

The private sector perspective on developing an ASEAN organic standards and a system for recognizing conformity assessment

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About OPTA

- Established in 1995 as a non-stock corporation
- Pioneered the organic weekend / weekly market in Philippines in several villages in Makati
- At present, OPTA has 60 members from producers, processors, retailers, academe and others
- Programs and activities include market linkage, policy advocacy, trade fair participation, education and training and market guarantee.

Global and Asian Organic Trends

- Global Organic Consumption
- Global and Asian Organic Production
- Certified Operators in Southeast Asia
- Certified Area in Southeast Asia 2005-2010
- Organic Goods Flowing in ASEAN
- Organic Certification Bodies in ASEAN (2012)

Organic consumption

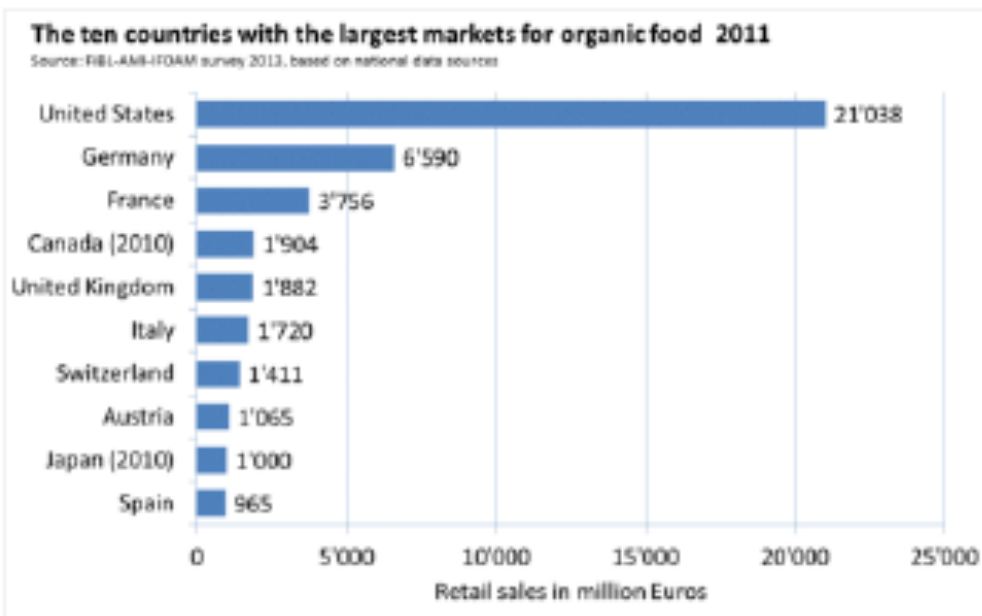
Organic food & drink : a flourishing market

- 2000 – 2010 : market x 4
- 2011 global organic market = 63 billion US dollars



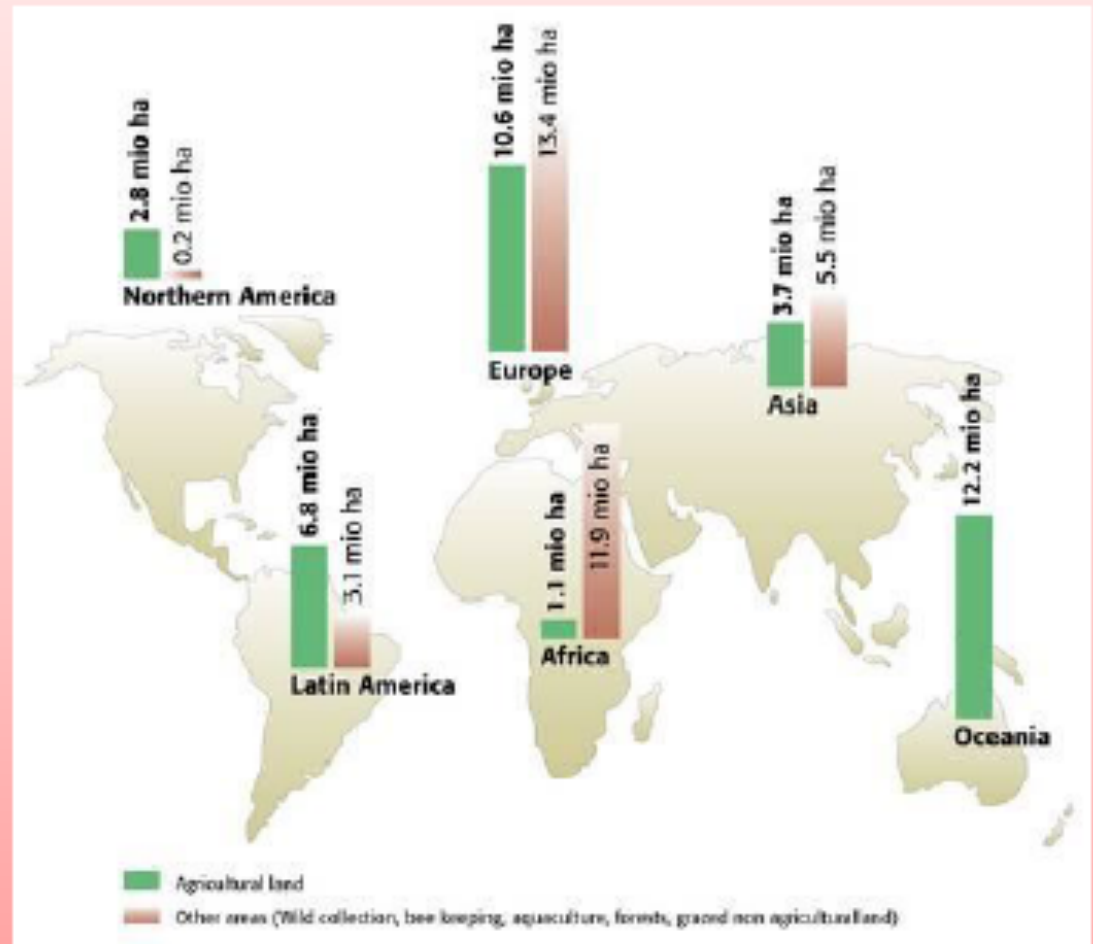
90% of the organic sales in North America + Europe

- US = 30 billion US dollars
- Germany = 9 billion US dollars
- France = 5 billion US dollars



Organic production in the world

World : **70 M** hectares

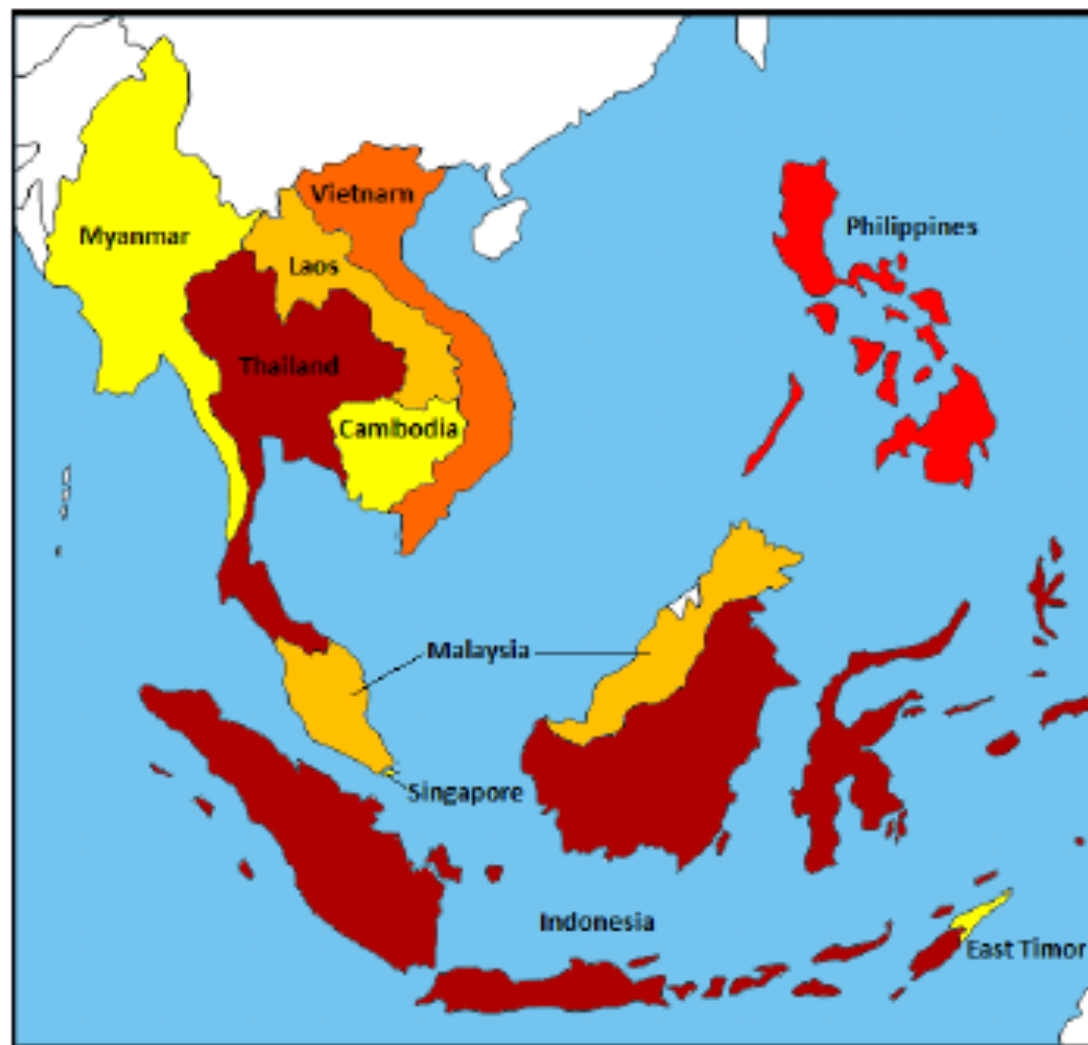
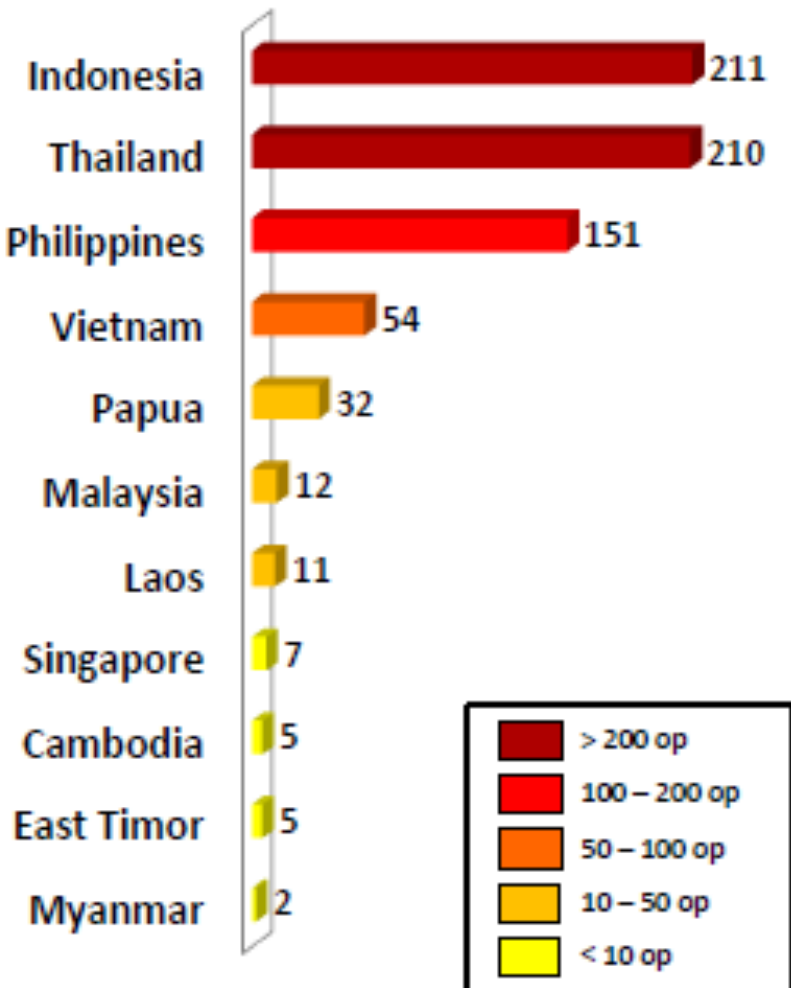


Asia : **9 M** ha

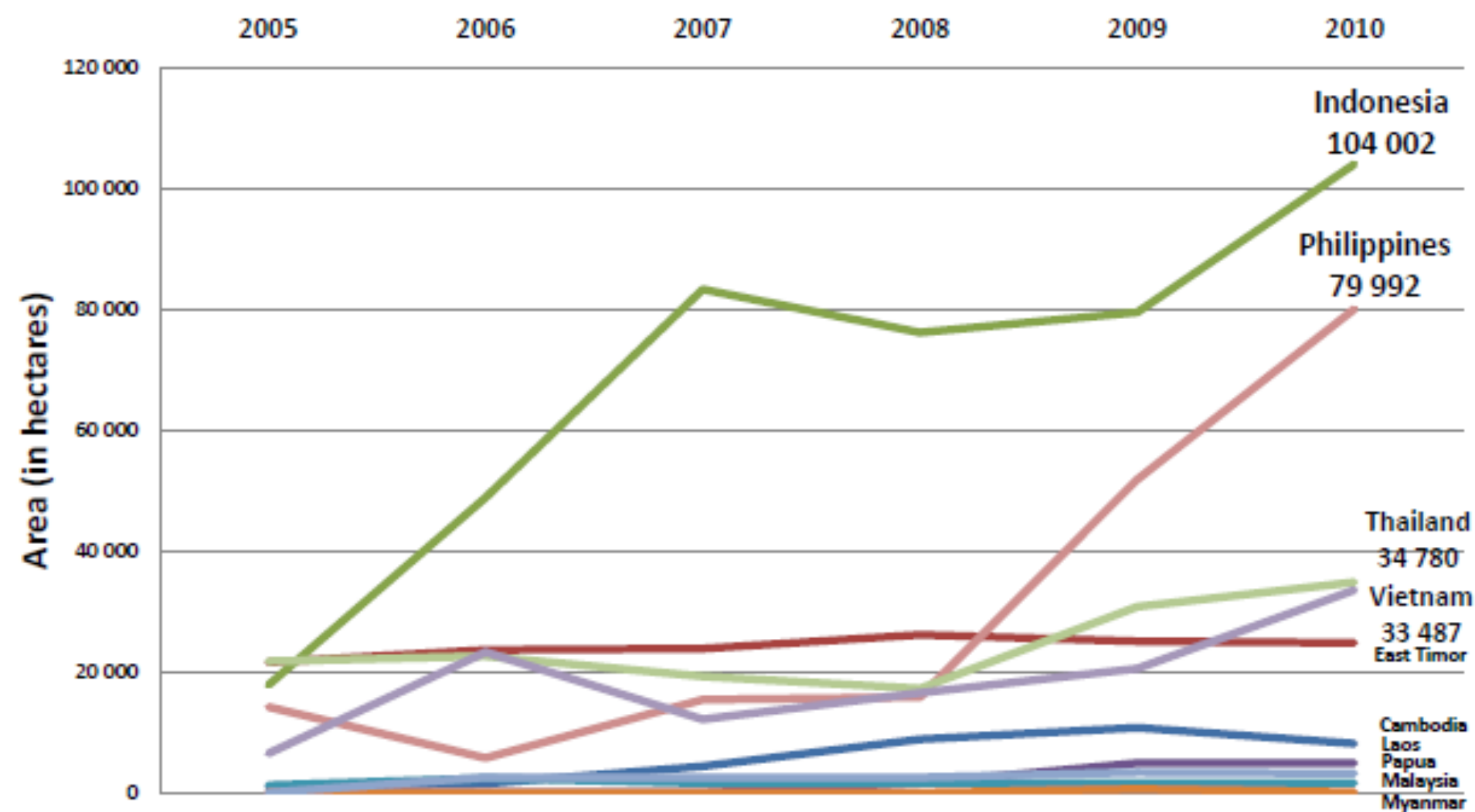
ASEAN: **270 000** ha

Indonesia : **75 000** ha

Geographical distribution of certified operators in South-East Asia



Organic certified area in South-East Asia - 2005-2010



Organic Goods Flowing Among ASEAN

- Very limited at the moment
 - Philippines – Coconut products, fertilizers from seaweeds
 - Indonesia – Coffee, guano
 - Thailand – Rice

Organic Certification Bodies in ASEAN

Country	Local	Foreign (Source: USDA, 01/2013)
Philippines	OCCP, NICERT	BCS, CERES, CUC*, ECOCERT, GOA, IMO, IMZ, Organic Certifiers, OCIA,
Cambodia		ECOCERT
Laos		ECOCERT, OMIC
Malaysia		ECOCERT, ICEA, NASAA
Singapore		CERES, ONECERT
Sri Lanka		CUC
Thailand	**ACT , OCI-DA, NOSA	ACO, BCS, BIOAGRICERT, CERES, CUC, ECOCERT, ICEA, **SOIL ASSOCIATION
Timor Leste		CUC
Vietnam		CERES, CUC, ECOCERT
Indonesia	**BIOCERT, SDS, MA, SUCOFINDO, LESOS, PERSADA, INOFICE, SUMATERA	BIO-INSPECTA, BUREAU VERITAS, CERES, CUC, ECOCERT, ICEA, NASAA, ONECERT; **ACT (**Source: Ecocert)

**Key opportunities and challenges in
developing regional organic
standards and a system for
recognizing conformity assessment**

The Key Opportunity in developing ASEAN organic standards

- Asian Regional Organic Standards
 - A product of private and public collaboration in the region finalized last February 2012;
 - Facilitated in a transparent manner by FAO, IFOAM and UNCTAD;
 - With production and processing standards which allows trading of raw and processed products
 - Appropriate to tropical agriculture conditions with shorter conversion period

The Other Key Opportunity in developing ASEAN organic standards

- ASEAN Economic Community by 2015 based on 4 pillars
 - single market and production base,
 - competitive economic region,
 - equitable economic development, and
 - integration into the global economy

Key challenges in developing ASEAN organic standards

- Companies from member countries have the same commodities or products which may lead to competition or distrust during inspection and certification;
- Most member countries are more oriented towards the lucrative market in Europe and North America with less trading among Members;

Key Opportunities in developing a system for recognizing conformity assessment

- Conformity assessment for organic in ASEAN follows the same rigors for Inspection, Certification & Accreditation which are operational in some member countries like Philippines, Thailand and Indonesia;
- There are many foreign certification bodies operating in the ASEAN countries and some have set up their local branches.
- There are capable local-based organic inspectors operating within the region with international qualifications;

Key Opportunities in developing a system for recognizing conformity assessment

- The ASEAN members can benefit from the Global Organic Market Access Project which developed and made available the following platform or tools for harmonization and equivalence:
 - International Requirements for Organic Certification Bodies
 - Equitools – Common Objectives and Requirements for Organic Standards

Key questions in developing a system for recognizing conformity assessment

- Is there a need to align future system for ASEAN to established international recognition system?
- Can ASEAN develop and operate a different system? Is there an existing capability?
- Is ASEAN involving all stakeholders (local regional and international; producers, traders, CBs, etc) in developing the system?
- Is the process transparent and inclusive?

Sources

- USDA NOP Website
- FiBL
- IFOAM
- Ecocert