

# "EU Policy in Organics: how to boost two-way trade in organic products? Organics"

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# 1. The organic market in the EU

# EUROPE: ORGANIC FARMLAND 2017



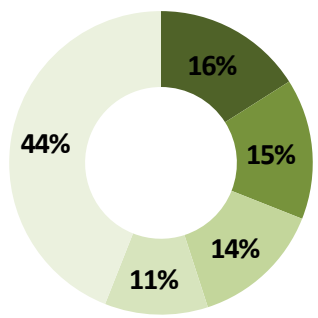
**European Union  
12,8  
Million ha**

**Spain 2  
Million ha**

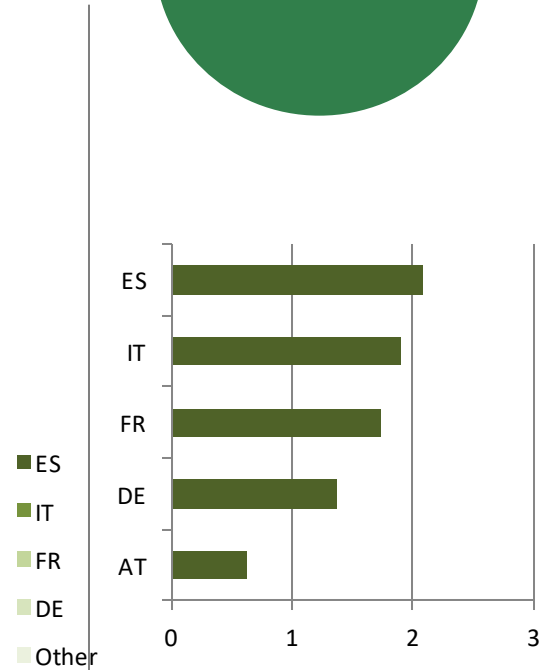
**7,2%  
of EU  
farmland  
is organic**

**+67%  
in the  
decade  
2008-2017**

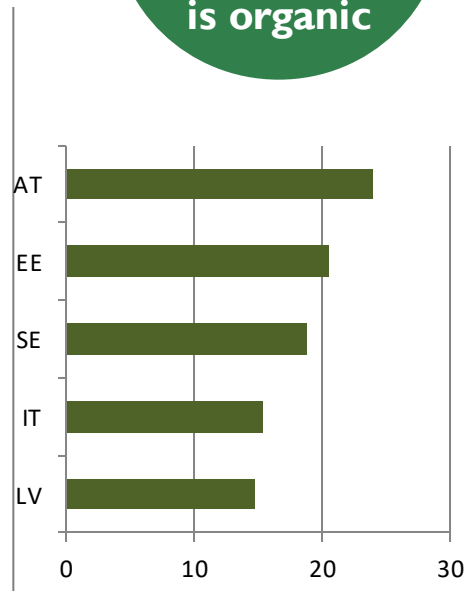
**More than half (56%)  
of EU organic  
farmland is in 4  
countries.**



Share of EU organic land 2017

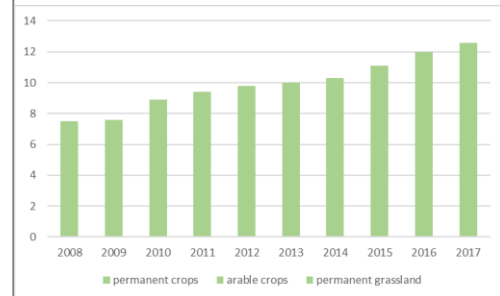


Top 5 countries with the largest areas of organic agricultural land 2017



Eight countries have 10% or more of their agricultural land under organic management.

**+ 5 million hectares in the decade 2008-2017**

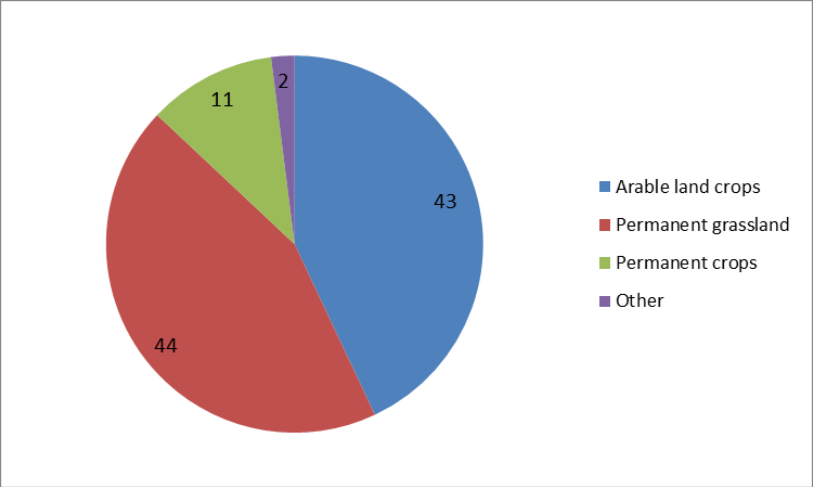


**In 2017, almost 0.85 million hectares more were reported compared with 2016. (+6,4%)**

# EUROPE: ORGANIC FARMLAND 2017



## Land use in organic agriculture (in %)



## Evolution of the land use in organic agriculture (million ha)



# EUROPE: ORGANIC RETAIL SALES 2017



**EUROPEAN UNION  
34.2 BIO €**

The European Union (34,2 billion €) is the second largest single market after the US (40 billion) and followed by China.

**GERMANY  
10 BIO €**

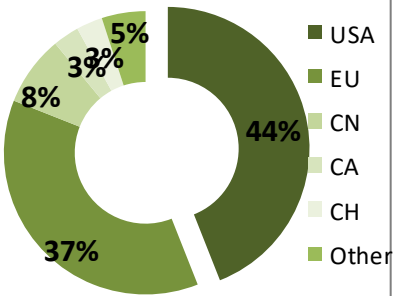
The European countries with the largest markets for organic food are Germany (10 billion €), France (7,9 billion €), Italy (3,1 billion €), and the SE (2,3 billion €).

**227 €  
ARE  
SPENT PER  
PERSON IN  
DENMARK**

Denmark has the highest per capita consumption of organic food in the EU, followed by Sweden and Luxembourg.

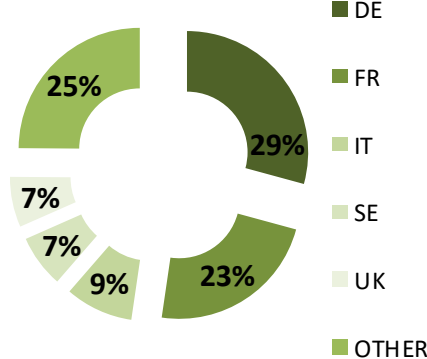
**SHARE OF  
THE FOOD  
MARKET**

In Denmark 13% of the grocery is organic .

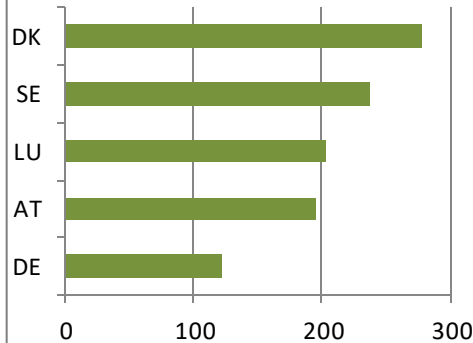


Distribution of retail sales value worldwide by country 2016

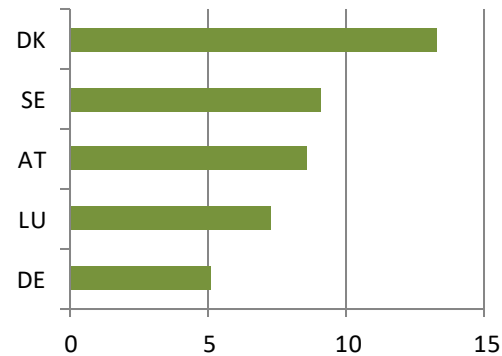
In 2000 organic market worthed around 6,5 bio euro



The countries with the largest markets for organic food 2017



The EU countries with the highest per capita consumption of organic food 2017.





# 2.

## The organic sector in Mexico

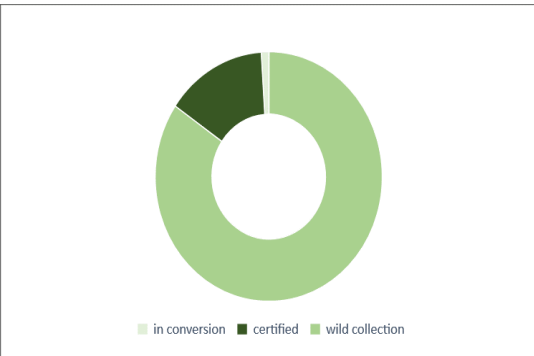
# MEXICO: ORGANIC SECTOR 2017



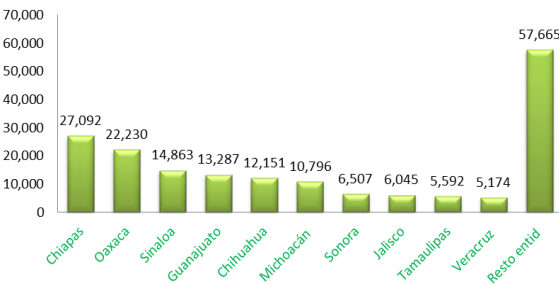
**MEXICO  
1,2  
MILLION  
HECTARS**

**MEXICO  
43,9 MIO  
USD**

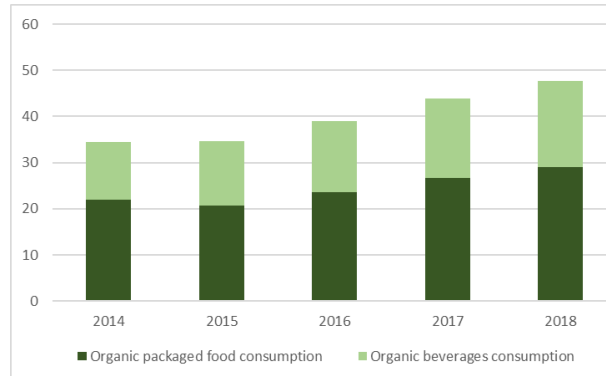
**ORGANIC  
CONSUMPTION  
ON THE  
RAISE**

**Almost 85% of the land is for wild collection, while 15% is certified. The remaining 1% is in conversion.**



- The 33rd largest market in the world by value. Second in the LA region after Brazil.
- Per capita spending is US\$0.36, which ranks as the 42nd largest spending per capita in the world.
- Distribution is confined to specialist stores, supermarkets, and hypermarkets that target high-end consumers.

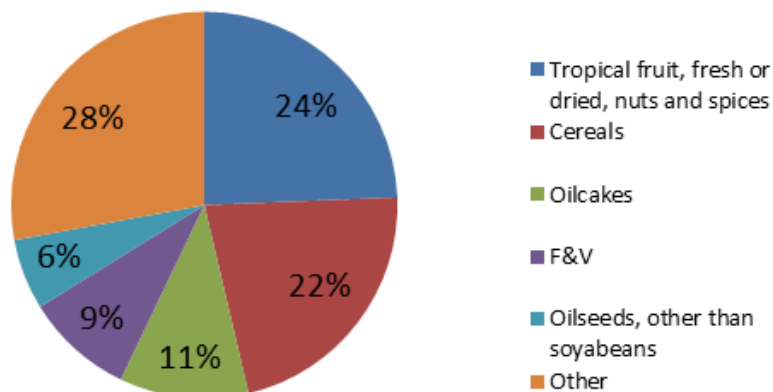


- Organic packaged food sales remain limited to a few categories, including spreads, dairy, ready meals, sauces, dressing, condiments and baby food.
- Spreads accounts for 46% of value sales. Coffee was by far the largest organic beverages category, accounting for 87% of value sales.
- Increase foreseen through 2022, in particular: baby food and fruit/vegetable juice.
- Drivers: millennials entering the workforce and women income

# EUROPE: IMPORTS 2018



**Imports:  
3,26 Million  
tonnes**



Source Traces 2018

**Volume of the organic agri-food imports in to the EU (by product category).**

Rank	PRODUCTS	Tonnes	%
1	Tropical fruit, fresh or dried, nuts and spices	793.597	24,4
2	Oilkakes	352.043	10,8
3	Cereals, other than wheat and rice	255.764	7,8
4	Wheat	243.797	7,5
5	Rice	216.017	6,6
6	Oilseeds, other than soyabeans	192.927	5,9
7	Beet and cane sugar	166.328	5,1
8	Vegetables, fresh, chilled and dried	148.108	4,5
9	Fruit, fresh or dried, exd. citrus & tropical fruit	147.114	4,5
10	other	742.837	22,8
<b>Total</b>		<b>3.258.532</b>	<b>100</b>

**Volume of the organic agri-food imports in to the EU (by country of origin).**

Rank	COUNTRY	Tonnes	%
1	China	415.243	12,7
2	Ecuador	278.475	8,5
3	Dominican Rep.	274.599	8,4
4	Ukraine	266.741	8,2
5	Turkey	264.218	8,1
6	Peru	207.274	6,4
7	US*	170.753	5,2
8	UAE	127.806	3,9
9	India*	125.807	3,9
10	Brazil	72.353	2,2
	Other	1.055.262	32,4
<b>Total</b>		<b>3.258.532</b>	<b>100</b>



# IMPORTS FROM MEXICO 2018



11th EU supplier in volumes

2,2% share of the total imports

Product	tonnes	%
Fruit juices	19.095	26,9
Sugar, other than beet & cane	16.018	22,5
Tropical fruit, fresh or dried, nuts and spices	12.835	18,1
Unroasted coffee, tea in bulk & maté	9.154	12,9
Eggs and honey	5.474	7,7
Citrus fruit	1.933	2,7
Oilseeds, other than soyabeans	1.680	2,4
Gums, resins and plant extracts	984	1,4
Preparations of vegetables, fruit or nuts	916	1,3
Other	2.958	4,2
<b>Total</b>	<b>71.047</b>	

7<sup>th</sup> EU supplier in estimated value

4,3% share of the total imports in estimated value

Higher values products



Rank	PRODUCTS	%
1	Peru	7,8
2	China	7,8
3	Turkey	6,8
4	Dominican Republic	6,8
5	Ecuador	6,5
6	United States	5,6
7	Mexico	4,3
8	Tunisia	4,1
9	India	3,8
10	other	46,6
	<b>Total</b>	<b>100</b>



European  
Commission

# 3.

## The EU organic logo

# THE EU CONTROL AND CERTIFICATION SYSTEM



All operators certified.

Strict control rules.

OFIS: IT tool to communicate between MS on irregularities

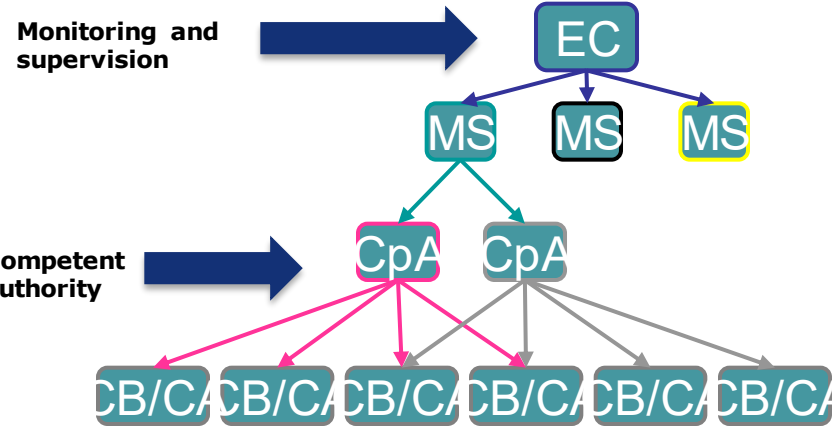
E-COI: compulsory for imports.

European Commission audits in MS and control bodies.

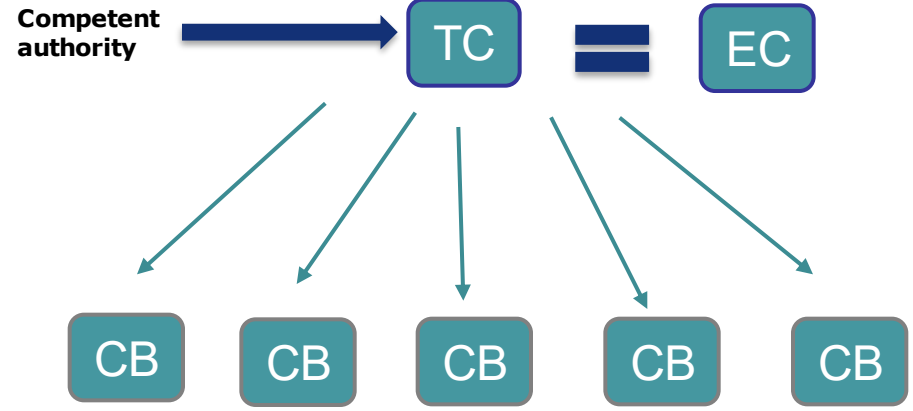
Guidelines for the imports of risky products.

Further improvement in the new Regulation.

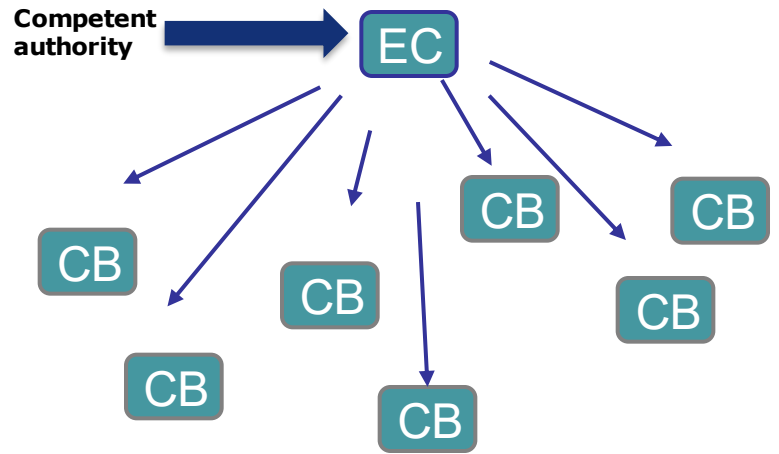
## In Member States



## In equivalent third countries



## Through Control Bodies



# LABELLING OF ORGANIC PRODUCTS



- **Protection of any term referring to organic production, including derivatives or diminutives (bio, eco), in any Community language, for labelling and advertising.**
  
- **Explicitly prohibit the use of these terms for a product submitted to GMO labelling.**
  
- **Compulsory indications:**
  - **code number of the CB/CA**
  - **EU logo**
  - **'EU/non-EU Agriculture'**



# LABELLING OF ORGANIC PRODUCTS



→ National and private logos may be used





European  
Commission

# 4. The certification

# THE CERTIFICATION



## Certification according to EU regulation 834/2007

Currently 21 Control bodies which are recognised to certify organic producers in Mexico against equivalent EU standards.

As from 2021 CB will have to certify against compliance to EU standards.

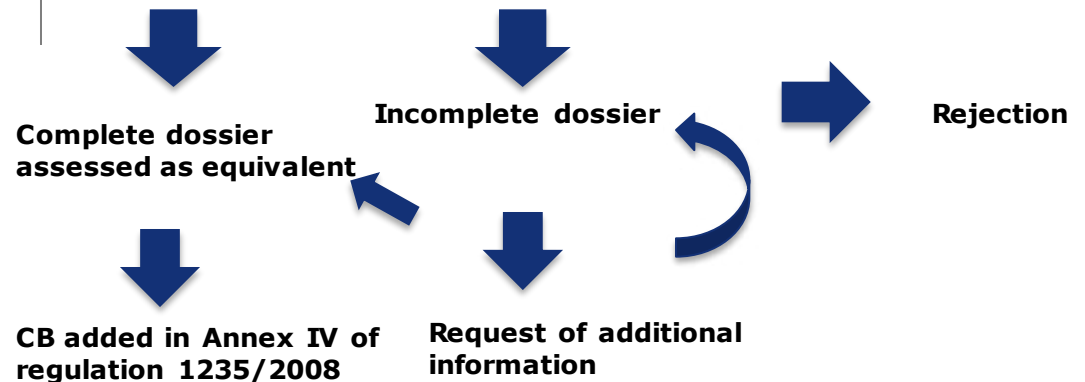


- Up to one year
- Update of the annex twice per year (June and December)

## How to apply for recognition

Set of doc:

- + describing production and control standards,
- +demonstrating that CB has the technical capacity
- + accrediting the equivalence of production and control standards
- +accredited according to ISO standards
- +website with the operators
- +notification of the activities to the local CA
- +regular on the spot evaluation (by the accreditation body)
- +audit report for the HQ and critical locations =





European  
Commission

# 5.

# EU-Mexico organic equivalence





# EQUIVALENCY

**Equivalent third countries: Argentina, Australia, Canada\*, Costa Rica, India, Israel\*, New Zealand\*, Japan\*, Switzerland\*, Tunisia\*, Korea\*, US**

**+ New! - Chile\* (agreement entered into force in JAN 2018)**

**European Commission is responsible for negotiation and supervision with the help of EU Member States**

**Up to 2014, recognition granted through arrangements. Since then, only through international agreements.**

**In the future Regulation (EC) 2018/848**



**INTERNATIONAL AGREEMENT**

# CONTROL BODIES

**European Commission is responsible for recognition and supervision with the help of EU Member States**

**Recognised on the basis of equivalent standards**

**Continuous supervision: annual reports, irregularities notifications, on-the-spot visits, any other information**

**If serious shortcomings => partial or full withdrawal of recognition**



**COMPLIANCE**

# EU-MEXICO EQUIVALENCE



- **Launched in 2016 by Commissioner Hogan**
- **Technical visits started in September 2016 after a thorough assessment of the regulation from both parties.**
- **Follow up visits in December 2018 registered a considerable progress**
- **Continue to exchange information, very good cooperation**

- **Simplification for operators: no need for a double certification to put the product on both markets**
- **Enhanced clarity and security for operators**
- **Reinforced controls on the territory**
- **Enhanced administrative cooperation in particular in the fight against the fraud**



**International  
agreement on  
equivalence of  
standards**



**Thank you for your attention!**

**[http://ec.europa.eu/agriculture/organic/eu-policy/policy-development/index\\_en.htm](http://ec.europa.eu/agriculture/organic/eu-policy/policy-development/index_en.htm)**