



ORGANICS INTERNATIONAL

CONSOLIDATED ANNUAL REPORT OF
IFOAM - ORGANICS INTERNATIONAL

2014

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1 PRESIDENT'S MESSAGE



It is with great pleasure that I welcome you to the IFOAM – Organics International Annual Report 2014. As you will see, both the staff and World Board have had a busy year promoting the multiple benefits of Organic Agriculture and growing the sector around the world.

We have put great effort into building our links with like-minded organizations as well as with governments, the United Nations, intergovernmental organizations, farmers, consumers and businesses. This has helped us to disperse our messages to a much wider audience and also build on both the credibility of Organic Agriculture, and IFOAM as the global umbrella organization.

The highlight of the year was undoubtedly the Organic World Congress (OWC), which took place in Turkey. The OWC continues to be the most important organic event in the world. It is not only an occasion for us to gain greater understanding of the issues affecting you but is also an opportunity for us to learn more, and, of course, a time to celebrate the achievements of the global movement and network with friends and colleagues.

The year 2014 proved important in expanding our relationship and credibility with the United Nations and its organizations. The International Fund for Agricultural Development (IFAD) is funding our Intercontinental Network of Organic Farmers Organizations (INOFO) leadership and mapping project, where we are training the next generation of organic farming leaders from Africa, Asia and Latin America. The project is also developing a list of all organic farming organizations in the world, which will help us expand our reach and membership.

Proof of a strengthened relationship with, for example, the Food and Agriculture Organization of the United Nations (FAO) can be found in the numerous invitations we received to speak at their key events. IFOAM - Organics International was invited to speak at their agroecology conference in Rome, at two FAO sessions at the IUCN World Parks Conference in Sydney, as well as at the launch of World Soils Day and the 2015 International Year of Soils.

The International Year of Family Farming was also celebrated in 2014. We were actively involved in the organizing committee. Staff and World Board members participated in several events including a family farming pre-conference at the OWC in Turkey.

Due to the widespread concern expressed to us by our members, we have renewed our efforts to express our anti-GMO stance, working effectively with like-minded organizations in promoting our messages globally.

Wishing everyone a wonderful 2015.

André Leu

A handwritten signature in black ink, appearing to be 'AL' followed by a flourish.

PRESIDENT, IFOAM - Organics International

THE ORGANIC WORLD IN 2014

at a Glance



INDIA has the largest number of **organic producers**: **650, 000**



AUSTRALIA has the largest area of **organic agricultural land**: **17.2 million hectares**



Falkland Islands (Malvinas) has the highest percentage of **organic agricultural land**: **36.3%**



USA has the largest market for **organic food**: **24,347 million Euros**



Switzerland has the highest **per capita consumption**: **210€**

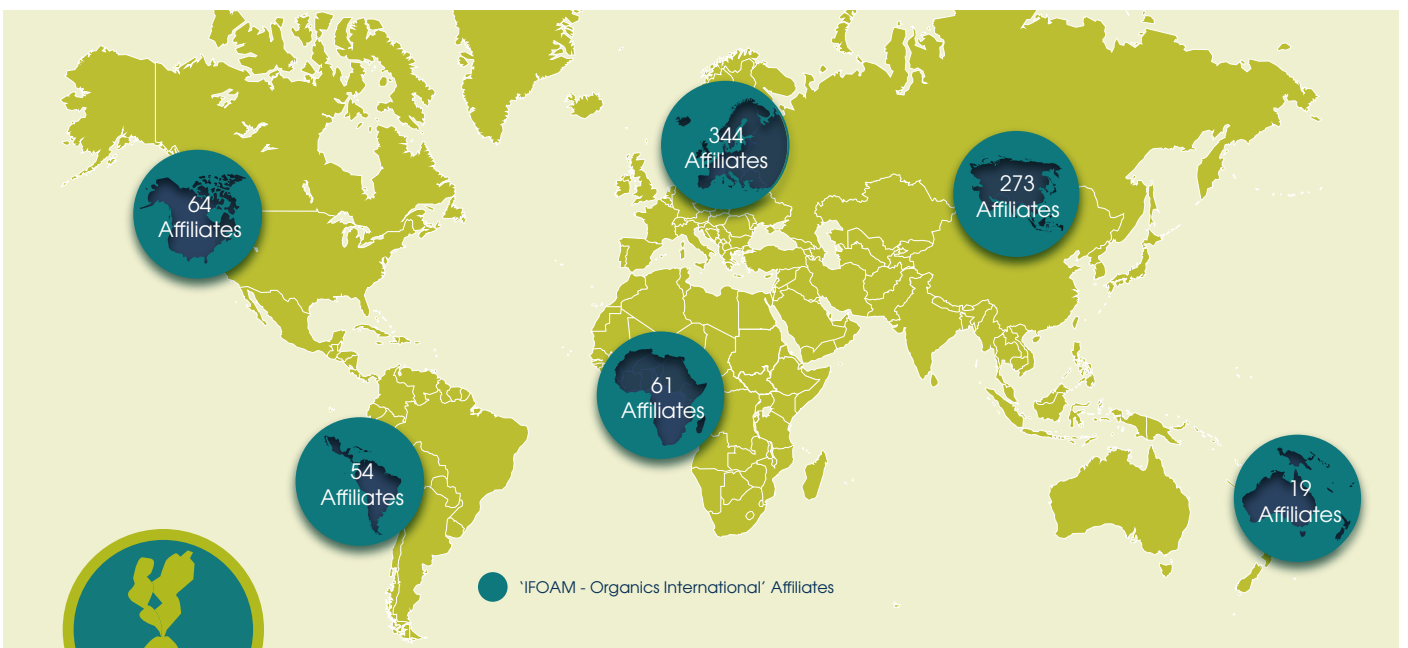
Did you know...?

- We now have **78 million hectares** of organic land compared to **63 million** in the year 2006.
- **170 countries** report organic farming activities compared to **86 countries** in the year 2000.

INDICATOR	GLOBAL TOTALS	LEADING COUNTRIES
Countries with Data on Certified Organic Agriculture	2013: 170 Countries	n/a
Total Organic Agricultural Land	2013: 43.1 million hectares (1999: 11 million hectares)	Australia (17.2 million hectares), Argentina (3.2 million hectares), US (2.2 million hectares, 2011)
Share of Total Agricultural Land	2013: 0.98%	Falkland Islands (Malvinas) (36.3%), Liechtenstein (31%), Austria (19.5%)
Further Organic Areas (mainly wild collection)	2013: 35.1 million hectares (2012: 30.4 million hectares; 2010: 31.7 million hectares)	Finland (9 million hectares), Zambia (6.1 million hectares; 2009), India (5.2 million hectares)
Producers	2013: 2 million producers (2012: 1.9 million producers; 2011: 1.8 million producers)	India (650'000), Uganda (189'610; 2012), Mexico (169'703)
Organic Market Size	2013: 54 billion euro (1999: 15.1 billion euro) Source: Organic Monitor	US (24.3 billion euro), Germany (7.6 billion euro), France (4.4 billion euro)
Per Capita Consumption	2013: 7.03 euro per capita consumption	Switzerland (210 euro), Denmark (163 euros), Luxemburg (157 euro)
Number of Countries with Organic Regulations	2013: 82 countries	n/a
Number of IFOAM Affiliates	2014: 815 affiliates from 120 countries	Germany - 89 affiliates; China - 55 affiliates; USA - 51 affiliates; India - 47 affiliates

Note: Statistical Data as of December 2013.

OUR MEMBERSHIP



69
National Organic
Agriculture
Movements



612 Members



82 Associates



121 Supporters



240
Civil Society
Organizations



36
Governmental /
Semi-governmental
Bodies



275
Companies



264
Others

GLOBAL IFOAM: OUR ACTIVITIES



BUILDING BRIDGES

2014 is the year of the 18th Organic World Congress, of a stronger organic movement and a year of reaching out to allies.

The General Assembly in Istanbul is filled with excitement: The organic movement passes 20 motions, elects a new World Board and decides to meet in India for the next Organic World Congress in 2017.

The core messages from the Organic World Congress remain in everyone's minds and hearts: We deliver solutions to global challenges, but we need to build bridges to ensure a wider application of organic, as well as system reforms. What is successful in 170 countries on 78 million ha for two million farmers needs to be scaled up!

How can we do this? A wealth of ideas is on the table. Examples are the repositioning of Organic Agriculture through organic literacy campaigns, increasing the options to guarantee organic, or building bridges to likeminded movements.

This spirit permeates the entire year, from the IFOAM Mountain Ecosystem conference in Bhutan (held together with our partners Navdanya, Millennium Institute and the Government of Bhutan), to our involvement in the IFAD farmers' forum, the FAO Agroecology conference, the WHO/FAO conference on Health and Nutrition, the Year of Family Farming and Soils, and the International Landscape Forum at CoP 20 in Lima.

But it is not only a year of outreach, but also of addressing pressing challenges.

The plans of the EU to initiate new organic regulations and push organic into an undesirable direction called for IFOAM, joining forces with the IFOAM EU Group, to mobilize its constituents. The success of that action means that the EU is now revising its plan.

We also strengthen our services. The global Organic Guarantee System is now complete and Academy courses are helping to develop the next generation of organic leaders in Asia, Africa and Latin America.

Financially speaking, 2014 is the most difficult one of the last ten years. Yet, thanks to increased capacity to win tenders, new projects will improve our prospects for years to come, true to our principles under the flag of 'Organics International'.



THE ORGANIC UMBRELLA



- Rebranding: 'IFOAM – Organics International'
- Launch of Facebook page
- 18th Organic World Congress
- Launch of online bookshop
- Global representation through BIOFACH

IFOAM – Organics International sets a benchmark in the realm of internet top-level domain names and expands its web presence through social media.

Improved branding of the organization and its work, as well as increased online visibility, are among the priority work areas of the umbrella this year.

With view to better conveying what we stand for, affiliates were asked for input about a possible name change. A series of consultation processes resulted in the selection of the combination IFOAM - Organics International, capturing both the diversity and global nature of our organization. This change is underpinned by a revised visual across all communication materials.

Entering an entirely new field of action, we accompany the launch of the new internet domain name '.BIO' by entering a partnership with registry operator Starting Dot. We jointly develop the criteria used in the '.BIO Domain Name Policy' for the assessment of applications for

the .BIO domain and, being part of the Policy Advisory Committee, we continue this work into 2015.

Our online presence was improved, and we expanded our web outreach via Facebook where you can find us under www.facebook.com/ifoam.organic. Linked to our website, the launch of a new bookshop allows us to make available our publications in a more user-friendly way.

The publication of two videos points to an increased focus on web-based solutions for self-presentation and online visibility.

The department further assures the continued provision of membership-specific services to Global IFOAM, plus two regional groups. It offers support with the development of visual identity solution for Self-organized Structures.

The year draws to a close with a successful Organic World Congress in Istanbul, Turkey that attracted around 1.100 participants from 81 countries.



ORGANIC VALUE CHAIN



- IFOAM Accreditation Requirements V 2.0 replaces 2005 version
- Global number of PGS initiatives surpasses 140
- PGS event at the OWC attracts 170 participants
- GOTS, BioFach, Natrue and 6 other programs (private and governments) refer to the Family of Standards
- IFOAM and bioC partner to launch a global organic certification directory

A comprehensive vision to support organic integrity on a global level.

Since 2010, IFOAM – Organics International has worked towards the implementation of its new vision to support organic integrity on a global level. The year 2014 marks the implementation of this vision, whereby all elements are now in place to offer standard owners, certifying bodies, governments, and other actors of the value chain, the services and tools they need to fully participate in building global organic integrity.

The 2014 version of the IFOAM Norms include fully revised IFOAM Accreditation Requirements and an IFOAM Standard 2.0 that addresses all issues raised by the 2011 General Assembly.

The Family of Standards is now well-established and enjoying growing recognition by various private and government programs.

To complete the picture, a list of IFOAM-approved conformity assessment systems is put in place, based on equivalence against the IROCB (International Requirements for Organic Certification Bodies).

The IFOAM Accreditation concept is adjusted to go hand-in-hand with the Family of Standards, and opened to other accreditation bodies beyond IOAS.

The work on PGS continues, with an improved online PGS platform, some PGS development projects, and a very successful event at the Organic World Congress.

Policy recommendations are synthesized into an organic regulation template for countries with an emerging sector, and also used for advocacy in several other countries.



ORGANIC ADVOCACY



- Farmers' representatives acknowledge the importance of Organic Agriculture at the IFAD Farmers Forum.
- IFOAM – Organics International on stage at launch of the International Year of Soils 2015 in Rome and New York.
- Network of IFOAM Ambassadors established to bring the multiple benefits of organic to a wider audience.

During the International Year of Family Farming our advocacy activities highlight the importance of smallholders in feeding the world. It furthered the mainstreaming of Organic Agriculture in key UN proceedings on sustainability and climate change - issues critical to the future of humankind.

Our activities to promote Organic Agriculture can be summed up as follows:

- At the UNFCCC COP 20 in Lima, we advocate for agriculture to become part of the Paris agreement in 2015 and the recognition of agroecological approaches at meetings with delegates from USA, EU, New Zealand and France.
- At the Global Landscapes Forum we make the case for organic farming as a climate-smart landscape solution and bring together experts from organic-based initiatives with international carbon market experts.
- We highlight Organic Agriculture at the FAO Agroecology Symposium with three presenters speaking on our behalf.



- Andre Leu publishes his book 'The myths of safe pesticides'. It is used as a strategic advocacy tool and is raising awareness among tens of thousands.
- To strengthen our links with likeminded organizations, we are now a member of the Global GMO Free Alliance and are represented in their Steering Committee.
- At the Global Dialogue on Family Farming we speak out for smallholders and agro-ecological approaches in a panel with FAO Director General and the Argentinian Minister of Agriculture. In addition we actively participate as a member of the World Consultative Committee of the International Year of Family Farming.
- We highlight the benefits of organic at the Small Islands Developing States conference in Samoa.
- EU officials learn how Organic Agriculture can counter climate change mitigation and adaptation at our workshop in Brussels.
- Based on our contribution, the civil society vision document adopted at the 2nd International Conference on Nutrition, states that sovereign local food, and agricultural systems should be based on agro-ecological principles.
- The UN Open Working Group proposal on Sustainable Development Goals contains elements we have been long advocating for: A separate goal on hunger; food security, nutrition; and sustainable agriculture. Organic Agriculture fits perfectly: It ensures sustainable food production systems, helps maintain ecosystems, strengthens capacity for adaptation to climate change and preserves genetic diversity of plants and animals.



Advocacy activities are implemented in collaboration with and with support from Hivos.

ORGANIC PROGRAMS



- 3 new projects approved for 2015
- Focus on regional development in Africa
- INOFO strengthened through project activity
- Success in the Korean peninsula

In 2014 our programs support the development of capacity across the value chain, assisting organic development globally, and increasing our reach and relevance in a changing organic landscape.

Following the completion of OSEA II in 2013, the Government of Sweden approves a 4-year follow-up project in the East African region. OTEA (Organic Trade in East Africa) aims to strengthen the achievements of OSEA in local and regional trade, standards development and livelihood improvement for smallholder farmers. In addition, OTEA will also assist in the development of a strong African Organic Network through AfrOnet. Africa also sees the first year of the ProEco Organic Africa project with a focus on productivity in Organic Agriculture.

A focus on Nutrition in Mountain Ecosystems sees the SDC-funded NMA project enter its inception with

collaboration across three continents and five countries.

The IFAD/INOFO project kicks off and delegates from Africa, Asia and Latin America embark on a three-year program to strengthen INOFO's capacity to represent organic farmers' organizations at the highest level. The project activities culminate in face-to-face workshops, the representation of thousands of farmers through their delegates at the INOFO General Assembly and the launch of a global seed network.

Our sustainability outputs are proven by the successful continuation of the OFIA and OAAEA projects with Rural Development Administration (RDA) in South Korea, as well a further three-year EU project approved for the Democratic People's Republic of Korea. These two projects cover the challenging topics of organic conversion, extension support to farmers and innovation in research.



IFOAM ACADEMY



- Over 100 Alumni in 3 years from over 20 countries.
- OWA Award winner Mayor Jun hosts OLC in Philippines
- Successes repeated in Europe, South and East Asia
- Academy serves the organic sector worldwide

The Academy builds leadership capacity, supporting sector sustainability. Apart from the Organic Leadership Course (OLC), the Academy also serves the sector with diverse capacity building programs for its development projects and specialist short courses to serve value chain actors.

The year 2014 is one of many highlights in the short history of the IFOAM Academy. We successfully complete a third South Asian OLC in Kerala, India and add 18 more alumni to the growing network. Europe sees its first group graduate and its second OLC

launched in the Netherlands. A very successful OLC in Latin America concludes with a record 24 graduates from across South and Central America.

East Asia also adds 11 alumni, and we launch a second course in the region with 23 participants from the Southeast Asian region. This group has the privilege to have its first face-to-face in Dumingag, Philippines, hosted by the One World Award winner Mayor Jun. The group is celebrated and honored by the local community, bridges are built, and networks are strengthened through visiting local farmers, colleges and initiatives in the region.

The Academy completes its second training for extension agents in South Korea, and the contract is extended for another three years.

In addition to its work on the OLC and short courses, the Academy also supports the IFAD/INOFO project with a capacity building program for leaders of the global organic farmers' network. This training comprised a one-week face-to-face training for 24 delegates from Asia and Africa in India, and culminated in a face-to-face workshop with 40 delegates from Asia, Africa and Latin America in Turkey preceding the IFOAM OWC. This training program is already bearing fruit, as 11 of the 13 Convenors of the new INOFO Council are members of the program.

The Academy continues to grow, and with the world-wide alumni network, helps IFOAM – Organics International achieve its mission to assist the movement globally.



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'IFOAM ORGANICS INTERNATIONAL' ACTION GROUP

SECTOR PLATFORMS



IFOAM ANIMAL HUSBANDRY ALLIANCE

IAHA

During the 18th IFOAM Organic World Congress IAHA organizes a pre-conference on organic animal husbandry and a workshop session. A motion is passed at the G.A. stating that the head office should support IAHA in developing and promoting an action plan for organic animal husbandry for 2014-2017. The actions proposed include:

- To promote and support initiatives related to animal husbandry, including training and awards.
- To include animal issues in events whenever possible.
- To stimulate governments to establish public policies that strengthen organic animal production, in accordance with the organic principles.
- To support the realization of the 3rd IFOAM Animal Husbandry Conference (2015 or 2016).

IFOAM TECHNOLOGY INNOVATION PLATFORM

TIPI

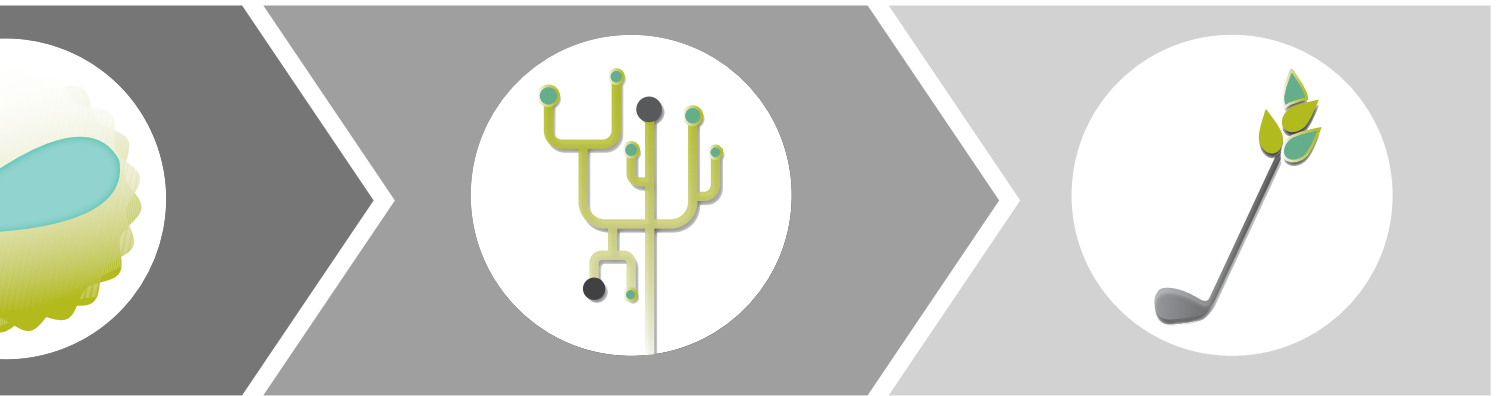
- Organization of Science Day 2014 at BIOFACH in February 2014, together with TP Organics, the European Technology Platform for Organic Farming Research (ISOAFAR) and in collaboration with the International Society of Organic Agriculture Research.
- Compilation of the first draft of TIPI's Global Vision and Strategy for Organic Farming Research, which was presented in Istanbul. Now working on the second draft.
- Organization of the TIPI workshop 'Practitioners' Research Agenda' as a preconference of the Organic World Congress in October 2014 in Istanbul.
- Member Assembly of TIPI, following the TIPI workshop in Istanbul in October 2014.

**IFOAM
INTER-CONTINENTAL
NETWORK OF
ORGANIC FARMERS
ORGANISATIONS
(INOFO)**

- The INOFO General Assembly takes place in Istanbul, Sunday 12th of October 2014 where The Assembly renews the Council of Convenors and initiates the thematic working groups that will operate for the following three years.
- Spokespersons will be mandated by the INOFO Council for various forums at regional or international level or for each new situation that arises.
- INOFO attends the IFAD Farmers Forum in Rome, in February 2012 and 2014, together with many other farmers organisations, notably Via Campesina.
- A capacity building program for INOFO is launched



The Sector Platforms in Action.



**IFOAM
AQUA
CULTURE**

- Group meeting at BIOFACH led to merging of the global IFOAM Aquaculture group and the IFOAM EU Aquaculture Expert group
- Representation of the global organic movement in the ORAQUA project day held in Istanbul, October 2014
- Meetings held in Brussels and London in 2014/15 in particular to get ready for 2015's EU discussions on organic juveniles
- Input provided to EU Commission (DG AGRI and DG MARE) in 2014 on current and future EU Organic Regulation
- Input provided to the Aquaculture consultation initiated by the IFOAM - Organics International World Board

**IFOAM
AMENITY
AGRICULTURE
ALLIANCE**



- The Organic Traditional Medicines and Culture group is set up. Projects are taking place in Heng Qin District, Zhuahai City, close to Macao.
- Continued study of Amenity Agriculture rules.
- HEYDAY ANTAI Fund Management Co. Ltd. set up and works on urban and rural integration. Plan to set up training center in China and Germany from 2015.
- On December 7th, 2014, under the leadership of the Ministry of Agriculture, China, and elected by 21 provinces from China, Liu Qingdong becomes the first President of China Amenity Agriculture and Rural Tourism Alliance.

REGIONAL BODIES & DAUGHTER ORGANIZATION



- Celebration of the successful 20th anniversary of NASAA (Australia) being awarded IFOAM Accreditation;
- Becoming a full member of PAC (Pacific Accreditation Cooperation – a regional group of the IAF representing the interests of Asia-Pacific economies);
- Acceptance of applications from seven more certifiers - the IOAS now provide accreditation and assessment services to over 60 certification bodies around the world;
- In association with the American National Standards Institute (ANSI), we issue the first accreditation under a Joint Assessment Process for Food and Agricultural Product Certification Bodies;
- Improvement of transparency by advising of upcoming surveillance & evaluation visits and applications on the IOAS website;
- Improvement of transparency by publishing surveillance & evaluation visits and applications on our website.



- Constant exchange amongst members in order to build common positions on regulatory and political issues;
- Close work with IFOAM EU on European organic regulations;
- Participation in meetings in Germany, Belgium, Italy and Turkey;
- IFOAM France member, Synbio co-organized a European congress on organic processing in Paris with IFOAM EU;
- IFOAM France launched TPfr, the French technological platform for organic research, linked closely to TPorganics and TIPI, the European and international platforms.



- Dissemination of information on organic agriculture in the Mediterranean;
- Election of a new Regional Board and Permanent Secretariat;
- Organization of an international pre-conference in Istanbul;
- Participation in the Bioguard program;
- BIOL and BIOLMIEL competition (olive oil and honey);
- Participation in conferences, workshops in different countries and important contribution to the development of organic sector.



- We attend the Organic World Congress and General Assembly. This is a strategic opportunity to support motions for the future of IFOAM – Organics International as well as an opportunity to organize a meeting with board members from other regional groups to discuss the work plan for the next three years.
- We facilitate the participation of organic producers in the Organic Leadership Course, convened and funded under the INOFO-IFAD project. 16 organic producers from Mexico, Nicaragua, Puerto Rico, Colombia, Bolivia, Peru and Brazil are participating in this course, which ends in 2016.
- We take part in various meetings and activities during UNFCCC COP20 Lima.



IFOAM Southern Africa represents the interests of organic and like-minded movements in the 15 SADC Member States.

- Office support program developed through the Namibian Organic Association
- Developed an Organic Livestock, Horticulture and Crop Production Manual with the Namibian Organic Association, sponsored by GIZ
- Participated in a South African organic market survey sponsored by GIZ/Naturland
- The ISAN regional stakeholder database is being compiled
- Regular board consultations on the action plan and adaptation of IFOAM communication materials for ISAN authorities.

IFOAM EU GROUP

- Work being done by the EU institutions on the proposal for a new organic regulation started to seriously take the sector's demands into account and come in line with IFOAM EU recommendations in many areas;
- In the lead-up to a landmark decision on GMOs in Europe, IFOAM EU worked with other NGOs to minimize the role of companies in the process. The final decision by the EU allows Member States to ban GMOs, but does not include environmental impact as one of the grounds;
- Italian Minister of Agriculture Maurizio Martina speaks about potential for ecological and innovative solutions at the 8th European Organic Congress.

IFOAM JAPAN

- Three years after the nuclear accident, five national organic bodies organize a seminar and tour around Fukushima in August 2014.;
- The Fukushima Organic Agricultural Network presents a summary of the seminar outcome at the Organic World Congress;
- AFAS Certification Center supported by IFOAM Japan submits a motion speaking out against anti-nuclear power and in favor of promote renewable energy to the General Assembly;
- We represent 'IFOAM – Organics International' at BIOFACH Japan.

IFOAM IRAN

- Host the 2nd International Conference of Trade and Market Development of Organic Products, Tehran, Iran May 11th, 2014;
- Establish the first branch of IFOAM – Organics International in Middle East of Asia, IFOAM-IRAN;
- Develop markets and supply certified organic products;
- Increase public awareness for a better lifestyle, food quality and organic foods through provincial meetings and conferences;
- Building friendship collaborations with recognized governmental and private authorities from different disciplines in order to provide a better structure for the extension of organic farming on a national level.

IFOAM EURO-ASIA

IFOAM Euro-Asia, set up in 2014 is the regional alliance of the Euro-Asian organic movements aimed at assuring the organic food and farming in their respective states.

- A tour around Kyrgyzstan is organized to provide information on and promote Organic Agriculture;
- The yearly Organic Forum Exhibition is organized;
- The project on "The establishment of organic aimak in Issyk Kul region" is launched;
- Promotion of public-private partnerships to raise awareness of Organic Agriculture.

IFOAM asia

- IFOAM Asia under the sponsorship of Goesan County is building an association of Asian local governments to promote organic agriculture especially using the bio-village model. The project aims to link governments and organic NGOs in developing policies, and support measures to improve farmers' livelihoods, sustainable agriculture and rural community development;
- IFOAM Asia nominees Timbaktu Collective of India and Hansalim Federation of South Korea are the joint-Gold Winners of the One World Award 2014;
- A PGS training program is held in Bangladesh and the PGS organic Council of Bangladesh is formed. Other PGS training programs are in development for Indonesia and the Philippines;
- IFOAM Asia is exploring opportunities with URGENCI and other CSA networks to contribute to the World CSA Conference in Beijing in 2015.

14 THE ORGANIC MOVEMENT IN 2014: OUR IMPACT

ORGANIC PRODUCERS

A bottom-up movement, organic emerged in many parts of the world in response to the threats posed to the environment and the livelihoods of farmers and their families. Today, smallholders make up 85% of the world's farmers, provide food to those most in need, and play a fundamental role in the stewardship of biodiversity.

Many of these smallholder farmers are very poor, disadvantaged families and have insufficient access to resources and support. IFOAM - Organics International and many of its affiliates have farmers as one of their main constituents or stakeholders, and orient their strategies towards sustainability in agriculture - which in most cases entails sustainable family and small-scale farming.

Our advocacy and capacity-building activities empower organic smallholders to develop resilient farming systems, value chains and ensure that their voices are heard in international forums. In 2014, we see various global and regional leaders speak out in favor of smallholders pursuing agroecological practices: At the IFAD Farmers' Forum all farmers' representatives unanimously acknowledged the importance of Organic Agriculture; Both the former and the new UN Special Rapporteur on the Right to Food confirmed that only smallholder farmers and agroecology can feed the world; The proposed Sustainable Development Goals include objectives to double the incomes of small-scale food producers and ensure sustainable food production systems that help maintain ecosystems; and the UN recognizes the importance and the contribution of that model with the declaration of the Year of Family Farming.

IFOAM - Organics International continues to mark its presence at UN events, representing farmers and leading a Farmers' Major Group (FAO Committee on World Food Security, (CFS) in the UNFCCC and UNEP), alongside of like-minded allies like the World Farmers' Organisation and La Via Campesina.

A farmer-centered project with the aim of contributing to the empowerment of organic smallholding family farmers in Africa, Asia and Latin America and their own international network (INOFO), was initiated. Adding to the growing recognition of the importance of farmers', IFAD's Farmers' Forum explicitly honors the achievements of organic farming.





‘Old Markets’ and ‘New Markets’: Multiple Growth Reservoirs for Organic Trade

A few years ago, one could have thought that the classical ‘old’ markets for organic products (US and EU mostly) were reaching saturation, while growth in the other ‘new’ markets would remain globally insignificant. The situation now looks totally different.

In 2014 the ‘old markets’ showed that there is no such thing as a ceiling for growth in organic markets, while the ‘new markets’ appeared as a vast reservoir of growth for the global organic trade.

US data in 2014 showed the fastest growth rate (11.5%) in the last five years. Northern European countries show us the path to organic growth in highly developed markets. The record-breaker of growth in ‘old markets’ was Sweden, with 30% growth in the first half of 2014. Denmark, the country with the highest organic market share, shows equally ambitious goals, with the government planning to have 60% organic ingredients in public meals and the country’s leading retailer planning to double organic sales in the next five years.

Sales of organic goods in the domestic markets of the BRIC countries and Mexico have taken off, and given the size of their populations and the growing purchasing

power and health concerns of their middle class, these markets have immense growth potential. Demand could be satisfied by both domestic production and imports.

The US and the EU are well aware of this trend. In 2014, we witness new organic trade negotiation strategies. The EU Commission wants to turn every organic unilateral equivalence agreement into a bilateral one, in order to tap into these new markets. The US starts equivalence negotiations with Mexico, and the pressure has shifted: Mexico is now the second largest export market for organic products from the US (after Canada), with 33% of the sales value (compared to 8% sales in the EU).

China, India and Russia also experience fast growing demand, fuelled partly through imports. Organic sales in China reached 2.4 billion euro in 2013, while Russia is estimated to reach \$225 million worth of sales in 2015, with most organic products being imported from the EU. Even Brazil, despite the technical barriers that it has placed on organic imports, cannot prevent a “rise in imports from various parts of the world” to meet consumer demand, as reported by the Ministry in 2014.

The picture of a global organic trade consisting essentially of the EU and the US importing from the rest of the world is about to change.

ORGANIC SERVICES & DEVELOPMENT



IFOAM – Organics International partners with bioC to offer a Global Organic Certification Directory: A centralized, secure, real-time repository of certified organic operators that protects against fraud, saves time and money for certification bodies and organic companies.

Compliance with certification paperwork now gets a lot easier. In recent years the burden of maintaining compliance with organic certification and accreditation requirements for certification bodies and their operators has grown enormously with the increasing number of standards and regulations globally, as well as the sheer volume of certified entities.

The Organic Certification Directory contributes to addressing the challenges of increasing bureaucracy and the spread of fraudulent certificates. Since the certification body is the only entity that can load certificates into the system, only valid documents appear. Certification bodies and operators can check the Directory, which gets updated constantly, to make sure that lists of operators are complete and valid. Companies and certification bodies can maintain customized lists, and manually check ongoing compliance or receive automated updates when the certification status of any given operator or their product(s) changes.

The savings in time and money resulting from the increase in efficiency and assurance are of benefit to all in the organic sector. The Directory is capable of

storing an unlimited amount of relevant data and is aimed at being inclusive of all countries, government regulations, private standards, certification bodies, and certified operators.

Name	Zip	Town	Codenummer	Details
Biosprossen Zinke e.U.	1020	Wien	AT-BIO-301	
BIOMARTIN KG	1100	Wien	AT-BIO-401	
Bio Getreide Austria GmbH	1100	Wien	AT-BIO-301	
VITA - Bio Lebensmittelhandel e.U.	1110	Wien	AT-BIO-402	
biohelp - biologischer Pflanzenschutz ...	1110	Wien	AT-BIO-301	
basic Austria Bio für alle GmbH	1120	Wien	AT-BIO-301	
Biofisch GmbH	1170	Wien	AT-BIO-301	
pure BIO products Dipl. Ing. Wagner KG	1180	Wien	AT-BIO-301	
Biogast GmbH	1210	Wien	AT-BIO-301	
Biohof Anzböck, GmbH	2000	Zissersdorf	AT-BIO-902	
Biogemüse Haslinger KG	2002	Großmugl	AT-BIO-301	
Bio-Pfeffer KG	2011	Untermailebern	AT-BIO-301	
GERLINDE MAHR BIO-CATERING	2020	Sonnberg	AT-BIO-401	
Niedermayer Martina, Bio Hof Niedermayer	2020	Aspersdorf	AT-BIO-902	
APOYER Biogas GmbH	2042	Obersteinbrunn	AT-BIO-402	
BIO AWO GmbH.	2053	Jetzelsdorf	AT-BIO-301	
Bioökologische Vermastung aG	3084	Melkenfeld, Niederfaltenbach	AT-BIO-301	



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OUR MESSAGES

PAVING THE WAY FOR ORGANIC 3.0



Approximately 1.100 people from 81 countries meet in Turkey for the Organic World Congress, from October 13-15, 2014, and articulated messages of what is needed to make the world a more organic and sustainable place.

Several key messages crystallized out of the main track of the conference and that point the direction for the future development of organic, essential to ensuring its move out of the niche.

Organic Agriculture is Part of the Solution to our Global Challenges! There is growing awareness and recognition outside of the organic movement that Organic Agriculture contributes to overcoming major global challenges, like environmental degradation, climate change, soil fertility, food security, nutrition and health issues and social challenges like poverty. These services to the common good must be recognized and backed by public investment.

Position Organic Agriculture! Organic needs to be positioned as a practical tool to implement sustainability policies and development agendas. Awareness of organic needs to be raised by offering an 'organic literacy training' for governments and decision makers!

Organic Certification for the Future! With the launch of Organic 3.0 we set a sign that organics needs to move on from fulfilling minimum criteria to being truly sustainable. Standards and regulations alone cannot achieve this. Transparency, traceability, new information technologies and true cost accounting are some of

the fundamental topics that need to be addressed in this context.

Organics Beyond Food! Important opportunities in Organic Agriculture beyond food production exist and include cosmetics, textiles and amenity agriculture. Cosmetics and textiles involve complex value chains that still need to be optimized.





Drive Organic out of the Niche! What allows organic to grow beyond the niche may be specific to the local context. Yet, market pull is an important driver, meaning that the different market actors of the value chain need to be engaged and consumers need to be reached through the appropriate messaging.

Make Organic Agriculture Attractive! To attract a new generation of farmers, organic needs to be made attractive and efforts beyond increasing productivity and profitability will be needed. Rural economies need to be fostered in order to create jobs, local infrastructure will need to be invested in, value-adding strategies implemented, capacities will have to be built and innovation will have to be encouraged through participatory research.

Build Trust and Credibility! In order to enhance consumer trust in organics we need to develop simple and inclusive systems that ensure transparency, focus on impact so that products can be benchmarked against each other, build bridges between certified and non-certified organic agriculture, promote short value chains between producers and consumers, particularly supply to schools and urban farming.

Further points of discussion addressed the reduction of



harmful subsidies, the 'polluter pays principle', true cost accounting and the internalisation of external costs, aspects that would allow to rectify frame conditions for agriculture and food systems so that more sustainable systems – particularly organic – have a comparative advantage over conventional ones.

The 'Declaration on Building the Bridge to Organic 3.0', another outcome of the Organic World Congress, echoes the conclusions brought forward through the main track and looks towards developing Organic 3.0, a new concept for how we define our agriculture system, design our lives, and strategize our future. It highlights the potentialities of Organic Agriculture in addressing some of the world's most pressing challenges and proposes a vision of organic principles as the mainstream approach to sustainability, benefitting the common good.

It declares, among other points, that the organic approach to sustainability cannot remain a niche - it should be society's mainstream choice and be supported to continue spreading and improving itself. Organic 3.0 emphasizes the importance of integrative and innovative approaches that effectively support farmers to meet ecological, economic, societal, and cultural challenges. As pointed out by the Director of the Forum for Agricultural Research in Africa (FARA), Yemi Akinbamiyo, especially food security needs to be addressed urgently because "nobody can eat potential."

The Organic World Congress has undoubtedly acted as a think-tank that helps push forward the agenda that must allow organic to transition towards a new paradigm that is also appealing to the next wave of young organic players: **"The big bridge we have to build is to the next generation."** (Former U.S. Deputy Minister of Agriculture, Kathleen Merrigan)

ORGANIC AWARDS



Bio Suisse & Stephen Ng'ang'a receive awards from the OFIA committee.



OWA - The Winners 2014

Organic Farming Innovation Award (OFIA)

Every three years IFOAM – Organics International and the Rural Development Administration (RDA) OFIA) honor the great work of organic innovators with the Organic Farming Innovation Award.

The winners of the 2014 Organic Farming Innovation Awards (OFIA) are announced on 14 October 2014 at an awards ceremony during the Organic World Congress in Istanbul, Turkey. The Grand Prize is awarded to Bio Suisse for their incorporation of fairness principles in their organic system. The Science Prize goes to Mr. Stephen Ng'ang'a Wainaina from the Organic Agriculture Centre of Kenya, for his tree tomato grafting technology, an innovation that enhances resistance to fruit disease, pests and drought.

We congratulate the winners and look forward to honoring more organic farming innovators at the next OFIA ceremony!



MoU Signing for Strategic Partnership between RDA and IFOAM.

One World Award (OWA)

Every two years the German organic food company Rapunzel Naturkost and IFOAM – Organics International honor individuals, projects and innovative ideas that make the world a better and more just place.

Now in their fourth edition, the 2014 awards are presented to:

OWA in Gold – Achieving more together

- Hansalim Association, South Korea: The largest community-supported agriculture organization in the world.
- Timbaktu Collective, India: A collective engaged in poverty alleviation, environmental education and Organic Agriculture.

OWA in Silver – Committed organic pioneers & activists

- Jadranka and Zlatko Pejic, Croatia: Founders of Biovega and organic pioneers.
- Rita Schwentesius, Germany/Mexico: Merited agricultural scientist and instructor of organic farmers.
- Frey family, USA: Founders of a worldwide unique, biodynamic family farm.
- Ibrahima Seck, Senegal: Distinguished co-initiator and coordinator of Africa's organic movement.

IFOAM Lifetime Achievement Award

Dr. Fred Kirschenmann, USA: Supporter of organic farmers on both a political and academic level throughout his life.

FINANCIAL STATEMENT & THANK YOU!

STRATEGIC PARTNERS



WE THANK ALL OUR AFFILIATES, DONORS, CLIENTS, SUPPORTERS AND VOLUNTEERS!

PROJECTS

Over 1,000,000€

- Sida, Sweden

100,000 -250,000€

- IFAD, Italy
- EU Commission, Belgium
- Hivos, The Netherlands

50,000 -100,000€

- Asian Development Bank, Philippines
- RDA, South Korea

10,000 - 50,000€

- UNEP, Kenya
- SDC, Switzerland
- FiBL and SDC, Switzerland/Hivos, Netherlands
- BAESA, South Africa and EuropeAid, Belgium
- Universidad Nacional Agraria La Molina, Peru

5,000 -10,000€

- CTA, The Netherlands
- FiBL, Switzerland
- Bio Suisse, Switzerland
- EOSTA, Netherlands
- Rapunzel, Germany

1,000 - 5,000€

- ICROFS, Denmark
- Louis Bolk Institute, Netherlands
- Naturland, Germany
- Debio, Norway
- Soil Association, UK
- Stichting EKO Keurmerk, Netherlands
- Ecovallia, Spain
- KRAV, Sweden

CLIENTS

50,000 -100,000€

- Nürnberg Messe GmbH

5,000 - 20,000€

- Centro Internacional de Agricultura de Traspasio S.C., Mexico
- IOAS, USA

1,000 - 5,000€

- National Taiwan University, Taiwan
- Promperu, Peru
- Menope, U.A.E.
- KRAV, Sweden
- Bio Suisse, Switzerland
- Sunshine Earth Co., China
- IOIA, USA
- Lu Bai, Germany
- Allan Si, Philippines
- Cleofe Baldon, Philippines
- M. van Bree, Netherlands
- Joseph Puliyarmattathil, India
- Yinghui Zhang, UK

DONATIONS

10,000 - 50,000€

- Bio Suisse, Switzerland
- FiBL, Switzerland

5,000 -10,000€

- DO-IT, Netherlands

1,000-5,000€

- Kamut, USA
- Ludwig Leitjen, Germany

Up to 100€

- Helga Willer, Switzerland
- Christop Habermann, Germany

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ACTIVITIES (€ X 1000)

	INCOME		EXPENSES	
	2014	2013	2014	2013
IFOAM Governance	0	0	80	43
IFOAM Direction	175	158	238	321
Organic Umbrella	398	477	263	336
Organic Advocacy	150	12	115	112
Organic Value Chain	146	265	238	247
Organic Programs	507	1,082	432	891
IFOAM Academy	96	75	129	108
Total	1,472	2,069	1,496	2,058
Annual net income	-23	11		

(Whole statutory statement audited by PwC, Cologne, Germany) **NATURE OF COST**

INCOME AND EXPENSES (€X1000)	AUDITED	AUDITED
Income	2014	2013
Contributions and fees	376	351
Donations	44	41
Other income	349	342
Income from projects	702	1,330
Interest income	1	1
	1,471	2,065
Expenses		
Personnel expenses	880	846
Depreciation	7	7
Administrative expenses	109	230
Internal structures	34	30
Self-organized structures	3	43
Other expenses	123	166
Project expenses	340	735
	1,496	2,058
Result before taxes	-24	7
Tax refund	1	4
Annual net income	-23	11
Retained earnings brought forward	11	28
Liquidation from appropriated reserves	311	283
Transfer to appropriated reserves	-322	-311
Net retained earnings	-23	11

BALANCE SHEET (EURO X 1000)	AUDITED	AUDITED
Assets	2014	2013
A. Fixed assets		
Assets	8	14
B. Current assets		
Trading stock	5	5
Other current assets	205	17
Bank accounts	1,713	752
C. Prepaid expenses	9	5
	1,940	793
Liabilities		
A. Equity		
Appropriated reserves	322	311
Net retained earnings	-23	11
B. Provisions		
Other provisions	41	20
C. Liabilities		
Trade payables	52	119
Other liabilities	18	30
C. Accrued expenses	1,530	302
	1,940	793

*For computational reasons, rounding differences can occur in the tables.

JOIN

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ORGANICS
INTERNATIONAL

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Executive Board: Andre Leu, Manjjo Smith, Frank Eyhorn
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“Organic agriculture provides solutions to many global challenges. We need to reach out in order to achieve the full potential.” – Frank Eyhorn

“Organic is the right path towards the sustainable future of the world. Organic has already integrated into my heart. To make all efforts contributing myself to organic is to reveal the value of my life.”
– Zhou Zejiang

“Food produced following the principles of organic agriculture is the best food possible and should be available to all. An approach of continuous improvement will make organic systems increasingly productive and sustainable.” – Roberto Ugas

“Organic is the only agricultural system that is comprehensively defined to avoid toxic synthetic chemicals such as pesticides and artificial fertilisers, with documented multifunctional benefits that increase biodiversity at every level, improve soil health, increase adaptation to and mitigation of climate change, is increasing the numbers of farmers during a unprecedented period when farmers are leaving in record numbers and brings proven health benefits to consumers, while producing good yields” – André Leu

“I see organic agriculture as our commitment towards the future of this earth.” – Mathew John



IFOAM - Organics International World Board

from left to right, front: Gerold Rahmann, Mathew John, Peggy Miars, Andre Leu

back: Frank Eyhorn, Manjo Smith, Robert Ugas, Eva Torremocha, Gabriella Soto, Zhou Zejiang.

“Organic Farming is Innovation: I see organic as an significant and proven option to manage the future challenges in sustainable food chains throughout the world. ” – Prof. Dr. Gerold Rahmann

“I’m committed to an organic lifestyle because it’s the best choice for people, animals and our planet. I believe in organic as the most sound and healthy option for our sustainable future.”
– Peggy Miars

“Organic farmers are not just talking about it, they are doing it. They are taking the risks, being brave and innovative. All of us, as part of the value change should support this process. ” – Gabriela Soto

“We have only one planet, with defined resource limits. Organic farming’s principles of Health, Ecology, Fairness and Care can lead us to make critical and responsible choices in order to implement proven solutions to sustain and improve life on this planet for all of us.” – Manjo Smith

“I feel comfortable with organic because it’s the system that follows the way in which Nature behaves. And we are part of it, not above it. I dedicate my energy to IFOAM - Organics International, because it fully embraces the diversity of a complex social system, linked to the most important issues for life: food and nutrition.” – Eva Torremocha

