IEC 65. All certification bodies will have three years to meet the requirements contained in these new standards from the date of publication. ■

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TOS readers interested in finding any article published in 2012, on the issues mentioned in this summary or on any other issue covered by TOS can write to assignment@organicstandard.com and we will be happy to locate it.

India claims to be the only country in the world to have introduced organic textile standards at the national level.

news shorts…

UAE regulation in preparation

The United Arab Emirates (UAE) has initiated the process to regulate organic production and certification. 'It's in the process of happening now and the ministry is very active. The regulations are currently getting written up, the Government then has to turn them into a law', said André Leu, IFOAM president.

Mr Leu was in Dubai last December for the Meveg Seminar 2012, part of the Middle East Natural and Organic Product Expo 2012. 'It's very important for our region to start an organic movement', said Dr Reza Ardakani, an expert in organic agriculture and certification processes. 'Organic is growing very rapidly around the world and we must accelerate organic production in our region.' ■

More information: www.thenational.ae/news/uae-news/uae-moves-to-regulate-organic-food-production

More CBs in Korea

The number of certification bodies in Korea has increased by more than 100% over the past two years. There are a total of 76 certifiers in Korea at the moment, but there are 86 on the official list of accredited bodies because some are listed twice. The numbers do not include NAQS, which is the government branch responsible for certification and accreditation, because they announced they would be suspending all certification activities by 2013. ■

Feedback from the experts

An article written by Gunnar Rundgren, published in TOS 132, April 2012 and titled 'The next ten years' inspired TOS to invite several experts to write on how they believe organic certification and standards will develop. They were also asked what they think the main challenges for the organic sector are, and what they expect for its future within the wider context of worldwide development.

In an attempt to show the diversity but also the similar concerns among these experts from very different backgrounds, this summary highlights one thought expressed by each of them.

Isidre Martínez Badia
Head of the organic farming unit in the Catalonian Government, Spain:
'The organic sector will do better by abandoning their urge to create different private standards and instead work together to press politicians and legislators to transform the existing rules. This way a two-tier certification system could develop. The first level certifying production aspects and the second one recognising other additional values.'

Patrick Mallet
ISEAL Credibility Director:
'Ultimately it is less important what form standards systems take so long as they effectively address the critical social and environmental challenges that we are collectively facing.'

Joelle Katto-Andrighetto
IFOAM Program Manager:
'Independence, as an indispensable and sufficient principle of assurance, seems to have been largely overvalued in the last decade. Impartiality is the true principle that assurance systems should strive to attain, and independence is one possible approach towards impartiality, with its own challenges.'

Ulrich Hoffmann
Senior Trade Policy Adviser Office of the UNCTAD:
'Although government regulation may still be concerned with assuring integrity of organic systems, organic agriculture needs to be recognised as a dependable, innovative system that plays a pioneering role in the much-required fundamental transformation of global agriculture.'

Jean- François Hulot
former Head of the Organic Farming Unit, EU Commission:
'For the long-term future and from a very personal viewpoint which is commitment only to myself, I think that attempting to make the standards converge would be a good thing. About the EU, I am confident that organic farming will continue to develop in a new context of growing concerns about sustainability of our agriculture.'

Laura Montenegro
Technical Director / President of ARGENCERT S.A. President of CERTIBIONET:
'The most important challenge of all is to focus our values and to communicate that these values, along with a paradigm shift to organic as a lifestyle, are a way of life. Networking is the best way to do this and to prepare to change and to save our planet. It is essential we communicate the idealism of sustainability to the global community, especially the youth of the world'.

news shorts…

Indiana Certified Organic changes its name

The American certification body, Indiana Certified Organic (ICO), one of the first to become accredited by the USDA National Organic Program (NOP), has changed its name to Ecocert ICO, LLC.

ICO, based in the state of Indiana, became a subsidiary of the Ecocert Group in 2011, and now also has an office in California as well as satellite locations in Oregon, Wisconsin and Florida.

As part of the Ecocert Group international network, Ecocert ICO can now provide inspection services for various international organic regulations in addition to the NOP, natural and organic cosmetics and ecoproducts, organic textiles, fair trade, ecological green spaces and carbon services. Ecocert currently operates 23 offices and subsidiaries, offering its services in over 80 countries. ■

For more information: www.ecocertico.com (Vincent Morel, General Manager; Jessica Ervin, Administrative Manager)

Bill Wolf
President of Wolf, DiMatteo + Associates, consultant in the USA:
'We need to reconnect soil quality with crop and animal health – connect the quality of what we're producing to the certification process. We spend too much time proving what we don't do rather than showing what we should be doing. Consumers are persuaded to buy organic because they can taste the difference in quality, and we need to link back quality to the certification process.'

Ong Kung Wai
Grolink partner, Chairperson of Organic Alliance Malaysia and Coordinator of Certification Alliance:
'The willingness of organic stakeholders to accept differences will define the success story of the organic movement […] unless there is more willingness to accommodate differences within the sector, we may remain a fragmented sector divided by a common concept. Ten years on it may still be a promising sector that has not grown beyond its present niche market position – simply because it did not allow itself to be a mainstream solution for sustainable agriculture and development.'

Matthew Holmes
Executive Director of the Canadian trade association COTA and an IFOAM Board member:
'We are working on promoting equivalency. Where there is already bilateral trade or a strong supplier relationship, equivalence can offer some very good things. This helps the small and medium growers and enterprises since they don't have to meet multiple overlapping standards and requirements […] Keep the core of organic principles, with an eye towards always improving the standards.'

Miles McEvoy
Deputy Administrator of USDA Agricultural Marketing Service, in charge of the NOP:
'Harmonisation and reciprocity will continue to proliferate […]. What is important right now is that more effort is made to assess the value of existing standards for sustainability goals rather than creating additional layers of requirements. We need to figure out ways to make the certification process more affordable and accessible so it's not burdensome to the smallscale grower.'

Enid Wonnacott and Nicole Dehne
VOF, a USA certification body:
'We must really increase and improve farmer involvement in the national process. Involve them in giving public comment and into taking an active role […] Another issue is GMOs – what are we doing to fight Monsanto in a more public way? […] We need to return to soil management – we really need to give farmers more technical help on quality soil management, soil improvement.'

Michel Saumur
Director of the Organic Office of the Canadian Food Inspection Agency (CFIA):
'Organic standards can be flexible and can be modified, but at the same time there are very strong principles. There is pressure sometimes to dilute the standards. You have to maintain a fine balance between strong principles and harmonisation.'

There is pressure sometimes to dilute the standards.

The making of *The Organic Certification Directory*

The Organic Certification Directory is updated every year. The work starts in September and finishes in February when the Directory is published.

Numerous lists of certification bodies are provided, sometimes with relevant updates and other times with clear misinformation. One example of a useful list is the one supplied by USDA/NOP that nowadays is quite reliable. In contrast is the Canadian list, which has incorporated many of the previous NOP approved CBs and is not updated as often as the USDA list.

Some of the lists are supplied in a language foreign to the compilers, which presented some difficulties. For example, the Japanese list – which is an example of a well managed list – was delivered to TOS in Japanese. Translation, mostly by using a translation programme, was, of course, a challenge. However, what made the situation harder is that the list includes the names of the foreign certifiers that have already been translated from the original language into Japanese by the Japanese Ministry of Agriculture. This is not always easy and there is often some confusion. For example, when using google translation the Mexican certifier, Certimex, was translated into 'Cerutti Female Mosquitoes'.

After all the lists have been checked, we send out a questionnaire to every certification body worldwide asking for more information. ■

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IFOAM is 40 years old

Last November IFOAM celebrated its 40th anniversary with a reception held in the IFOAM Head Office in Bonn, Germany. It all began at a little meeting held in Versailles, France in November 1972 at the invitation of Roland Chevriot from Nature et Progrès. At the 40th anniversay celebration Denise Godinho, responsible for public relations, presented a journey into the past with a large number of short contributions and pictures compiled especially for the celebration and titled 'Celebrating 40 Years – Organic without Boundaries'.

One of the sections of this brochure is called 'Did you know?' and offers some curious bits of information that illustrate the evolution of the federation from its early days. Some interesting facts are:

- At the beginning the name 'IFOAM' was just provisional, it was never meant to stick.
- The first funding for IFOAM came from Rodale Press.
- IFOAM initially shared its offices with Nature et Progrès, and later on with FiBL.
- IFOAM's first scientific conference was held in 1977.
- The offices in France where the first IFOAM statutes were registered was flooded a few years after IFOAM was founded, its presumed the original registration papers are lost. ■

Source: Denise Godinho, IFOAM

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