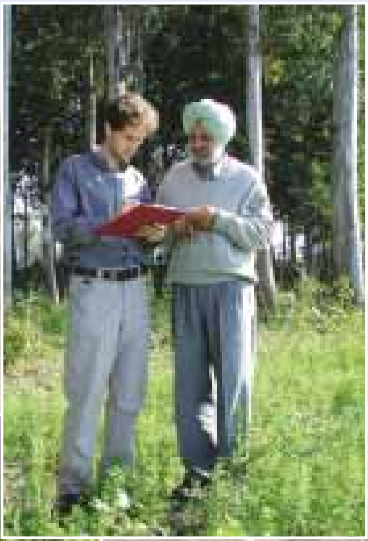
The Organic Market in Switzerland and the European Union

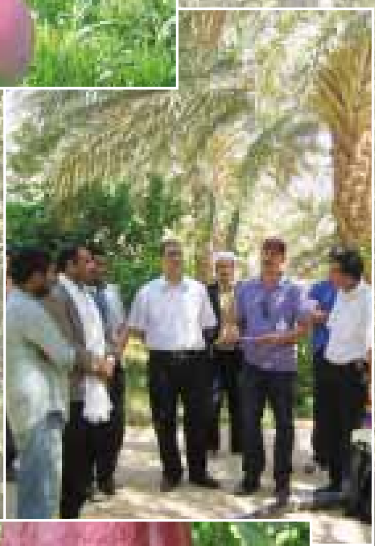
Overview and market access information for producers and international trading companies

FiBL Research Institute of Organic Agriculture (Forschungsinstitut für biologischen Landbau)

sippo swiss import promotion programme

We put your projects on track





- Project and feasibility studies
- Training and advice
- Pilot and demonstration trials
- Conversion planning
- Support for import and label certification
- Set-up of inspection and certification programmes
- Market surveys, marketing concepts and organic produce sourcing

FiBL

Research Institute of Organic Agriculture

Frick (Switzerland):
Postfach, CH-5070 Frick,
Tel. +49 (0)62 865 72 72,
Fax +49 (0)62 865 72 73,
www.fibl.org

Imprint

Publisher
SIPPO Swiss Import Promotion Programme
Stampfenbachstr. 85, CH-8035 Zürich
Switzerland
Tel. +41-1-365-52-00
Fax +41-1-365-52-02
www.sippo.ch
info@sippo.ch

Research Institute of Organic Agriculture (Forschungsinstitut für Biologischen Landbau, FiBL)
Ackerstrasse, CH-5070 Frick
Switzerland
Tel. +41-62-865-72-72
Fax +41-62-865-72-73
www.fibl.org
admin@fibl.ch

Authors
Lukas Kilcher, Ranjana Khanna, Beate Huber, Toralf Richter, Otto Schmid (FiBL), Franziska Staubli (SIPPO)

Collaboration/Revision
Hans Ramseier (BIO SUISSE), Stefan Schönenberger (Swiss Federal Office for Agriculture – Bundesamt für Landwirtschaft)

Translation
Übersetzungsbüro für Umweltwissenschaften,
D-64297 Darmstadt, Germany
ecotranslator@t-online.de

Design
bootzgrolimundbootzbonadei,
CH-8037 Zürich

Press
Druckzentrum Sellenbüren AG,
CH-8143 Sellenbüren-Stallikon,
Switzerland

Edition
2nd Edition, Zurich/Frick, January 2004

ISBN 3-906081-03-6

Contents

Part A: Switzerland

Part B: The European Union

Part C: Annexes Guidelines, Addresses, Forms

SIPPO foreword

More and more consumers want to know what they are eating, and want foods to be healthy and produced without harming the environment. For these reasons, the demand for organic products is now growing worldwide. Emerging markets and markets in transition should also share in the benefits of this demand. Those wishing to export organic products successfully into the EU and Switzerland need accurate information on the potential of the organic market and the conditions for market access. The organic market is highly specific and therefore needs to be studied closely. At the same time it is a market which offers creative and circumspect producers and exporters excellent opportunities for success.

Internationally, it is difficult to find precise and up-to-date facts and figures on organic agriculture. This is particularly true of countries where statistics are not maintained at national level. Most of the statements in this handbook, especially indications of future prospects, are based on the comments of experts. These comments are sourced from interviews conducted in the years 2000 to 2003 by FiBL, the Swiss Research Institute of Organic Agriculture. Additional source material was provided by the International Trade Center's study on the international market for organics, "Organic Food and Beverages", the study "Organic Agriculture World-Wide" from the IFOAM, FiBL and German Foundation Ecology and Agriculture (Stiftung Ökologie und Landbau, SÖL), and further studies and monitoring of the markets conducted by FiBL. In preparing the handbook, SIPPO was able to rely fully on FiBL's competence in all spheres of organic agriculture.

The aim of this brochure is to inform operators in emerging markets and markets in transition about the market potential and the conditions for access to the European and Swiss markets for organic products. To that end, it assembles useful facts and figures, notes and comments and contact addresses. This second edition is updated in all chapters and has in addition three new markets: Austria, Italy and Sweden. It is therefore even more attractive and complete than the first edition.

A further aim of this initiative is to bring suppliers from emerging markets and markets in transition closer to consumers in Europe and Switzerland.

Markus Stern
SIPPO Managing Director

FiBL foreword

Organic agriculture is a sustainable form of agriculture, for both ecological and economic reasons. The move to more intensive and technologized agricultural production and the use of genetically modified organisms entails great ecological risks. Loss of soil fertility, multiplication of diseases and pests and declining biodiversity are the consequences. Rather then constantly seeking to simplify agriculture with increasingly technical interventions, organic agriculture pursues a course of promoting the powers of self-regulation and resistance which soil, plants and animals possess naturally.

Many an agricultural holding subscribes to technical progress, only to reach a dead-end both ecologically and economically. This is because over-production forces prices down while the costs of labour, machinery and capital rise, this in turn forces the farm to extract ever more from its soil and its livestock until it becomes impossible to make ends meet. For many agricultural holdings in emerging markets and markets in transition, implementing costly means of production and technologies is not even an option. They have to make do with what little the farmers themselves can muster.

Organic agriculture is a know-how intensive farming method as it builds on the efficient use of on-farm and local resources: farmyard manure, natural crop protection, local seed, the application of appropriate organic/indigenous management practices such as inter-cropping and agro-forestry and the capability to promote the self-regulation capacity of plants, animals and soil.

Organic agriculture can though, especially in poorer countries, contribute to purposeful socio-economic and ecologically sustainable development. This is due to the organic practice, which is low in inputs and therefore cost effective and at the same time it creates a market – local and international – with tremendous prospects for growth, and offers creative producers and exporters from the south some excellent opportunities to improve incomes and living conditions.

As to whether organic agriculture is a viable proposition for a particular holding, and how to make it a viable proposition, this is something, which can only be clarified in the light of individual circumstances. Through its research, training and advisory services, FiBL works to make organic agriculture practicable and accessible for as many farmers as possible, regardless of crop or region.

Organic agriculture though, as it is our belief, will only have sustained success, if the farmers, farmer groups, traders, technicians and authorities have access to appropriate information and are well prepared for their work. With this handbook, which has come into being, thanks to the support of the Swiss Import Promotion Programme (SIPPO), FiBL and SIPPO want to spread this information and contribute to enabling emerging economies and economies in transition to exploit the opportunities of organic agriculture to the fullest.

Lukas Kilcher
Director of International Cooperation at FiBL

Part A: Switzerland

1. Frequently asked questions on importing organic products into Switzerland

This chapter provides answers to a collection of questions that may arise during the day-to-day commercial operations of a trading company exporting or importing organic products to Switzerland. Most of the answers are followed up with detailed information in the following chapters.

1.1 How does the export of organic products differ from the export of conventional produce?

- *Company Objectives:* In addition to business objectives, ecological and social aspects must also be considered. The latter form the basis of a firm's credibility with its customers, and this

in turn is the foundation for a long-term business relationship.
- *Logistics:* Some privately controlled organic standards do not allow import by air. Transportation may only be sprayed with pesticides or cleansing agents which are specially permitted for use with organic products.
- *Packaging and Declaration:* Packaging must be free from pesticides, colourings, solvents or cleansing agents which could contaminate the organic products. Organic products must be labelled in accordance with the regulations laid down by the Swiss Organic Farming Ordinance (Bioverordnung).
- *Certification:* To have an imported product passed as "organic" in Switzerland, the producers, processors, exporters and importers must undergo inspection and certification at least once a year by an accredited organic inspection and certification body.

1.2 What are the issues to bear in mind when exporting organic products to Switzerland?

Regardless of the product, importers must bear in mind the following aspects:

- The quality of products (prior agreement should be reached with the buyer).
- Avoiding dramatic fluctuations in supply.
- Efficient collection and distribution of the products.
- Thorough documentation of raw-material flows, production land and premises (this reduces the workload and associated costs of inspection).
- Small farmers' cooperatives: ensuring the quality of internal control procedures.
- Coordination of inspections by foreign certification/inspection bodies.
- Competent advice on production, processing and commerce to avoid problems with certification.

1.3 What import documentation is compulsory?

- The exporter must ensure that his certification body submits the Individual authorisation (Part A, Chapter 4.3.6).
- In the case of an individual authorization procedure, the exporter's inspection and certification body must also fill out an "Attestation of Equivalence" (Part A, Chapter 4.3.6).
- If the exported product is intended for marketing under a private organic label, additional documentation may be required by the private organic label organizations.

1.4 What is the "Country List"?

The Swiss Organic Farming Ordinance (Bio-Verordnung SR 910.18) gives a Country List in Annex 4 stating those countries and accredited inspection and certification bodies for which the export formalities are simplified. Exports from countries on the Country List need not present an Attestation of Equivalence, for example. (Part A, Chapter 4.3.6).

1.5 Is certification according to BIO SUISSE standards essential in order to market organic products in Switzerland?

To market a product as organic in Switzerland, the Swiss legal formalities must be satisfied. BIO SUISSE certification is only necessary if the customer wishes to market the product under the BIO SUISSE Knospe label (a graphic depicting a bud and the letters "BIO", shown in Chapter A 4.4.1 of this handbook). However the BIO SUISSE label does make marketing substantially easier. BIO SUISSE is the association of Swiss organic agriculture organizations. It operates its own standards and owns the Knospe label.

1.6 May an exporter from abroad apply to BIO SUISSE for certification of products?

The exporter cannot apply directly to BIO SUISSE for certification of products. The application must be made through a BIO SUISSE licence holder. A list of these can be found at www.bio-suisse.ch. As a matter of principle, BIO SUISSE only grants a licence to firms or producers in Switzerland.

1.7 Are the organic standards in Switzerland stricter than in the EU?

The Swiss Organic Farming Ordinance is stricter than the EU Regulation on Organic Production (Annex II of this handbook) in several points, particularly in its stipulations on whole-farm systems and biodiversity (see the comparison of regulations in Annex III). However the requirements on conversion are less strict than in the EU. Switzerland does not observe a "year zero" (1st year of conversion). Most privately operated label programmes in Switzerland and the EU have certain conditions which exceed the minimum requirements of the Swiss and EU organic regulations.

1.8 Is the Swiss market open to products from emerging markets and markets in transition?

Access to the Swiss market (and also to the EU) for products from emerging markets and markets in transition is regulated by means of regulations on equivalence. The production, processing, inspection, certification and labelling of organic products in emerging markets and markets in transition must take place according to requirements which are equivalent to those of the Swiss Organic Farming Ordinance. This is not to say that identical procedures are imposed. In fact, it is desirable to adapt organic farming standards to local conditions and make use of certification bodies in the emerging markets and markets in transition. The Research Institute of Organic Agriculture (FiBL) in Frick (Switzerland) can be of assistance with feasibility studies and detailed market research.

1.9 Are there separate import quotas for organic products in Switzerland?

No, Switzerland does not impose separate import quotas for agricultural products from organic production on the one hand and conventional produce on the other. Customs law takes no account of whether products are organic or not. The main issue for importers is that import quotas for fruits and vegetables are set, in coordination with the seasonal availability of Swiss products.

1.10 Which inspection and certification bodies are officially recognized in Switzerland?

An inspection and certification body is officially recognized by the Swiss authorities if it:

a) appears in the Country List in Annex 4 of the Ordinance of the Swiss Federal Department of Economic Affairs on Organic Farming (Verordnung des Eidgenössischen Volkswirtschaftsdepartement über die biologische Landwirtschaft SR 910.181) (see also http://www.admin.ch/d/sr/c910_181.html
b) has a valid accreditation document in accordance with either ISO 65 or EN 45011 standards, and is listed with the Swiss authorities (Swiss Federal Office for Agriculture – Bundesamt für Landwirtschaft).

1.11 Why are all the inspections and paperwork necessary?

Consumers of organic products want to be certain that the "organic" label on the outside is a true indication of an "organic" product on the inside. To avoid abuse or fraud, national legislation protects these terms. This is why farmers, processors and traders must submit to an accredited inspection process. As part of this, the entire production cycle must be documented so that, in the event of an objection, a product can be traced back from the final consumer to the original producer.

1.12 What is EUREPGAP and what is the difference between it and organic certification?

The Euro-Retailer Produce Working Group (EUREP) represents leading European food retailers and is aimed at promoting and encouraging best agricultural practices in the farming of fruits and vegetables, in animal production, combinable crops, and also flowers and ornamentals. Therefore, EUREP developed a framework for Good Agricultural Practice, called EUREPGAP. The main aim of the initiative is to ensure food safety in the production chain, in a lesser extent the framework also pays attention to social issues (www.eurep.org/guidelines).

In the light of the recent developments in Europe on food safety, meeting EUREPGAP standards will be more and more necessary for retail suppliers of farm products. It is widely believed that EUREPGAP will become an important international standard. For now, it is only applicable when you want to supply to the supermarkets being part of this initiative.

1.13 What can be done to make the work of customers in Switzerland easier?

It is very helpful if the farm in the exporting country prepares the most comprehensive documentation possible as part of the Attestation of Equivalence. If BIO SUISSE certification is desired, the inspection office must be informed of this intention before the inspection.

1.14 Is the present quality level satisfactory for the Swiss market?

For export, it is necessary to check that the quality of products meets the standards of the target market in Switzerland. This involves not only the requirements of the Swiss Organic Farming Ordinance, but also Swiss food legislation. In general, Swiss consumers have very high expectations in terms of product quality. Organic products must usually meet the same quality standards as conventionally produced goods. The only slight allowances are made in the case of fruits. The requirements also relate to food packaging. It is common practice to provide the importer or potential customer a representative sample of the organically produced products. On this basis, agreement can be reached with the trading partner as to whether the quality is sufficient to satisfy market requirements.

1.15 What are the market prospects of an organic product in Switzerland if it is not marked with the BIO SUISSE Knospe (“bud”) label?

Even organic products without the Knospe label can be marketed successfully in Switzerland, for instance through the large-scale distributor Migros. Smaller retailers market other organic products alongside Knospe products. However the marketing effort made by BIO SUISSE for its Knospe label is considerable. As the “bud” becomes increasingly familiar to consumers, it will become more important to use this label. The symbol possesses high status and credibility in the minds of Swiss consumers.

1.16 Where can export information and figures on the organic market be obtained?

- Details of the statutory foundations of the Swiss Organic Farming Ordinance can be found at www.blw.admin.ch and www.admin.ch.
- The BIO SUISSE homepage (www.bio-suisse.ch) provides information on agriculture in Switzerland and the addresses of BIO SUISSE licence holders together with BIO SUISSE standards and forms.

- The Research Institute of Organic Agriculture (FiBL) in Frick (Switzerland) can be of assistance with feasibility studies and detailed market research projects (www.fibl.org).
- Information on the EU Regulation on Organic Production can be obtained at http://www.europa.eu.int/eur-lex/.

1.17 How can potential business partners in Switzerland be contacted?

Contact can be made with potential (new) business partners in Switzerland in writing, by telephone or in person. An address list can be found at the end of this handbook. Trade fairs are a good opportunity for producers and exporters to present their products to future consumers and traders. One of the most important organic trade fairs internationally is BIOFACH in Germany, which Swiss customers are also likely to attend. Other trade fairs are listed with addresses at the end of this handbook.
In the search for potential business partners, SIPPO – Swiss Import Promotion Programme (www.sippo.ch) – can also be of assistance.

1.18 What are the differences between integrated and organic production?

Compared with conventional methods, integrated production already contains important steps towards more environmentally sound practices in agriculture, such as biological pest control and the utilization of synthetic crop protection agents according to the control threshold principle. Organic production, in contrast to integrated production, bans synthetic crop protection agents, fertilizers and herbicides. Permitted methods of production and labelling conventions for organic products are regulated internationally. Products from integrated production cannot therefore be described as “organic”.

2. The market for food and organic products in Switzerland

2.1 Economics and demographics

2.1.1 Populations and households

Switzerland's 7.3 million inhabitants live in an area of 41,284 km^2. Over half of the population lives in and around Zurich, Basel, Geneva and Berne. Switzerland's population density is 176 inhabitants per km^2. In the next 20 years the population is expected to grow to 7.6 million, the main reason for this trend being increasing life expectancy.

In the year 2020, over 50% of the Swiss population are likely to be over 50 years old. The 50–70 year-old age bracket is considered to have special purchasing power due to its relative affluence and leisure time. In comparison with younger consumers, the food intake per head for older consumers is lower in quantity, but as a group they tend to focus more strongly on quality and health. This consumer segment is thus of particular interest as regards demand for organic products.

In Switzerland there are more than 3 million private households, a figure which continues to rise. This is not just a result of population growth but also of decreasing household size. Smaller households have a greater demand for high value and pre-processed products, and for smaller quantities per package. They are also less price conscious than larger households and they dine out more frequently. They are less inclined to choose organic products than larger households and families with children.

2.1.2 Employment

In Switzerland the proportion of working people above 15 years is about 68%. Almost 77% of all men and 59% of all women in this age bracket were employed in 2002. The distribution of employment by economic sectors shows 4% of Swiss employment to be in agriculture and forestry, 25% in industry and 71% in the service sector (see Table 1).

Table 1: Proportion of population employed and its distribution across sectors in 2002

	Switzerland	EU
Men	77%	73%
Women	59%	53%
Agriculture (Primary Sector)	4%	5%
Industry (Secondary Sector)	25%	39%
Service Sector (Tertiary Sector)	71%	56%

Source: EUROSTAT, 2002

As a consequence of the high employment rate, leisure time in Switzerland is in ever-shorter supply. Domestic chores are increasingly farmed out to service providers, and even for food shopping less time is available.

2.1.3 Consumer prices and spending patterns

Consumer prices have risen considerably in the last few years. In the period between 1997 and 2003, food price inflation was 8.2%, slightly above the average inflation rate for consumer goods and services in Switzerland. In the same period, producer prices for farmers have dropped by 9.2% and is now only 90.8% of the 1997 price level.

Only 8.4% of all consumer spending in 2001 was allocated to foods and beverages, in line with the falling trend that has continued for decades and will persist in future. The main reason for this is the increasing expenditure on insurances, vacations and spare time activities.

2.2 Consumption trends for organic products

2.2.1 Current trends

Although a series of external influences have affected demand for organic products positively in the last few years, there are also consumer trends in Switzerland which counteract higher demand for organic products.

A growing group of quality oriented and price-conscious shoppers
In future, Swiss consumers will become (even) more critical and price conscious when purchasing food. This is conditioned by their high level of education, food scandals, and the growing significance of low prices in the marketing of mass-market retail chains. This means that the most successful marketing of organic products will be achieved where the price premium over conventionally produced products is perceived to be moderate, while organic producers and marketing bodies at the same time project a credible image.

Growing awareness of health and fitness issues
Growing numbers of people, especially older consumers, are focusing on the health aspects of their diet. Younger consumers aspire to ideals of well-being (or "wellness", as it is termed in German-speaking countries). Trend researchers therefore anticipate that demand will grow for organic and diet foods.

Growing awareness of regional specialities
Identification with the home region will increase as a reaction against globalization. Imported products, especially those which could be produced in Switzerland, are greeted with scepticism by certain Swiss consumers.

Growing awareness of environmental issues
The Swiss population has been relatively well sensitized to environmental issues. The involvement of the individual in environmental issues and active concern over food may well increase further. That is a good prerequisite for further growth in the market volume of organic products.

The trend to keep up with trends
One of the key influences on modern consumption patterns is that exerted by the media in general and advertising in particular. This will heighten the trend to purchase according to brand awareness. In this environment it is important for companies marketing organic products to possess a strong brand and to maintain a media presence.

Hybrid purchasing patterns
Purchasing patterns vary according to situation, mood, and the product required. Thus today it is rare to find one standardized consumer group or consumption pattern. Instead, buying behaviour often follows parallel or even contradictory "hybrid" trends. Organic food and convenience food, for example, can be combined without apparent problems.

2.2.2 Consumption patterns for organic products

Organic foods are by no means novel products on the Swiss market. It is more than 50 years since farmers realized the benefits of organic practices on their farms. However the increase in demand has only come to the attention of the food industry and trade in the last 20 years. The increased demand for organic foods is predicated on a variety of key factors:

- **Food safety:** Food scandals such as BSE repeatedly undermine consumer confidence. Consumers question the safety of food production and intensive conventional agriculture
- **Environmental awareness:** Most consumers have been sensitized to environmental issues. Themes such as pesticide residues, recycling and sustainable agriculture are widely debated.
- **Animal welfare:** Consumers are sensitive about intensive livestock rearing which does not fulfil animal welfare requirements.
- **Media attention:** Television, radio and print media constantly draw the population's attention to food safety, environmental issues and animal welfare.
- **Credibility:** Certification systems, label programmes and standards established by legislation have ensured a greater degree of credibility for organic foods. Consumers can now have more faith in the authenticity of the products.

- **Availability:** Since the two largest Swiss supermarket chains COOP and Migros have begun to market organic products actively, it has become more convenient to purchase organic foods. The scope of the organic range in the supermarket chains is also growing continuously.
- **Level of education:** Studies have shown that consumers of organic products tend to have a higher level of education.

There is a parallel range of factors restricting the growth of the market for organic foods:

- **Price:** A high price-differential between organic products and conventionally produced foods is the most powerful limiting factor on demand. However, in comparison to other European countries (Germany, for example) the price differential between organic and conventionally produced foods is lower in Switzerland.
- **Trade and processing structures:** One reason for high prices for organic produce is that distribution is often rather inefficient and involves many intermediaries (separate collection of organic produce in minimal quantities). With increasing availability, larger quantities and more efficient distribution, the price-differential over conventional produce will fall.
- **Availability:** Many branches of the mass-market retail chains still lack a full selection of organic products (e.g. of fruits). This is coupled with the fact that the organic range does not keep pace with every general trend in consumption (e.g. in deep-frozen foods or convenience products). Not only that, there are product sectors in which potential demand far exceeds the available supply (e.g. pork, poultry meat).
- **Quality issues:** In some product groups (for example fruit) the organic products do not always come up to the same visual quality standard as conventional products. Organic products are more prone to show signs of ageing due to their slower turnover rate.
- **GMO-free production:** Neither Swiss nor EU standards for organic products accept the utilization of genetically modified organisms (GMO) in production or processing.

2.2.3 Price premiums and willingness to pay for organic products

Price premiums on organic products vary according to product group and type of market. The average price premium on organic products in Switzerland is 40–50%, which is higher in fruits and vegetables and lowest in milk. The price premiums are dictated in part by higher production and distribution costs and by the willingness of consumers to pay the premium. They tend to be higher in specialist organic food stores/natural food stores and lower in supermarkets and mainstream consumer outlets. In the latter two market types, premiums for the following product groups are approximately:

- Milk/dairy products: 10%
- Vegetables: 40–80%
- Potatoes: 50%
- Cereals/cereal products: 40–50%
- Fruits and nuts: 50–60%

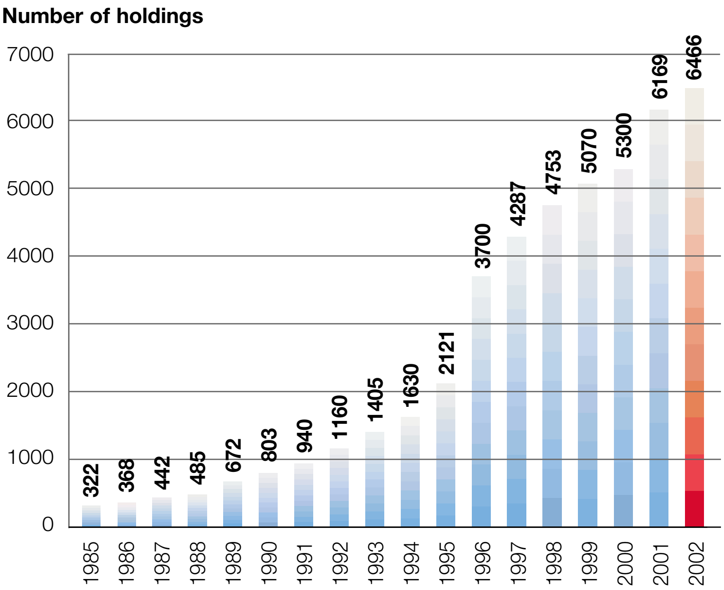
The majority of consumers accept a premium for organic products of between 10 and 30%, with a somewhat greater willingness to pay the premium for plant products produced to organic standards than for organically produced animal products. People are willing to pay a higher premium for speciality products.

2.3 Organic agricultural production in Switzerland

Organic agriculture has undergone dynamic development in Switzerland over the last 10 years. Since the early 1990s it has been acknowledged and promoted by

politicians and government bodies. The area of agricultural land being farmed according to organic standards is expanding rapidly. By the beginning of 2002 it had reached some 103,000 ha. Since the early 1990s, the number of organic holdings has increased almost eight-fold. By the beginning of 2003, the number of organic farms was 6,466. This corresponds to 10.8% of all agricultural holdings in Switzerland. Further growth in farm conversions to organic agriculture is to be expected in the next few years, albeit at a less rapid growth rate.

Figure 1: Development of organic agriculture between 1985 and 2002



Source: BIO SUISSE, 2003

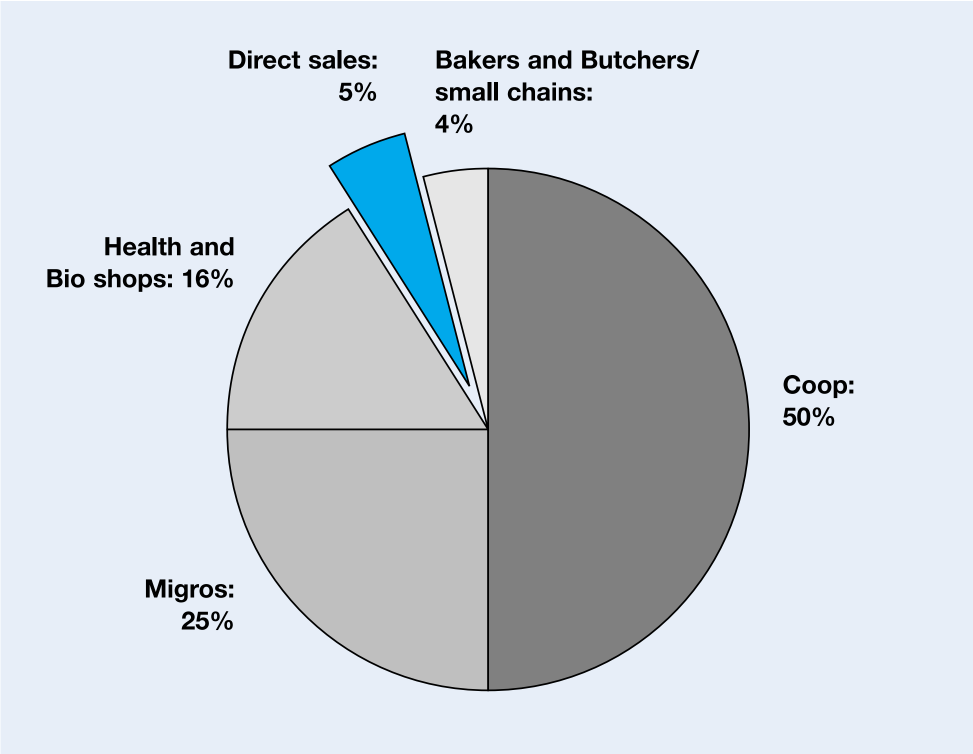
In terms of area, the most significant organic crops grown in Switzerland are bread cereals, fodder cereals, vegetables and potatoes. The main organic products of animal origin are milk, dairy products, meat or meat products and eggs. Dairy products stand out as one of the most important product groups within organic agriculture in Switzerland as a whole.
Organic products are grown in Switzerland on private family farms. The average size of holding is 16 ha.

2.4 Market partners and trade structures

The Swiss organic market is extremely diverse: numerous small and medium-sized firms – sometimes going back decades – are engaged in the supply, processing and distribution of organic products (Figures 2, 3). In 2002 organic products have been responsible for a turnover of € 677 million, which leads to a market share of more

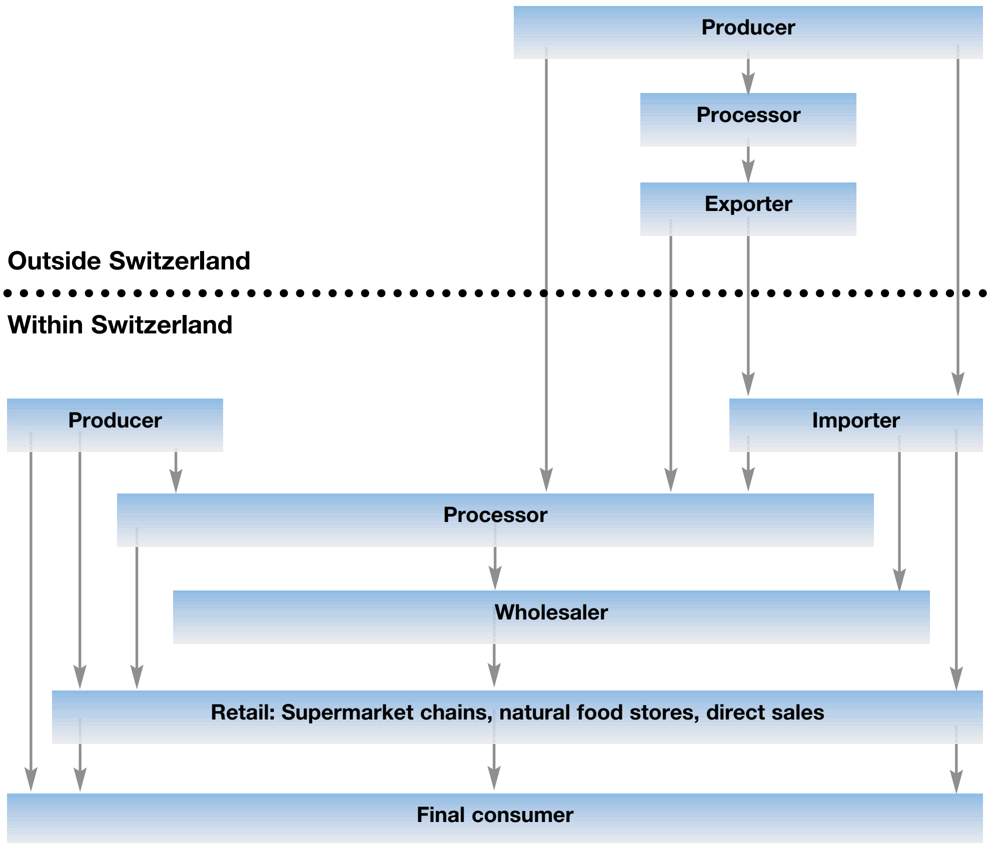
than 3.5% (Swiss info 2003). However two supermarket chains have taken up a dominant position as sales intermediaries: since the entry of the two largest Swiss supermarket chains COOP and Migros, in the early and mid-1990s respectively, sales of organic products have progressed in leaps and bounds. Currently around 75% of all organic products are sold through the two supermarket chains.
In comparison to many other European countries, supermarket chains occupy a dominant position in Switzerland (see Figure 4). Furthermore there are a series of wholesale firms, importers and agents who have specialized in the import of organic products (addresses in Annex IV).

Figure 2: Sales channels for organic products in Switzerland, 2002



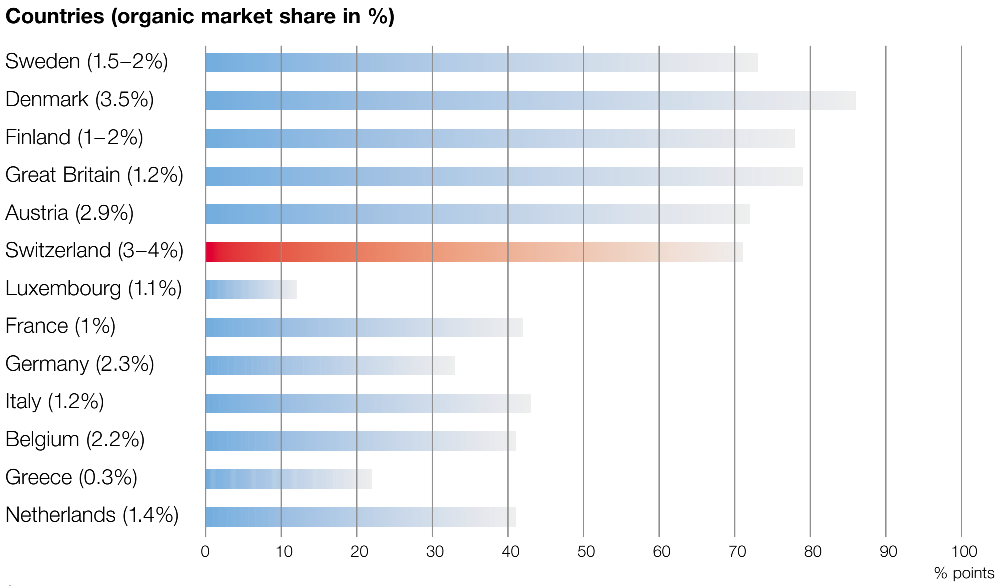
Source: Richter et al., 2003

Figure 3: Trade structures in the Swiss organic market (remains the same)



Source: FiBL

Figure 4: Proportion of organic products marketed through supermarket chains in Switzerland and other European countries



Source: Hamm et al., 2002; FiBL 2003

2.4.1 Supermarket chains

COOP has sold organic products since the early 1990s. In 2002, sales achieved by COOP were CHF 526 million, which represented 50% of all organic foods. COOP has set itself ambitious sales targets: to double turnover in the next few years and gain 10% of market share for key products by 2005. COOP also owns food-processing plants, some of which manufacture organic products. COOP organic products are marketed with the BIO SUISSE label, the Knospe ("bud"). They are also sold under COOP's own trademark "Naturaplan", although under this label animal products may be sold which only conform to integrated production standards, since products of organic quality are not available in sufficient quantities. The certification of COOP organic products is carried out by bio.inspecta. According to figures provided by COOP, the product range extends to over 1'100 organic items and is increasing. COOP also markets textiles made from organic cotton under the "Naturaline" label.

The **Migros** bio label has become increasingly important in Switzerland. In 2002, Migros accounted for 25% of Swiss bio sales and the bio turnover figure was CHF 264 million. The company strives to reach 5–6% organic sales by 2005. Swiss products have a definite priority. The Migros range currently comprises some 850 organic items. Migros is also considerably expanding its range of bio cotton products in the clothing and home textiles sector. These products carry the bio cotton label.

2.4.2 Smaller retail chains

Various wholesalers exist which deal in organic products. The USEGO-Trimerco-Holding purchases products and supplies them to over 5000 retail outlets, including Primo supermarkets, Vis-à-Vis shops and numerous independent retailers, many of whom stock organic products (e.g. "Bio Domaine" products and Knospe products). Other chains such as Volg AG (based in Winterthur), Manor (based in Basel) and Spar (based in St. Gallen) stock organic foods. Annual sales of organic products in these retail chains are currently around CHF 10 million and development is far less dynamic than at COOP or Migros.

2.4.3 Health food stores, specialist organic stores, direct marketing

Until the early 1990s, specialist organic stores were the most important sales outlets for organic products, together with farm-gate sales and weekly farmers' markets. While organic product sales through COOP and Migros are rising steadily, sales of organic products through organic food stores and health food stores have stagnated, as has the direct marketing of organic products by farmers. The annual turnover of organic produce in health food stores and specialist organic outlets was CHF 160 million in 2001 and moved to CHF 170 million in 2002. It can be clearly observed that growth has been very low and slow in comparison with the retail chains. Direct sales have remained equally static since 1997 at around CHF 50 million per year (BIO SUISSE, 2003).

2.4.4 Catering

The marketing of organic products through catering companies and workplace canteens is in the very early stages of development. The turnover of organic products is increasing quite considerably however. Some of the main suppliers are: SV-Service in Zürich, in cooperation with BIO SUISSE (joint project to supply university canteens and COOP restaurants with organic foods).

2.4.5 E-commerce

E-commerce is not the medium of first choice for the food sector, since it is a difficult way to market fresh products. In the case of organic products an additional factor is that the target group does not belong to the most enthusiastic group of Internet users.

In the Business-to-Business sector, efforts are being made to establish electronic commerce. One example is the Greentrade (http://www.greentrade.net). However even this labours under the constraint that dealing with organic products relies primarily on direct contacts.

2.4.6 Organizations for organic agriculture

Swiss organic farmers belong to more than 30 different organizations, practically all of which are members of BIO SUISSE (see Part A 4.4.1).

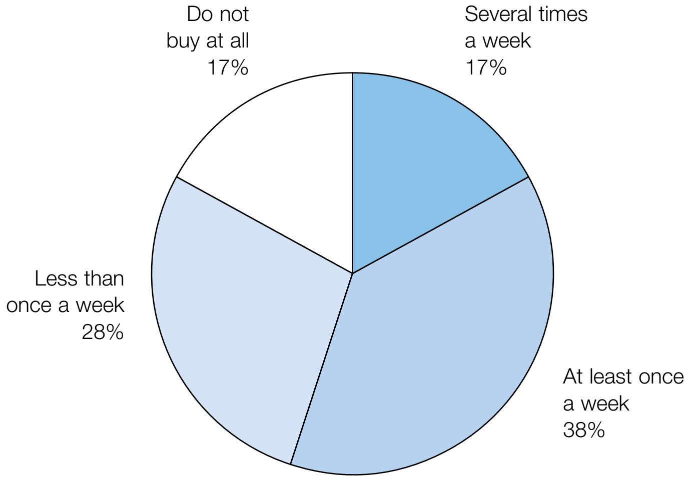
2.4.7 Inspection and certification bodies

To be marketed as organic produce, a product must be certified by an accredited inspection and certification body. The principal inspection and certification body in Switzerland is bio.inspecta AG. It certifies most of the agricultural holdings producing to BIO SUISSE, Demeter and Migros-Bio organic standards. The Bio Test Agro AG firm only carries out inspections of agricultural holdings. Individual processing operations are inspected by the SQS firm (www.sqs.com). The Institute for Market Ecology (Institut für Marktökologie, IMO www.imo.ch) supplements its international activities by inspecting importers, exporters and processing companies in Switzerland.

2.5 Demand and volume of the organic market in Switzerland

Today the great majority of Swiss consumers buy organic products fairly regularly. In response to a BIO SUISSE survey, only a quarter of respondents stated that they bought no organic products (Figure 5).

Figure 5: Frequency of purchase of organic products in Switzerland



Source: Richter et al., 2003

However, shoppers identify not only certified organic products as "organic". Often, true organic products are confused with products from high-welfare livestock management, integrated production or regional label programmes.

Whereas in the past consumers of organic products were mainly those who linked an organic diet with a holistic, ecological lifestyle, today a growing number of average consumers have a positive attitude to organic products. However, this is only transformed into real demand by attractive offers. Thus the entrepreneurial efforts of retail chains in Switzerland are primarily directed towards better fulfilment of consumers' aspirations towards healthy, natural and enjoyable foods, but also towards trend products produced to organic quality.

In line with the increasing demand for organic products, the Swiss organic market is undergoing dynamic development. Turnover of certified organic products was estimated at 1,056 billion CHF (€ 677 million) in 2002 (approx. 3.5% of the entire Swiss food market). Around two thirds of organic products sold in Switzerland can be produced domestically. The remainder is largely constituted of products that are not grown in Switzerland, such as coffee or citrus fruits. Further products are imported to compensate for seasonal fluctuations in supply (e.g. vegetables).

2.6 Importing organic products

In the past, the range of imported organic products was fairly wide, but restricted for a long time in terms of the quantities available, to the occasional frustration of producers, import/exporters and retailers. This can be explained by the following main factors:

- BIO SUISSE dominates the greater part of the Swiss organic market. In the year 2002, 60% of all Swiss organic products were certified according to standards set by BIO SUISSE. BIO SUISSE sets tough requirements for imported products, for example insisting on whole farm organic management, refusing to award the label to competing products, and prohibiting air transport.
- High quality requirements imposed by traders for organic produce.
- Logistical problems affecting imported produce (too small quantities, inadequate distribution network).
- Many consumers of organic foods associate organic farming with regional and seasonal production. With the entry of supermarket chains to the market, the significance of this aspect is now declining.

Despite these factors constraining cross-border trade in organic products, imports of organically produced foods and beverages into Switzerland are constantly rising due to the strong surge in demand, especially for durum wheat, bread and fodder cereals, Soya, rice, citrus fruits and dried fruits. The trend for rising imports is expected to continue in the coming years. The increased demand for organic meat and organic eggs has also enhanced demand for fodder cereals. Currently only around 40% of Switzerland's total requirement for organic cereal is produced in Switzerland. There is really no import of organic milk and milk products.

In general, it is recommendable to use the services of an importer to introduce organic products into Switzerland rather than selling them directly to the food industry or trade. Importers can provide the exporter with information on market conditions, quality standards, market access restrictions and import formalities. Just as importantly, they can provide the logistical service needed in order to reach the customer quickly. In addition, many industrial buyers prefer to obtain goods from familiar intermediary organizations which take on the upfront workload and costs of importation on their behalf.

2.7 Future market development

The development of the Swiss organic market in the nineties and the first years of the new millennium were extremely dynamic. For the future market development, opinions differ quite significantly: the retailers (especially COOP, which happens to be the main retailer of organic products) and BIO SUISSE have a more positive vision of market development than the processors and wholesalers. While on one hand the processors and wholesalers estimate for most product groups that the market-growth will drop down from 20% to 5–10% BIO SUISSE on the other hand considers a doubling of the organic market in the next 3-5 years to an organic product sales of CHF 2 billion as realistic. That would mean at least 20% market growth per year.

At the moment it remains quite unclear by which factors the organic product sales could be driven up to 20% annual market growth. In the last few years the growing rates resulted in a growing penetration rate of organic products in the market and bigger organic assortments per retailer, thus presently nearly each market in Switzerland offers a sufficient organic product assortment. The market seems relatively matured for the moment.

Web information corner for the food and organic market in Switzerland

http://naturaplan.coop.ch/
Information on the NATURA plan range by COOP.

http://www.engagement.ch/
Overview of the Migros supermarket chain.

http://www.miosphere.ch/
Overview of the Migros Bioproducts.

http://www.bionetz.ch
Directories of the organic food stores, restaurants, wholesalers, food processing in Switzerland, recipes and free small-ads.

http://www.bio-suisse.ch/html/e_handel_1.html
Firms licensed by BIO SUISSE to manufacture products by Knospe quality. Searchable database of firms supplying organic products, including addresses.

http://www.bio-suisse.ch/html/e_konsumenten_2.html
Restaurants in Switzerland offering organic products.

http://www.volg.ch
http://www.spar.ch
http://www.manor.ch
Overview of different retail chains.

High market shares and growing rates only could be achieved by a consequent substitution of conventional products with organic products in retail outlets or by an increasing distrust of consumers for the conventional agriculture or by a higher marketing power of the leading marketers of organic products. There is at present no evidence of the above three aspects.

Even if there is a dynamic rate of farm conversions to organic farming for product groups like milk, meat or vegetables additional or extra efforts would be required.

3. Development and potential of the Swiss organic market by product group

Development of the organic market in Switzerland is dynamic and there exists for most product groups a growth potential. This chapter provides companies wishing to import organic products into Switzerland with detailed first-hand information on this development and the potential for organic products in the Swiss market. The data is based on an expert survey recently conducted by the Research Institute of Organic Agriculture (FiBL).

Market data are not currently available for all products. The figures on national and international supply cannot claim to be exhaustive (Table 2). Figure 6 below presents estimated figures and is intended to give an overview of the product groups.

3.1 Significance of imports in the Swiss organic market

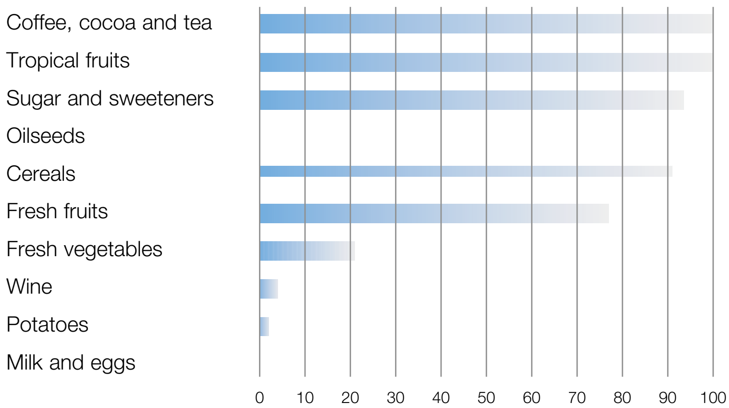
Natural factors limit the options for Swiss production and restrict domestic supply. Ever more imports are flowing into Switzerland due to the high level of demand. The import share differs in size depending on the product group (Table 2 and Figure 6). However, organic products "under conversion" have difficulties in the Swiss market based on the starting market situation for organic products. Therefore, producers must sit out the two-year conversion period before they can export to Switzerland.
By international comparison, Switzerland imports a lower percentage than, e.g. Germany or England, the most important import countries. Historically, based on the relatively high Swiss producer price level and the high tariffs in foreign trade with other countries for most of the products, there have been few exports too. Specialities such as organic chocolate or some cheese are an exception.

Table 2: Domestic supplies and imports in Switzerland, 2001

Product group	Domestic produce (t)	Imports (t)
Cereals	11,800	67,667
Oilseeds	80	8,573
Potatoes	11,000	198
Vegetables	19,700	5,253
Fruits (incl. Nuts)	3,600	10,995
Wine	10,400	433
Milk	191,000	0
Eggs	26,200	0

Source: Omiard unpublished results, 2002

Figure 6: Estimated import share of Organic products in Switzerland



Source: FiBL – estimates 2003
BIO SUISSE – estimates 2003

3.2 Current demand and potential by product group

3.2.1 Fresh and stored vegetables

Fresh vegetables were among the earliest organic products. Over the years this product group has gained a position of great importance in the market. Depending on the type of outlet and the region, over 25% of vegetables sold are of organic quality. This is true not only of the specialist retail trade but also of supermarkets, which now account for over 70%

of organic vegetable sales. In the last few years, annual growth in turnover of 10% has been registered. Growth would remain on a lower level of 5% in the next few years. Experts rate the future market situation for fresh vegetables as very good, and assess that the outlook for stored vegetables will also remain good. In 2002 about 10% of all vegetable sales in Switzerland were organic. In the Supermarket COOP, the main retail sales chain for organic products, about 15% of all vegetables sold were organic, carrots taking the limelight of which nearly 40% of the sales were organic.

Significance and sources of imports
Swiss traders and retailers prefer home-produced goods whenever possible. Nevertheless imports take up an important place to supplement domestic supplies out of the local growing season and to bridge bottlenecks in supply. This calls for quick reactions to the market situation on the part of exporters and importers: since import quotas are determined weekly, they can change quite rapidly. Measured by quantity, imports of fresh vegetables are constantly increasing. The primary countries of origin for imported organic vegetables are Italy and France. Smaller quantities are imported from Spain, The Netherlands, Austria, Israel, Canada, China, USA and Rumania. In future, it is expected that more vegetables will be purchased from the Mediterranean countries, especially in winter and from Israel and Egypt in particular. Germany and Austria can also be expected to supply more organic vegetables, mainly for the processing and winter vegetables out of cold storage such as carrots and onions.

Policy and trade environment
The supply of organic vegetables from the Mediterranean region will continue to grow. This will lead to pressure on prices for the domestic production in Switzerland. At the same time, however, demand from the major retail chains is increasing. The sufficient domestic production combined with the current WTO-compliant customs legislation practically prevents the import of stored cabbage, celery, carrots and beetroot. Swiss import restrictions are the constraining factor: domestic production is protected by high trade duties during phases of good domestic provision. However it is enshrined in law that phase of high duties must be interspersed with the phases of low duties. These periods of low trade duties mostly coincide with periods of insufficient domestic supply (between November and April). The bilateral treaties between the EU and Switzerland should have a stimulating effect on trade in organic vegetables.

Problems and wishes of market operators
- Most Swiss buyers prefer vegetables from neighbouring countries. Vegetables from overseas have little prospect of market access, since various organic labels prohibit import by air.
- Swiss importers want producers to offer more dependable delivery, less logistical workload and very high quality.
- Foreign producers and Swiss importers want more rapid processing of import applications by the Swiss Federal Office for Agriculture and by the organic label organisations (e.g. BIO SUISSE). For example, they should have the option of submitting the accumulated documentation for a complete month rather than for each individual consignment.

- Importers want more transparency in relation to import quotas.
- Foreign producers would like BIO SUISSE to harmonise its agricultural standards with EU regulations.

3.2.2 Processed vegetables

Market situation and potential
The trend in favour of convenience food and ready-to-serve meals has heightened the demand for processed vegetables. The greatest demand is for organic products of Knospe (BIO SUISSE's "bud" label) quality. Some firms have already specialized in this area. For example there is a long-standing tradition of Swiss organic vegetable juices and these are exported worldwide. The newer firms are also interested in exporting processed vegetables. As with fresh vegetables, over half of these products are sold in the COOP and Migros supermarket chains. The trend for processed vegetables will continue to rise. In particular, demand from the restaurant sector is expected to grow. Experts rate the market situation as good in the future.

Significance and sources of imports
Most produce of this type is grown domestically. Imported produce is supplementary in character and mainly restricted to the supply of cauliflower, broccoli and tomatoes. The primary source of processed vegetables is Italy. Smaller quantities are bought from France, Hungary, Germany and the Netherlands. There is some limited scope on the Swiss market for processed vegetables from overseas, provided that they are transported by ship. Given a similar product range, neighbouring countries have better market prospects since transporting goods long-distance from overseas is opposed on ecological grounds.

Policy and trade environment
The situation is similar to that of fresh vegetables (see 3.2.1). The market is not yet as well developed, however. Accordingly there is a lack of information. Some products are in short supply. For example, there are too few suppliers of mushrooms.

Problems and wishes of market operators
- Swiss importers want more suppliers of processed vegetables, specifically mushrooms.
- The problems and expectations coincide with those applying to fresh vegetables.

3.2.3 Fresh fruits

Market situation and potential
In Switzerland organic cultivation of pome and stone fruit underwent a radical improvement in quantity and quality during the 1990s now reaching an amount of 4–5% of the total inland produced fruit market share. The cultivation of organic cherries however has not progressed beyond an early stage because of persistent plant protection problems. Mass-market retail chains have nonetheless a strong interest to complete their organic assortment. In addition to this the general demand for exotic fruit (e.g. citrus, kiwi, banana, mango etc.), also from organic production, has increased considerably. Thus the potential for market development is still attractive, promising good future sales opportunities for fruit. This is particularly

true for fruit species that are still under-represented on the market. The market volume for citrus fruits is currently rising by 10-20% per year. It is expected that by 2008 the market share of fresh fruit will grow moderately but continuously.

Significance and sources of imports
Organic peaches are scarcely grown in Switzerland due to the humid climate and are thus mainly imported from Mediterranean countries. Citrus fruits and exotic fruits are exclusively imported. Lemons and oranges originate from Italy and Spain. Bananas come primarily from the Dominican Republic, Mexico, Uganda, Peru and Cameroon. Mangoes and grapefruits come from Ghana and Cameroon; pineapples, papaya and passion fruits from Ghana and Uganda; figs, pears and apricots from Turkey and berries from Poland. Other fruits come from Israel, Germany, Austria, Argentina and Chile.

Policy and trade environment
The market for organic tropical fruits is still new and has a significant potential in both the delicatessen sector and normal mainstream retail outlets. The level of supply is currently rising world wide, which will have a positive effect on availability and prices. As with fresh vegetables, high import duties are imposed on local fruit varieties at times of sufficient domestic provision. During periods when there are shortfalls in Swiss supply, lower import duties and high import quotas are set for these same fruit species.

Problems and wishes of market operators
- Importers and traders want imported exotic fruit to have a better visual appearance and better storage capabilities.
- Producers of tropical fruits regularly complain of problems in adhering to the strict BIO SUISSE standards. Particular obstacles are the requirement for whole-farm organic management (for example affecting pineapple-holdings) and the ban on imports by air (increasing the need for post-harvest treatment).
- Many consumers make no distinction between organic and fair trade bananas. Therefore consumer information at the point of sale should be improved. Furthermore the use of ethylene to accelerate the ripening process of bananas is a matter of controversy.
- Swiss importers want greater concentration on the retail level of supply, a general increase in supply and with some fruit species an improvement in specific properties.

3.2.4 Fruit juices

Market situation and potential
Apple juice, pear juice and grape juice have been produced in Switzerland for many years, along with juices and pulps from various other fruits (blackcurrants, strawberries, etc.). They have become well established, not only in natural food stores but also in supermarket chain outlets. Even though by the end of the nineties demand for apple, pear and grape-juice increased considerably (80% growth per year), now the main growth in the Swiss organic juice market is in citrus juices. Organic citrus juices have been available in Swiss supermarkets since the year 2000. Citrus is the most important fruit in the juice market and there still is a considerable market growth potential. Other exotic fruit juices such as pineapple and mango on the other hand can only be obtained in specialist stores and rarely in supermarkets, although there is considerable interest in these juices. Demand for exotic juices is expected to rise step by step in the next few years, particularly for organic pineapple juice. Manufacturers of foods for children feature prominently among the buyers of tropical and exotic fruit juices. Experts take a positive view for future development: they expect annual growth in sales of organic juices to reach 20% and more for orange and grapefruit juices and 30% for pineapple juice. Citrus will always be the most important organic juice among the exotic juices especially among the imported organic juices.

Significance and sources of imports
Apple, pear and grape juices originate mainly from Switzerland. It is possible to import small volumes from surrounding European countries. Orange juices are currently imported from Cuba, Brazil, Egypt and Italy. Grapefruit juice comes mainly from Cuba. Other provinces supply juices in smaller quantities for use in baby foods. Latin American countries surpass European countries in the supply of citrus juices because of the better quality.

Policy and trade environment
The well-established market for traditional Swiss juices (apple, pear etc.) is supplemented by organic citrus juices and exotic fruit juices. Switzerland offers an advantageous environment for all organic juices owing to the health conscious customers and especially during winter and spring. Few restrictions are likely.

Problems and wishes of market operators

- For orange juice products, the greatest problems faced by traders are inconsistent supplies and restricted availability. Swiss importers want the reliability of supply to improve considerably.
- Foreign producers of tropical fruits are subject to technical cultivation problems similar to those mentioned in Chapter 3.2.3, although these are less acute since the fruits are processed into juice in the country of production, eliminating the problems of post-harvest treatment. Also transportation by ship is not a problem in the case of juices, since they can be stored for longer periods.

3.2.5 Dried fruits and nuts

Market situation and potential

Dried fruits and nuts from organic production are relatively straightforward from the logistical management point of view and play a key role in composite products like

muesli and baked goods. Rising demand can be expected, particularly from bakers. Nuts are the most important product and offer the greatest potential for growth. Dried fruits are already well established and available both in natural food stores and in supermarkets. The future market prospects are good. In the medium term, annual growth of 5–10% can be expected.

Significance and sources of imports

Products in this group are easy to import into Switzerland: domestic production is far from sufficient to meet existing demand, and the BIO SUISSE ban on importation of organic products by air is not a barrier since the products ship easily and keep well. Nuts are bought primarily from Turkey, almonds from California and Turkey, figs from Turkey and dates from Tunisia and USA. Other dried fruits and nuts come from Morocco, Tunisia, Costa Rica, Togo, Cameroon, Italy and other countries.

Policy and trade environment

Countries in Asia and South America are currently expanding their production and this is likely to boost the supply of competitively priced produce of high quality. Switzerland provides an advantageous environment for the import of dried fruits and nuts.

Problems and wishes of market operators

- Swiss importers expect dried fruits to be of better quality (the quality of nuts has improved dramatically in recent years).
- Foreign producers are critical of Swiss import quotas and want market access to be more liberal.
- The BIO SUISSE standards also pose problems to foreign producers because they are stricter than the EU Regulation. Producers are hoping for international harmonization of these standards.

3.2.6 Culinary and Medicinal herbs

Market situation and potential

Organic culinary and medicinal herbs have long held a place in the Swiss market. Firms such as Weleda and Bioforce have developed top quality products and export organic medicinal products and cosmetics throughout the world. There is a good level of demand in Switzerland but the market has been uneven in its development. Organic medicinal herbs are widely distributed through natural food outlets and drugstores and market potential remains consistently good. Of the imported culinary and tea herbs, around one third go to organic food stores, one third to processing companies and one quarter to mass-market retail chains. The remainder are sold by mail order. The introduction of herbal teas to supermarkets has been very successful and there is great potential. The same is true for culinary herbs. Annual growth in turnover over the last six years was around 15%. With annual market growth realistically estimated at 10%, the market outlook is good.

A proportion of imported herbs, teas and tea ingredients such as thick-skinned fruit is picked in the wild. The requirements imposed on these projects are considerable: adherence to organic standards, clear delineation of the picking area and the matter to be picked, an organization chart for the project, a confirmation of ecological safety and an official picking permit. The proportion of organic herbs and teas collected in the wild is estimated to be less than 5% (no survey data available).

Significance and sources of imports
Domestic production is not sufficient to meet the Swiss demand for herbs. Nonetheless, it is clearly given preference for quality reasons (fresh processing), espe-

cially in the case of medicinal herbs. Imported medicinal herbs are predominantly drawn from surrounding European countries. Spices come from many countries of origin: Albania, Sri Lanka, Indonesia, India, Morocco, Egypt, Turkey, Argentina, Nicaragua, Croatia, France, Hungary and Madagascar. Domestic tea production is able to meet around 20% of demand. Herbal teas are imported from Argentina, Hungary, the Czech Republic, Croatia, and Turkey and in small quantities from France, Tanzania, Sri Lanka and India. Black and green tea comes from Sri Lanka, India, China and Nepal.

Policy and trade environment
Countries of export, both in Europe (Germany, Italy, Austria, England) and overseas (China, Sri Lanka etc.), are strongly expanding production. Furthermore, new suppliers from Eastern Europe and South America (Chile) are forcing their way into the market. Heightened competition in terms of quality and price must now be expected. The quality requirements will rise in future, particularly with regard to the issue of residue-free products.

Problems and wishes of market operators

- Swiss importers repeatedly find fault with the quality of herbs from small farmers' projects and call for better advice and training for producers as well as professional quality management.
- Foreign producers must take care to prevent residues of synthetic crop protection agents (resulting from spray drift from neighbouring fields under conventional cultivation). This could become an increasing problem for tea since more processing is taking place in non-organic processing plants.
- The problem of availability varies according to product group. Swiss importers want continuity of delivery. Problems in cultivation and storage should be reported in good time so that bottlenecks in supply can be rectified more easily.
- The herb and spice trade often consists of small cargoes and therefore suffers disproportionately from administrative obstacles and the high costs of certification.

3.2.7 Cereals and cereal products

Market situation and potential
Cereals and cereal products play a key role in the organic market. Today they are among the top-selling organic products in Switzerland. The main buyers of organic cereals are flour mills, muesli manufacturers and fodder manufacturers. From there, cereal is moved to bakeries or directly to the retail trade. In the last few years, the market for cereal products has shown steady growth of 10–20%. The most important product is organic bread.
Even in supermarkets a good and varied selection is now available. Both wholesalers and retailers assess the future growth potential as good and expect continued

annual sales growth of 5–10%. In the fodder cereals sector, the rising demand for organically produced eggs and pork will increase the need for imported fodder cereals.

Significance and sources of imports
In past years, Switzerland has imported up to 90% of its organic cereals. Cereals are sourced above all from the USA and Canada. Other countries of origin are Ukraine, Brazil, China, Hungary, Austria, Argentina, Australia, France, Italy, Spain, Israel and Morocco. Fodder cereals come

from Ukraine, Rumania, Hungary and Germany. Organic rice is imported from China and Thailand.

Policy and trade environment
In the future, attractively priced offerings are likely to be forthcoming from Eastern Europe. This will raise the level of competition for Swiss producers and for imports from other countries. The Swiss cereal market is tightly regulated. Importers are obliged to take a proportion of domestically produced cereal together with imported bread cereals ("domestic contribution"). Moreover the quantity of imports is subject to quotas. The import of fodder is not restricted, however.

Problems and wishes of market operators

- Swiss importers want cereals of better quality and better continuity of supply.
- Foreign cereal producers report a certain amount of difficulty with the high standards of the Swiss Organic Farming Ordinance (whole-farm organic management).
- Traders and producers are critical of the major barriers imposed by BIO SUISSE to the attestation of equivalence of products. Traders want harmonization of Swiss standards with European standards.

3.2.8 Oil-seeds and oil products

Market situation and potential
The organic oil and oil-seed market has seen major development in the past few years and has now become broadly established. Culinary oils produced to organic standards are imported by medium-sized and large trading companies, mass-market retail chains (Migros, Coop, Jumbo), by the processing industry, flour mills, natural food stores and restaurant and catering businesses. Organic olive oil in particular has gained ground in recent years; growth in turnover at mass-market retailer level has reached a high level.
The other oils have also achieved sales growth of up to 35% in recent years. Swiss buyers are gradually reporting a saturation of demand for sunflower, thistle, linseed, hemp, olive and soya oil produced of organic quality. Since 2004, the use of conventional fodder is restricted. The usage of by-products from oil and oilseeds is only allowed if they are of organic quality. In the next few years, growth in this sector will slow to 10% per year.

Significance and sources of imports
A large proportion of organic oil and oilseed is imported. The most important countries of supply for oil are Argentina, Peru, Guatemala, Mexico, South Africa, Australia, the USA, Canada, Hungary, Italy, Austria and Romania.

Policy and trade environment
The saturation of the Swiss market is dampening the optimism of various Swiss importers. High duties on pre-processed oils and oil-seeds are impeding access to the Swiss market and adding to the cost of imports. In future, increasing supply and growing competition can be expected on the international stage.

Problems and wishes of market operators

- Oils awarded the BIO SUISSE Knospe ("bud") label are substantially more expensive than products without Knospe certification. Importers and wholesalers aim to be more cost-conscious when purchasing, and want a homogenization of price levels. This would facilitate access to the market and give it fresh impetus for growth.
- Importers hope for further liberalization for international trade (reduction of tariffs and fiscal duties) to ease import restrictions.

- More distant countries of production have recurring difficulties with continuity of supply and with certification. Availability and continuity can be addressed by selecting suppliers with different harvest times.

Organic oil-seeds can become contaminated through inappropriate cleaning of transport vehicles. For this reason, imported produce must undergo costly laboratory testing to check its GM0-free status. However there are often discrepancies between the test results of different laboratories on the same produce.

3.2.9 Protein crops

Market situation and potential

Beans, peas, lentils, soya beans and other protein crops are subsidiary elements in the Swiss organic selection in terms of value and quantity. Accordingly the momentum of this segment is fairly modest. Its significance in completing the range should not be underestimated, however. The principal purchaser of protein crops is the processing industry. The market situation for protein crops is currently good, with modest annual sales growth (maximum 10%). The opportunities for development are limited since annual sales growth is unlikely to rise above 10% and is thus below the general growth rate of the organic market in Switzerland.

Significance and sources of imports

The import share is very high in this product group. Lupins and peas are primarily imported from Hungary, the USA, Canada, China, Brazil and Argentina. Soya comes from the USA, Canada, Argentina, Italy, Hungary, Austria, Romania, Peru, Guatemala, Mexico, South Africa, Brazil and Australia.

Policy and trade environment

International supply is increasing but Swiss demand remains modest. This means that despite good general conditions (no duties or special regulations) Switzerland as a national market is not of great interest for protein crops.

Problems and wishes of market operators

The overriding problem is the low consumption of protein crops in Switzerland. With the new regulations in animal feeding the demand for organic protein crops will increase in 2004 marginally. However considering the coming regulation of 100% organic fodder in animal feed in 2009 the organic market will expect an increased demand for protein crops for fodder.

3.2.10 Wine

Market situation and potential

Switzerland is one of the most attractive wine markets. Consumption per head is one of the highest in the world (comparable with southern Europe). About 23,000 hl of organic wine is consumed per year, of which 10,000 hl is produced in Switzerland and 13,000 hl is imported. There are about 250 ha of organic wine area in Switzerland of the total of 15,000 ha under wine cultivation. The organic wine consumed is 0.8% of the total consumption. The organic wine produced in Switzerland is mostly sold directly, but retail chains like Coop, Delinat, and Weinhandlung am Küferweg market those imported. Organic wine occupies an important position in the organic product selection and is a luxury item. Annual growth over the next few years is expected to be 5%. Overall the organic wine market will continue to develop well.

Significance and sources of imports
More red wine is produced, imported and consumed than white wine. Organic red wine is imported for the most part, mainly from the wine-growing countries of southern Europe: France, Italy, Spain, Croatia and Portugal. Small quantities also come from Austria and Germany. Organic rum comes mainly from Paraguay.

Policy and trade environment
For organic wine from Europe, the conditions in Switzerland are advantageous. There is no fear of competitors from out-

side Europe (at least for the time being) since the most important wine importers steer clear of organic wine from overseas for quality reasons (personal contact with producers) and for ecological motives (transport).

Problems and wishes of market operators
Even though the present quality of organic wine is considered good it is important that quality standards are preserved and even further improved.

3.2.11 Sugar

Market situation and potential
Organic sugar is sent mostly to the processing industry. There is also a demand from the retail trade since the supermarkets also sell organic sugar. As availability has improved in the last few years, the market has begun to show positive development. Traders reported growth in turnover of 10–15% in the 1997–2000 period. There is very good potential in the retail sector and the processing industry. Annual growth of 5–10% is expected for the next few years. Due to obligation to use organic sugar in the processing industry and in parallel to the growing market for organic convenience foodstuffs, the demand for organic sugar will steadily grow in the near future.

Significance and sources of imports
Organic sugar is mostly an imported product at present. Few years ago a Swiss processor did set up a domestic production unit of organic sugar of Swiss and Southern Germany sugar beets. However imports are still important especially for cane sugar. Swiss importers obtain their organic cane sugar mainly from Paraguay, Costa Rica and Brazil. Smaller quantities also come from the Philippines. Maple syrup is imported from Canada.

Policy and trade environment
Additional importers (including importers of conventional products) are likely to enter the sugar business due to the attractive market prognosis. Since conventional importers can obtain a higher quota allocation due to the greater quantities they can trade overall, a significant increase in competition can be expected between large conventional importers and the smaller importers of natural foods.

The import of sugar is subject to quotas (regardless of whether it is from organic or conventional production). Furthermore, relatively high import duties are charged since imported organic sugar is competing with conventionally produced Swiss sugar.

Problems and wishes of market operators

- Now as in the past, the market for imported organic sugar suffers from deficiencies in quality, shortages and fluctuations in availability. Swiss importers want greater continuity of supply and an improvement in quality. For the next few years it has been suggested that European advisors should help to coordinate production and marketing in the countries of supply.
- Foreign producers are critical of the high costs arising from multiple certification and hope for a simplification of the certification process.

3.2.12 Honey

Market situation and potential

At present no certified organic honey is produced in Switzerland. Organic honey in Switzerland is mostly produced by hobby bee-keepers who sell it privately; very few supply it to stores etc. Greater amounts of organic honey are in demand from the processing industry and smaller amounts from natural food outlets. For the supermarket chains, organic honey is still a relatively new concept but their entry is as good as certain and will clearly stimulate the market. Accordingly potential is good for the next few years. An annual increase of 15–20% is expected.

Significance and sources of imports

BIO SUISSE did not regulate organic honey production in Switzerland until 2003. Therefore only honey from other provinces could gain BIO SUISSE certification. Organic honey is 100% imported and comes from Nicaragua, France and Argentina. For 2004, BIO SUISSE announced the inclusion of organic honey production in their standards. Therefore, Swiss production of organic honey is expected to rise significantly. Growth of Swiss organic honey production will depend to a large extent on the certification costs too.

Policy and trade environment

Various countries in Latin America have begun producing organic honey very recently or will commence production soon.

Problems and wishes of market operators

- Domestic and foreign producers want BIO SUISSE to begin awarding the Knospe label to honey in the near future.
- Development of organic bee keeping model-farms that would help in the systemisation and the standardisation processes.

3.2.13 Coffee

Market situation and potential

The sustainable coffee market (organic and Fair Trade) in Switzerland has many years of history, thanks to initiatives of some roasters and thanks to Max Havelaar who successfully promoted sustainable coffee during the last decade. The Swiss sustainable coffee market is already in a mature state. The market share of sustainable coffee in Switzerland was 3.5% in 2001 (5.5% in retail-market), one of the highest market shares in Europe. In comparison to the small size of the country, a relatively large number of companies are involved in the sustainable coffee business. However, now the number is increasing slowly.

Most organic coffees in the Swiss market are doubly certified with Organic and Fair Trade labels and therefore organic coffees without Fair Trade labels practically do not exist on the Swiss market. Organic coffee makes up for about 25% of all sustainable coffee. Actually, there is a clear shift from Fair Trade to doubly certified Fair Trade and organic coffee. Especially the large supermarket-chains now demand more and more doubly certified sustainable coffee. The Swiss sustainable coffee market grew constantly until the year 2000 (total 1700 t). Growth opportunities for sustainable coffee in Switzerland will be rather modest for the next 2–5 years.

The Swiss are frequent coffee drinkers. Preferred coffees are light-ones, often consumed as milk-coffee. These are mostly 100% arabicas. However, robustas are increasingly used for the growing espresso-market. Some of the presently available sustainable coffees are also blends. Sustainable coffee in Switzerland is generally considered high quality coffee, i.e. coffee in the upper segment of the product range. 74% of the sustainable coffee (990 t roasted coffee) is sold through the supermarket chains Coop, Migros, Manor and VOLG. Main growth is expected in the supermarket channel as well as in the institutional and out of home channels. The specialised retail channel (speciality coffee shops, fair trade and world shops, organic food stores) has lesser growth prospects.

Significance and sources of imports
For climatic reasons, 100% of organic coffee is imported into Switzerland. Fair Trade and organic coffees for the Swiss market are being imported in decreasing order of importance from: Mexico, Colombia. Venezuela, Guatemala, Congo, Nicaragua, Peru, Bolivia, Costa Rica, Honduras, Paraguay and Tanzania.
There are some projects to import organic (not Fair Trade) coffee also from other provinces.

Policy and trade environment
Mexico is the undisputed leader in organic coffee and very well established in Switzerland. But the positive image of organic coffee in Switzerland also facilitates the access of other countries to the Swiss market. This may heighten competition.

Problems and wishes of market operators
Swiss importers, roasters and traders see the following key constraints in the expansion of sustainable coffee:

- Retention of quality is extremely important. Most of the importers laud the quality of the available organic coffee but point out that further improvement can still be achieved.
- Reliability in all its facets is considered of high to very high importance. Some of the importers have had bad experiences with suppliers of sustainable coffee. Contracted volumes were not respected, delivery dates were not met and certificates were not presented in time etc.
- Price is considered important, but not exclusively so. Quality is much more important than price. Growers should therefore realise, that their product in Switzerland is considered a top of the line product. The quality conscious Swiss are willing to pay considerably more for a product of good quality. This characteristic is decisive for strategic planning by producers, processors, traders and retailers.
- Clarity between the different types of certification and standards is considered important for both Fair Trade and organic produce. Organic standards are secured in European legislation but the Fair Trade Standards are not.

3.2.14 Cocoa

Market situation and potential
In the early days of the organic movement (1990–1995), certified organic chocolate was produced by small and sometimes new companies with focus on a niche, and the products were sold primarily in health-food stores or speciality shops. Today, supermarkets also sell these specialised products, but production is still dominated by relatively small and medium-sized chocolate manufacturers with unique brands. Some of them have added other labels to their products in compliance with other sustainability criteria e.g. Fair Trade. Most of the large and traditional manufacturers of well-known branded products in Europe (e.g. Cadbury and Nestle, just to mention a few) are not yet in the organic niche or are only just about to make their entry.

Cocoa plays an important role in the processing industry. The bulk of imported cocoa goes from processing firms via wholesalers to the organic food trade and Third World shops. Although supermarkets have sold little organic chocolate so far, there is considerable interest. The market for organic cocoa has developed very well to date. Annual market growth in the last three years reached 10–15%. Since Swiss organic chocolate can be exported, and interest from the large supermarkets in organic chocolate is also set to increase, significant sales growth is likely in future (5–10% annually).

Significance and sources of imports
100% of Switzerland's organic cocoa is imported. The main source countries are the Dominican Republic, Bolivia and Madagascar. New sources of organic cocoa for Switzerland from Latin America are in preparation.

Policy and trade environment
The prospects for export make Switzerland an interesting country for organic chocolate. The quality and reputation of Swiss chocolate have a positive effect on the national and international demand for organic chocolate.

Problems and wishes of market operators

One important question for cocoa producers is, how to meet the requirements of the international market and the importer. Swiss cocoa importers give the following answers to these questions:

- From the European importers' point of view, lack of quality and lack of continuity are the main obstacles. They would like the supply to expand. This would also help to even out fluctuations in harvest, such as those resulting from natural disasters.
- Producers, traders and European importers mention that it is necessary to reduce the workload for certification and label schemes and to harmonise the standards. For example a situation can arise whereby the same chocolate that is sold in the EU as a completely organic product can only be certified as produce under conversion in Switzerland. Therefore Swiss importers often bring in the goods via an EU country. This rather unreasonable diversion can be prevented and the produce directly imported into Switzerland as fully organic.
- Government bodies in the countries of export want to see administrative procedures in the importing countries simplified.

3.2.15 Seeds, Seedlings and ornamental plants

Market situation and potential

Switzerland has nearly no organic seed production except for cereals and potatoes and most of the agricultural and garden- ornamental seeds are imported even though the market is quite large. For some years the agricultural standards have stipulated that even the seedlings used in agriculture must be produced to organic standards. This requirement has brought an interesting market into being and stimulated domestic cultivation. The market for imported seedlings has developed dynamically in recent years (annual sales growth of 10–15%). About 12 companies in Switzerland are now producing organic seedlings. The main buyers are organic vegetable producers. In future the two most important wholesale distributors will also offer seedlings from abroad. As the market matures, the boom may well begin to tail off. The market for ornamental plants is developing on a similar scale.

Significance and sources of imports

While ornamental plants are almost exclusively produced in Switzerland and, apart from a few trial promotions, no market for foreign plants has developed; imports of seedlings take place mainly from the Netherlands and for seeds from the Netherlands, Germany and France. The countries supplying organic ornamental plants are the Netherlands, Italy and Germany. Domestic production is constantly rising. In the medium term the demand for imports will focus on specialities.

Policy and trade environment

Rising domestic production will force out the imports step by step. There will always be demand for specialities such as grafted tomatoes from abroad.

Problems and wishes of market operators

- The main problems from the trader's point of view are the regulations on seeds and seedlings under both national legislation and BIO SUISSE standards. The obligation to use organic seedlings despite the shortage of supply has driven prices to excessive levels. The standards for seeds are also very high which include seed health and vigour.
- The industry wants the Swiss authorities to make the authorisation process easier (certificate for the entire production series and not for every delivery).
- The trader wants BIO SUISSE to issue clear directions on which requirements are essential and which are optional.

3.2.16 Textiles

Market situation and potential

Textiles made from organic cotton are very much in demand in Switzerland thanks to several yarn traders like Remei and retailers like COOP. The aim is to manufacture all cotton products exclusively from organically produced cotton. In the past few years, annual sales growth of 45% has been achieved. The potential is excellent. Growth should only weaken slightly to around 30% per year in the next few years.

Significance and sources of imports
100% of organic cotton is imported and comes primarily from India, Turkey, Egypt and Tanzania. Processing takes place in Switzerland, India, Germany, Greece, Portugal, Lithuania, Croatia and other countries.

Policy and trade environment
BIO SUISSE does not award the Knospe label to textiles. The environment for the import of organic cotton into Switzerland is very good however and is virtually unaffected by administrative barriers.

Problems and wishes of market operators
The stipulations regarding processing are still somewhat varied. The international association of the natural textile industry (Internationaler Verband der Naturtextilwirtschaft e.V, IVN) has attempted to harmonize standards by uniting manufacturers, traders and exporters in a two-level label system and an associated quality control process consisting of factory and product inspections.

3.2.17 Milk and dairy products

Market situation and potential
During the last five years the demand for organic milk has grown faster than the supply development. However, the recent large conversion of dairy farms and a decelerated supply in some regions developed in these regions a situation of oversupply. This led the organic dairy producers organisations in Switzerland to co-ordinate the supply development and steer the produced organic milk properly. In the last few years the demand for organic milk increased by 10–20% annually and steadily. In the next few years an annual growth of organic milk supply of 5–10% is expected. Organic milk products in Switzerland are quite popular with the consumers. In 2002 nearly 10% of the consumed milk was organically produced, it had a market share of 9% and cheese and yoghurt had a market share between 3–4%.

Significance and sources of imports
Based on the bilateral agreements between Switzerland and the EU with regard to the international trade activities only import of organic cheese is allowed in Switzerland. There is really no import of organic milk or milk products. Also in the future only certain types of internationally

famous organic cheese from France and Italy will have a chance to be imported. The volume of the demand for imported cheese strongly depends on the activities of the retail chains COOP and Migros in the future. Only certain international specialities like Parmesan have good chances to get imported.
Imported products have only been found in natural food stores until now. Organic cheese is mainly imported from France and to some extent from Italy. Import of meat and meat products is so far insignificant and not really expected to rise in the near future.

Policy and trade environment
The government based restrictions on the importation of milk and milk products and the protection of BIO SUISSE for the domestic dairy farmers in a presently sensitive market situation would clearly restrict imports.

Problems and wishes of market operators
Foreign producers and traders want BIO SUISSE to award the Knospe label to more products including cheese and other dairy products in future.

4. Requirements and conditions relating to access for organic imports

4.1 Customs regulations and value-added tax

For organic products the **general customs tariffs** and regulations apply. High customs duties are levied on a range of agricultural products such as sugar, vegetable oils and dairy products. For some products special import licences are also necessary which are only granted to Swiss importers. Higher customs duties are levied on processed products than on raw materials. For the import of meat and fish products, sanitary certificates are also required. Further details are contained in the Swiss Ordinance on agricultural imports *(Schweizerische Agrareinfuhrverordnung, SR 916.01).*
As in the EU, **preferential customs duties** may be applied to imports of certain agricultural products from emerging markets and markets in transition in accordance with the Swiss tariff preferences system (Generalized System of Preferences), and these are lower than the tariffs generally applicable (SR 946.39) (see www.admin.ch/ch/d/sr/94.html). Imports from Least Developed Countries are exempted from customs duties for the majority of headings in the customs tariffs. A complete and up-to-date list of customs tariffs may be obtained on request from the Swiss Federal Customs Administration *(Eidgenössische Zollverwaltung) (see www.afd.admin.ch/d/firmen/import/zolltarif.php).*
Importers pay a **value-added tax** of 2.4% on foodstuffs that they bring into Switzerland. The VAT rate is the same for both imported goods and those produced in Switzerland.

4.2 Requirements laid down in the legislation on food

Both organically and conventionally-produced foods, irrespective of whether or not they are imported, are subject to Swiss laws and ordinances relating to foodstuffs (see web information corner at the end of this chapter):

- The **Food Act** (*Lebensmittelgesetz* SR 817.0) and the **Ordinance on food** (*Lebensmittelverordnung* SR 817.02): these form the cornerstone of food legislation in Switzerland.
- **Ordinance on foreign substances and constituents in foods** (*Verordnung über Fremd- und Inhaltstoffe in Lebensmitteln*, short name: *Fremd- und Inhaltstoffverordnung* SR 817.021.23): lays down the maximum permissible concentrations of plant protection products and growth regulators, heavy metals, pharmacological substances, microbial toxins, radionuclides, nitrates and nitrites, etc.
- **Ordinance on additives permissible in foodstuffs** (*Verordnung über die in Lebensmitteln zulässigen Zusatzstoffe*, short name: *Zusatzstoffverordnung* SR 817.021.22): contains a list of substances and preparations that are positively permitted and a list of the applications of different additives together with their maximum permissible amounts; it also regulates the declaration of additives.
- **Ordinance on hygiene and microbiological requirements relating to foodstuffs, objects in contact with foodstuffs, workrooms and staff** (*Verordnung über die hygienisch-mikrobiologischen Anforderungen an Lebensmittel, Gebrauchsgegenstände, Räume und Personal*, short name: *Hygieneverordnung* SR 817.051): lays down tolerance levels for micro-organisms in foodstuffs and drinking water.
- **Ordinance on nutritional value** (*Nährwertverordnung* SR 817.021.55): regulates labelling relating to food nutrition (indications of energy values and nutritional content).
- **Ordinance on indication of country of origin of foodstuffs, ingredients and raw materials used in foodstuffs** (*Verordnung über die Angabe des Produktionslandes von Lebensmitteln, Lebensmittelzutaten und Rohstoffen*, short name: *Rohstoffdeklarationsverordnung* SR 817.021.51): stipulates that the country of origin of individual raw materials in a food product must be indicated as well as that of the food product itself.
- **Ordinance on the measurement and declaration of quantities relating to goods for trade and transportation purposes** (*Verordnung über das Abmessen und die Mengendeklaration von Waren in Handel und Verkehr*, short name: *Deklarationsverordnung* SR 941.281): regulates indications of quantity (weight, volume, etc.) relating to foodstuffs and the corresponding declarations both for foodstuffs that are sold loose and those sold in pre-packaged form.

These ordinances relate mainly to foodstuffs packaged for the consumer and are not directly relevant to bulk imports. Exporters should nevertheless take these requirements into consideration since the final products processed from imported raw materials must comply with them.

4.3 The Swiss Organic Farming Ordinance

Swiss organic products must comply with the requirements set out in the Swiss Organic Farming Ordinance. This also includes compliance with:

- Documentation of ecological services (*Ökologischer Leistungsnachweis*, SR 910.13) (a prerequisite for direct payments)
- Ordinance on animal protection (*Tierschutzverordnung* SR 455, 455.1)
- Ordinance on protection of water resources and the aquatic environment (*Gewässerschutzverordnung* SR 814.2, 814.201)
- Ordinance on outdoor access for livestock (*RAUS-Verordnung* SR 910.132.5)

Imported organic products must conform to equivalent conditions.
In addition, the Ordinance on direct payments in agriculture (*Verordnung über die Direktzahlungen in der Landwirtschaft* SR 910.13) also contains provisions relating to organic farming. It forms the basis for the disbursal of ecologically motivated direct payments in Switzerland and is an expression of the Swiss agricultural policy objective to promote organic farming. It is not relevant, however, for foreign producers and trading companies.

4.3.1 Objectives of the Organic Farming Ordinance

The Swiss Ordinance on organic farming and the labelling of organically produced products and foodstuffs (termed in the following Organic Farming Ordinance; *Verordnung über die biologische Landwirtschaft und die Kennzeichnung biologisch produzierter Erzeugnisse und Lebensmittel,* short name: Bio-Verordnung SR 910.18 and 910.181) came into force on January 1, 1998 and is based on Article 18 of the Agriculture Act (*Landwirtschaftsgesetz* SR 910.1). It lays down the basic requirements that a product must fulfil in order to be designated "organic". This is intended to protect organic products from abuses and improve market transparency. Organic products must comply with strict requirements concerning production and processing and be subject to inspection by a competent and independent inspection body. The state acts in a supervisory capacity as regards inspection.

Important amendments of the Swiss Organic Farming Ordinance:

- From 1st of January 2001, animal products (production, processing and trade) are regulated by the Organic Farming Ordinance. This is equivalent to the EU-regulation 1788/2001.
- 2004 onwards, the labelling and inspection of organic fodder will be regulated.

4.3.2 Scope and labelling

The Swiss Organic Farming Ordinance is applicable to the same products as EU Regulation No. 2092/91 on Organic Production:

- Unprocessed agricultural crop, animal breeding and animal products.
- Processed agricultural crop and animal products intended for human consumption, composed essentially of ingredients of plant or animal origin.
- Feed material and fodder for animal breeding.

The Ordinance on Organic Farming is not applied to aquaculture and its products. For these products, the Swiss Federal Office for Agriculture does not provide individual authorisations (see chapter 4.3.6).

Agricultural products may only be labelled as organic products if they comply with the provisions of the Organic Farming Ordinance. The following terms or their usual derivatives (such as bio, eco) are protected under Swiss law (for other languages see the EU Regulation, which stipulates "organic" for English, for example):

- German: "biologisch", "ökologisch"
- French: "biologique"
- Italian: "biologico"

Labelling remains voluntary. Where products are labelled as organic, however, they must conform to the relevant provisions of the Organic Farming Ordinance. In Switzerland at present there is no government label for organic products, but there are various private labelling schemes.

4.3.3 How the Swiss Ordinance compares to the BIO SUISSE Standards

Most of the private labelling schemes both in Switzerland and in the EU go further than the minimum requirements of the Swiss Organic Farming Ordinance and the EU Regulation on Organic Production. Before the Swiss Organic Farming Ordinance came into force, the standards that were applied to the production and marketing of organic products were primarily those set out by BIO SUISSE. Producers and traders that have been certified as conforming to the BIO SUISSE Standards may identify their products using the *Knospe* ("bud") label after signing a contract with BIO SUISSE.

4.3.4 How the Swiss Ordinance compares to the EU Regulation on Organic Production

The Swiss Organic Farming Ordinance was modelled on EU Regulation No. 2092/91on Organic Production. In addition, various amendments have been made to the Swiss Ordinance to bring it into line with EU Regulation No. 2092/91.

The Swiss Organic Farming Ordinance is stricter than the EU Regulation on Organic Production in requiring conversion of the whole farm to organic management (see Table 3 and, for more detail, Annex III). Its requirements relating to the conversion process, on the other hand, are less strict than the EU Regulation: in Switzerland there is no "year zero" (conversion-label applies only after 12 months). As a result, conversion normally takes two years rather than three as in the EU.

4.3.5 Reciprocal recognition of organic imports, Switzerland-EU

If a product has been approved in accordance with EU Regulation No. 2092/91 on Organic Production, then it can be approved automatically as organic in Switzerland too, and vice versa. The terms of the WTO/GATT treaties and the bilateral treaties between Switzerland and the EU stipulate that barriers to trade must not be allowed to come into being. Since 1st of June 2003, the bilateral agricultural agreement between Switzerland and the European Union came into force. It states that the organic regulations for both parties are equivalent. Exceptions ought to be mentioned in annex 9 (so far only Swiss products in conversion are mentioned).

The additional conditions imposed by the Swiss Ordinance compared to the EU Regulation are therefore not applicable to imports into Switzerland from the EU. In order to comply with the requirements of private labelling schemes, however, conditions such as whole-farm conversion and other additional conditions may be imposed on imports from abroad, i.e. also on those from the EU.

Elements of reciprocal recognition:

- EU organic products are also considered organic products in Switzerland. The same applies also to organic goods that have been certified in Switzerland as conforming to the Swiss Organic Farming Ordinance. Such products may be exported to the EU without any problem if they have an import certificate and the appropriate labelling (code number or name of inspection body, and the indication "bio" (organic), or a private organic label).
- The list of countries in Annex 4 of the Swiss Organic Farming Ordinance 910.18 (termed in the following the "Country List") is analogous to the EU third countries list in the annex to the EU Regulation.
- With regard to the accredited certification bodies, the Swiss Organic Farming Ordinance refers to the EU Regulation on Organic Production, thereby acknowledging all the inspection bodies or authorities published in the Official Journal of the EU.
- The time limit for recognition by EU Member States conforms to that accorded to Switzerland under EU Regulation 94/92.

Points for importers to note concerning Switzerland:

- The exporter in the EU must apply for an import certificate from his inspection body and ensure that the product bears the code number and name of the inspection body and that it is labelled “bio” (organic).
- Organic imports into the EU that are later exported again to Switzerland must have all duty paid before they leave the EU and must be certified as organic products conforming to the EU Regulation on Organic Production.
- An exception is made to the principle of reciprocal recognition in the case of products from farms in the process of conversion. When a conversion product from the EU, or another country, is imported into Switzerland, this must be specifically declared. They must also bear a conversion label, stating "product under conversion to organic farming". Such products must not give the impression that they originate from completely converted farms.
- Due to the differing requirements pertaining to conversion labelling, conversion products exported from Switzerland into the EU must be sold in the EU as conventional products. In Switzerland only 4 months must have elapsed from the start of conversion (after which conversion products may use the conversion label) rather than 12 months as in the EU. Furthermore, the EU does not permit conversion products composed of several agricultural ingredients to use the conversion label.
- Presently the Equivalence of bee products is under negotiation. From 2004, organic bee products are proposed to be mentioned in annex 9 of the bilateral agricultural agreement, so that these products could be traded between Switzerland and the European Union.

4.3.6 Import requirements

Organic products from the EU that are labelled as such in accordance with EU Regulation No. 2092/91 on Organic Production may be recognized as organic products in Switzerland (see 4.3.5). Imports of products from countries outside the EU into Switzerland (and also into the EU) are regulated by means of equivalence requirements: production, inspection and certification, and labelling of organic products in emerging markets and markets in transition must conform to conditions that are equivalent to those contained in the Swiss Organic Farming Ordinance.

Inspection and certification
In order for an imported product to be marketed as “organic” (*“biologisch”* or *“ökologisch”*) in Switzerland the producers, processors and exporters in the country of origin and the importers in Switzerland must be certified by an accredited inspection body at least once per year. For this they must enter into a contract with an accredited inspection and certification body. In Switzerland the following inspection and certification bodies are accredited at Federal level (addresses are at the end of this chapter and in Annex IV):

- Bio.inspecta
- Institut für Marktökologie (IMO)
- Schweizerische Vereinigung für Qualitäts- und Management Systeme (SQS – Swiss Association for Quality and Management Systems).

Inspection and certification bodies must conform to EN-45011 or ISO-65 standards and obtain accreditation from the Swiss Federal Office of Metrology *(Eidgenössisches Amt für Messwesen)*. List of certification bodies accredited in third countries is to be found in Annex 4 of the Swiss Organic Farming Ordinance (see also the web information corner at the end of this chapter).

Exports from countries on the Country List
Countries where the government imposes conditions on organic products that are equivalent to those applied in Switzerland, and adherence to these conditions is guaranteed, may be included on a **Country List** by the Federal Department of Economic Affairs *(Eidgenössische Volkswirtschaftsdepartement, EVD)* (Annex 4 of the Organic Farming Ordinance). Countries wishing to be included on this

list must submit an application to the Swiss Federal Office for Agriculture (FOAG; *Bundesamt für Landwirtschaft*, BLW) giving details showing that their production regulations and inspection systems are equivalent.

At present, all the EU countries plus Czech Republic, Hungary, Israel, Costa Rica, Argentina, Australia and New Zealand are included on the Swiss Country List. With the expansion of the European Union to the east, the new members would automatically be treated as EU-member states. The updated Country List can be obtained from the Swiss Federal Office for Agriculture or downloaded at the following website:
www.admin.ch/ch/d/sr/910_181/app4.html. Organic imports from these countries are subject to simpler procedures for approval. For such imports the exporter must obtain an import certificate *(Kontrollbescheinigung)* from his certification body in the country of origin (see Annex V). This certificate is presented to the importer in Switzerland. It is required by the certification body when the annual inspection of the business is carried out. Moreover, this document confirms that the imported product is an organic product. However, for meat and meat-products (in which the meat content > 20%) this document would have to be inspected and stamped by the customs veterinarian.
Till the end of 2000, the Swiss Country List related only to organic products of plant origin. Since January 1, 2001 it includes organic products of animal origin (some countries only).

Exports from non-approved countries outside the EU
Analogously to the EU, Switzerland also operates a system of **"individual authorization"**. For direct imports from countries that are not included on the list of third countries, the importer in Switzerland must submit an application for individual authorization to the Federal Office for Agriculture (FOAG) together with an **attestation of equivalence** for the relevant product and its producer (for forms see Annex V). On the basis of these the FOAG can confirm the equivalence of individual products and issue "individual authorisation". Individual authorisations are listed annually in the Swiss official trade gazette (*Schweizerische Handelsamtsblatt*) and can be seen on the internet (http://www.blw.admin.ch/fakten/import/eu_list/bioeinzelermaechtigungen.xls). Only when the individual authorisation has been granted may the product be imported into Switzerland as an organic product. In these cases too, every delivery must be accompanied by an import certificate.

Requirements relating to the attestation of equivalence

- A separate application for individual authorization is required for each exporter in the country of origin. The application may be completed for multiple exporters, however, if they all have their business headquarters in the same country (country of origin) and come under the same certification/inspection body.
- The attestation of equivalence, which must accompany the application for individual authorization, must be completed by the certification/inspection body of the exporter and is the key prerequisite for approval of the application.
- Checklist for assessing equivalence from the Federal Office for Agriculture (see Annex V): the use of genetic engineering and irradiation is prohibited. Equivalence of procedures used is subject to detailed assessment.
- The more thoroughly the accompany documentation has been prepared, the quicker and less complicated it will be to process the application. In the case of applications that place especially great demands on the time and effort of the FOAG, a fee is charged to reflect this. It is advisable to prepare the documents as thoroughly as possible in German, French, Italian or English and, where necessary, draw on the services of a certification body in order to keep the administrative effort, and the corresponding costs, to a minimum.
- Inspection to ascertain whether the importer in Switzerland has the required authorization for all imports is carried out by the Swiss inspection and certification bodies.

Conditions pertaining to import certificates
Every consignment must be accompanied by an import certificate. The certificate serves as confirmation that production requirements have been adhered to and that inspection has taken place. Import certificates are issued by certification/inspection bodies that are accredited at Federal level (and not by the Federal Office for Agriculture):

- In the case of imports into Switzerland from countries on the Country List, the import certificate must be completed by one of the certification bodies for the relevant country stipulated on the Country List. In the case of imports of non-EU products from the EU that already have an import certificate for the EU, this will be accepted as long as the information contained in it is valid at the time of import into Switzerland.
- In the case of imports into Switzerland from countries not included on the Country List (where individual authorization is required), the body named in the application for individual authorization (normally the exporter's certification/inspection body) is responsible for issuing the certificate.

Care should be taken to ensure that the properly completed document, which must have been stamped and signed by the inspection body, is forwarded to the importer in Switzerland without delay. If an importer is unable to produce an import certificate he will be sanctioned accordingly.

4.4 Private organic labelling schemes

4.4.1 The BIO SUISSE *Knospe* ("bud") label

The Association of the Swiss Organic Agriculture Organizations *(Vereinigung Schweizer Biolandbau-Organisationen,* BIO SUISSE) was founded in 1981; it comprises more than 30 member organizations and more than 6000 farmers. In 1981 BIO SUISSE set out the first joint standards for organic cultivation and established the *Knospe* (bud) trademark for products from certified organic production. Nowadays the Knospe is the most widely known organic label amongst consumers in Switzerland.

Knospe ("bud") label for organic products of swiss origin

The BIO SUISSE Bud: more than 90 % of the raw materials come from Switzerland.

For imported products to be awarded the *Knospe* label, all of the foreign operators (producers, processors and traders) must fulfil not only the requirements set out in the Swiss Organic Farming Ordinance, but also comply with BIO SUISSE Standards. Verification of compliance is undertaken by BIO SUISSE. Corresponding applications for inspection must be made by a BIO SUISSE licensee before goods are imported.
It is not only in the field of agriculture that the BIO SUISSE Standards are tougher than the minimum requirements stipulated by Switzerland and the EU (see 4.3.4). In processing, too, certain processes and additives such as synthetic ascorbic acid and alginates are not permitted. For processed products, each constituent product must be approved by BIO SUISSE. Applications may be submitted in writing by BIO SUISSE license holders.

Based on marketing considerations, the BIO SUISSE Standards list the following restrictions applicable to imported goods:

- Transportation by air is not permitted.
- Fresh products from overseas are only approved if, for climatic reasons, these products cannot be grown in Europe (this includes frozen goods).
- In the case of products processed abroad in their entirety and products of animal origin, the management board of BIO SUISSE decides on a case-by-case basis whether the product may be approved.
- Bio Suisse can reject importing organic products from overseas for image reasons (standards Article 6.2.2).

Table 3: Comparison of organic farming regulations and standards: EU, Swiss Organic Farming Ordinance and BIO SUISSE Standards

Area, criteria	EU Regulation No. 2092/91	Swiss Organic Farming Ordinance (BV)	BIO SUISSE Standards
Whole-farm conversion to organic farm management	Not mandatory	Mandatory; however, vineyards and orchards are partly exempted	Mandatory
Conversion period	2 years (perennials 3 years)	2 years	2 years, no retro-perspective approval of parcels and farms
Step by step conversion	Step by step conversion of partial farm units possible	Up to max. 5 years possible in the case of perennial crops	Up to max. 5 years possible in the case of perennial crops
In-conversion label	From 2nd year on	From 1st year on	From 1st year on
Surfaces enhancing biodiversity ("compensatory ecological habitat areas")	No requirement	Required for direct payments; at least 7% of the agricultural farm land	Same as Swiss Organic Farming Ordinance, in addition 5% of all grassland with low input fertilisation and management
Nutrient level	Max. 170 kg/ha (for animal husbandry)	Max. 2.5 LU equiv. [1]/ha in low-land areas (in highland areas lower); balanced nutrient input/output situation	Same as Swiss Organic Ordinance, in addition crop specific maximum amounts of nitrogen and phosphorous are required
Crop rotation	Balanced rotation (not specified)	Maximum proportions for cereals, maize and potatoes in the rotation	Same as Swiss Organic Ordinance, in addition minimum of 20% soil improving crops (lye and/or green manure)
Soil management	Only general rules	Only general rules	Minimum green cover in vineyards and orchards also in arid areas (min. 4 months)
Fertilisers and soil conditioners	Only substances listed in Annex II A	Only substances listed in Annex 2 of the Swiss Organic Ordinance	Additional restrictions: e.g. no use of meat and bone meal.

[1] LU equiv.: Livestock unit equivalent *(DGVE: Düngergrossvieheinheit)*

Documentation required for application for BIO SUISSE approval
In the case of **farms** BIO SUISSE requires:

- a current inspection report and report for the previous year from the farm's inspection body
- a BIO SUISSE checklist (see www.bio-suisse.ch/en/importandexport/accesstoswissmarket.php) completed by an accredited inspection body
- certificates confirming how long the farm has been under organic production
- crop rotation plans, field histories.

In the case of **producer cooperatives and small farm projects** BIO SUISSE requires:

- a comprehensive report on the whole project from the inspection body
- a description of internal inspection mechanisms
- a producer register (including home address, certified and non-certified fields and crops, field history, estimated crop yield; any measures taken, items bought in, pesticides and fertilizer used)
- new businesses, conversion status and leavers (including reason, e.g. infringement of standards)

Use of crop protection agents	Only substances listed in Annex II B	Only substances listed in Annex 2 of the Swiss Organic Ordinance	Additional restrictions:
Limits for copper use as plant protection agent	Max. 8 kg/ha calculated on a 5 year average from 2006 on 6 kg/ha calculated on a 5 year average	max. 4 kg/ha	Different max. amounts/ha, max. 1.5 kg for apple/pears, max 2 kg/ha for berries, max. 4 kg for stone fruits, potatoes and grapes (grapes: average over 5 years)
Metaldehyde against slug and pyrethroid insecticides	Only permitted in traps (until 31 of March 2006)	Prohibited	Prohibited
Animal husbandry	Detailed regulation with regard to imported animals and feed, animal treatment and housing	Detailed regulation like EU	Detailed regulation like EU and additional BIO SUISSE requirements (e.g. for pig keeping and poultry) Special requirement for farms with animals exporting plant products with the BIO SUISSE logo to Switzerland: the general requirements for animal husbandry of IFOAM Basic Standards or EU regulation have to be fulfilled at least.
Processing	No irradiation Only Annex list of additives and processing aids for processing of plant products	No irradiation Annex list of additives and processing aids for processing of plant and animal products	No irradiation or microwave treatment; only quality-preserving methods permitted, less additives allowed (no synthetic ascorbic acid)
Genetically modified organisms and products derived from them	Prohibited	Prohibited	Prohibited
Packaging	No regulation	No regulation	Some restrictions (aluminium cans, PVC, etc.)

- documentation relating to inspection visits
- quantities bought up from each producer (day-book, delivery notes).

Trade and export firms must be able to provide evidence that they guarantee separate handling of BIO SUISSE-approved goods. BIO SUISSE requires the following documents in order to check this:

- current inspection report from the inspection body
- certificate for the business
- description of separate handling and quality assurance system.
- pest and disease management.

Knospe ("bud") label for imported organic products

The Bio-Bud: more than 10 % of raw materials are imported. They are liable to equivalent standards.

In the case of **processing firms** BIO SUISSE requires:

- Only BIO SUISSE-approved raw materials may be used in the production of BIO SUISSE-approved products. For this reason, in addition to the details regarding processing, documentation relating to all producers supplying raw materials must also be submitted.
- current inspection reports on all locations involved in processing
- processing description and process specifications (time, temperature, pressure)
- list of substances used as processing aids and, where relevant, GMO-free certification
- complete processing recipes (expressed in percentages of the whole)
- precise details of packaging materials
- pest and disease management
- designs for planned labels.

The more complete this documentation is, the quicker and cheaper the application for approval can be processed. Not all inspection bodies provide sufficiently detailed inspection reports. BIO SUISSE frequently has to turn down applications on the grounds that the information supplied was inadequate.

Approval procedure

When BIO SUISSE has considered the application, the importer receives written notification while the firm in question (producer, processing firm, exporter) receives in addition to the notification all relevant details for the follow-up approval. The BIO SUISSE approval does not give the firm the right to market the product using the Knospe ("bud") label or name. This right is reserved exclusively for firms that have entered into a special contract with BIO SUISSE, i.e. the BIO SUISSE licensee. The approval procedure must be repeated every year.

The application for BIO SUISSE approval must be made by an importer operating in Switzerland. The importer must be, or must become, a BIO SUISSE licence holder and pay the approval fees and *Knospe* licence fees. For a product to be labelled with the *Knospe* trademark, it must be imported via a BIO SUISSE licence holder.

4.4.2 DEMETER

For a product to carry the biodynamic DEMETER label, it must conform to the production and processing standards laid down by the Swiss DEMETER Association. This also applies to DEMETER imported goods.

DEMETER standards cover all of the requirements laid down by BIO SUISSE. In some respects, however, they go further than these (see DEMETER standards www.demeter.net):

- Use of biodynamic preparations. These preparations are aimed at stimulating soil fertility by revitalising the soil and stimulating activity in plants.
- No copper products to be used in the cultivation of vegetables and potatoes.
- Landscaping of the farm. Every farm should provide good living conditions for beneficial organisms.
- Only feeds of biodynamic origin and max. 20% of brought in organic origin. No feeds of conventional origin may be brought in.
- Special requirements apply with regard to processing.

For DEMETER imported goods, the following rules must be observed:

- Air transport of goods is not permitted. Exceptions can be only asked for highly perishable tropical fruits from biodynamic projects in developing countries. Decisions are made by the DEMETER commission for protection of proprietary rights (DEMETER Markenschutzkommission).
- DEMETER products from farms under conversion may only be imported into Switzerland if the farm has been 100% certified by the EU. Such products may then be brought onto the Swiss market with the declaration "under conversion to DEMETER".

- The imported product is only recognised as a DEMETER product in Switzerland if it has been certified by one of the 19 member countries of DEMETER International or by the International Demeter Certification Body (Prüfstelle) in Darmstadt, Germany; www.demeter.net.

4.4.3 Migros organic programme (Bio Programm der Migros)

The Migros label is an organic label with growing importance in Switzerland. Under this label Migros commits itself to the quality of organic products sold in its outlets. The detailed requirements include social, ecological and qualitative criteria. The processing complies with the provisions of the Swiss Organic Ordinance. In domestic production the same requirements apply as for BIO SUISSE directives. Imported products with the Migros bio label correspond to the European regulations. Air transport is not accepted. No biological products are imported from conversion firms. Before a supplier can offer bio products through Migros' channels, he undertakes to comply with the Migros bio directives. In addition he must have each product approved. After thorough examination he receives the product certificate.

4.4.4 Requirements under other labelling schemes for exports to Europe

BIO SUISSE works closely with other labelling organisations that set equivalent standards. These include the German organisations Naturland, Bioland and Demeter Deutschland and the Austrian Ernte-Verband. All of these organisations include whole-farm conversion as a requirement.

Naturland and BIO SUISSE cooperate in a special way: BIO SUISSE operates a special approval procedure for projects outside Germany that have been certified by Naturland. In addition to Naturland certification, Naturland can also verify compliance with the BIO SUISSE Standards if so requested. Definitive approval, however, can only be granted by BIO SUISSE, since general Swiss federal legal provisions relating to organic products must also be complied with. BIO SUISSE, on the other hand, does not verify whether projects or businesses comply with the standards set by Naturland.

In recent years BIO SUISSE has begun to collaborate more closely with the following inspection and certification bodies abroad: Ecocert (France), AIAB (Italy), SKAL (Netherlands), KRAV (Sweden) and FVO (USA). These can, on request, include the specific requirements laid down by BIO SUISSE when carrying out their inspection. This takes place either by completing a special BIO SUISSE checklist or by integrating the relevant points into their own standards (for addresses see Annex IV).

4.4.5 Relationship to Fair Trade

Many producer associations in the emerging markets and markets in transition conform to the requirements of the Fair Trade organisations, e.g. FLO (Fair-trade Labelling Organisations International), Transfair, Max Havelaar and World Shops (Weltläden). Having a Fair Trade label does not necessarily mean, however, that the products can also be sold as "organic". In order to be designated organic, the project must be subject to accredited organic inspection procedures.

BIO SUISSE maintains close contacts with Max Havelaar Switzerland, since some projects conform to the standards of both organisations. The combination of "organic" and "fair trade" labelling can enhance a product's market prospects.

Web information corner on requirements and conditions relating to access for organic imports into Switzerland

http://www.blw.admin.ch/
The website of the Swiss Federal Office for Agriculture provides detailed information on:
- The Swiss Organic Farming Ordinance
- Forms for attestation of equivalence and individual authorization to import
- Direct payments for organic farms
- Cultivation of organic products.

http://www.blw.admin.ch/themen/aw/bio/e/index.htm#import
Documents for import of organic products (forms, explanations, regulations, information) in English

http://www.admin.ch/
Original texts of:
- Swiss legislation
- The Swiss Ordinance on agricultural imports.

http://www.zoll.admin.ch
Customs tariffs of the Federal Customs Administration.

http://www.iso.ch/
The homepage of the International Organization for Standardization (ISO) in Geneva provides a link to ISO-65, the standard pertaining to certification bodies.

http://www.cenorm.be/
The homepage of the European Committee for Standardization (CEN) provides a link to the text of the EN-45011 standard.

http://www.bio-inspecta.ch/
Services provided by the inspection and certification company bio.inspecta.

http://www.imo.ch
Services provided by the inspection and certification company “Institut für Marktökologie” (IMO).

http://www.sgs.ch
Services provided by the inspection and certification company SGS (Société Générale de Surveillance).

http://www.sqs.ch
Services provided by the inspection and certification company Swiss Association for Quality and Management Systems (SQS).

http://www.sas.admin.ch
The Swiss Federal Office of Metrology is the accreditation body for inspection and certification bodies in Switzerland.

http://www.bio-suisse.ch
The website of BIO SUISSE (Association of Swiss Organic Agriculture Organizations, Vereinigung Schweizer Biolandbau-Organisationen) provides detailed information on:
- Standards relating to farming and processing
- Approval procedures for the Knospe (“bud”) label
- Markets and prices
- Addresses of licence holders

http://www.maxhavelaar.ch/
The website of Max Havelaar Switzerland, one of the most important Fair Trade organizations.

http://www.demeter.ch and http://www.demeter.net
The website of DEMETER Switzerland and the website of DEMETER International provide information on:
- Standards relating to farming and processing
- Approval procedures for the DEMETER label.

http://www.miosphere.ch/d/produkte/labels.php3
Overview of the different labels from Migros and the standards concerning the processing and trade of Migros' organic products.

5. Services for organic agriculture

5.1 International cooperation by FiBL

FiBL: More than 30 years of experience

FiBL was established as a foundation in 1974 by organic farmers, scientists and politicians. Since 1997 the institute's headquarters have been in Frick in Switzerland. The objective of the Research Institute of Organic Agriculture (FiBL) is to contribute to the development and improvement of organic and sustainable agricultural practice. FiBL meets this objective through:

- Practice-oriented agronomic and economic research, by which FiBL improves the understanding of organic farming systems and of the environmental, economic and social impact of farming.
- High quality extension service, by which FiBL makes the latest organic farming methods easily accessible to farming communities, national and private extension services and other education centres throughout the world and services the needs of these communities in different forums.

FiBL-Projects and Services

FiBL implements projects with agronomic, ecological, socio-economic and cultural objectives, on behalf of various partners and customers:

- Farmers and farmer-co-operatives
- Traders and processors
- Public and private sector research
- Educational and advisory institutions
- Development cooperation agencies and NGOs
- Public authorities and bodies.

FiBL projects and services address all issues relating to the production, processing and marketing of organic products:

- Feasibility and project studies
- Conversion planning and preparation of initial inspection
- Training and advice (production techniques, economics, marketing and ecological aspects)
- Documentation, e.g. IFOAM / FiBL Training Manuals, technical leaflets
- Research and development, pilot and demonstration trials
- Development of processing and marketing (market surveys, marketing concepts and organic produce sourcing).
- Preparation of documents for import authorities and label certification
- Set-up of inspection and certification programmes, e.g. in India, Bulgaria, Rumania, Indonesia, China.

The International Cooperation group at FiBL is a motivated team of experienced organic advisers. They are intimately acquainted with organic farming and its institutional and commercial environment, and have wide-ranging experience in international cooperation. The pool of FiBL-consultants includes experts for Western and Eastern Europe, the Mediterranean region, Africa, Latin America and Asia.

Local Initiative and Local Ownership
Innovations such as organic farming will only then have sustained success if a general consensus legitimises them. FiBL seeks this consensus and the shared responsibility engendered by it at every possible level. The desire to find ecologically and economically sustainable solutions must be rooted in the region or country itself. FiBL-projects are based on local initiatives, local ownership and local knowledge.

While cultivation techniques and successful marketing are crucial, FiBL-projects further embrace development policy objectives and fair trade aspects, knowledge and promote the refinement and dissemination of this knowledge.

Support from Production to Sale
The organic market is highly specific and dynamic and constant alertness is required. At the same time it is a market with tremendous prospects for growth and it offers creative producers and exporters some excellent opportunities for success.

In step with the growing opportunities for trade links and commodity marketing, the requirements placed upon the credibility and quality assurance of organic produce are also rising. Competent project support – from production through processing to the final sales outlet – is thus becoming all the more important. FiBL offers full chain-of-custody surveillance and help to establish and implement traceability and certification.

5.2 Research

In Switzerland there are six state-run agricultural research stations. Some of their research projects deal with issues relating to organic farming, in particular those of the Swiss Federal Research Station for Agroecology and Agriculture *(Eidgenössische Forschungsanstalt für Agrarökologie und Landbau, FAL)* in Zürich-Reckenholz.

Research at FiBL uses on the following key areas: environmentally friendly crop production, organic plant protection, landscape ecology, business management in organic farming, species-appropriate livestock management and breeding, complementary veterinary treatments and food quality. FiBL also has an experimental site in Therwil (Basel), a 30-hectare agricultural enterprise in Frick (Aargau), a network of 60 pilot farms and other opportunities for conducting experiments on numerous working farms throughout Switzerland. The institute has gained international renown above all for its DOK experiment comparing conventional and organic methods of farming, which has been running for 25 years, and also through its continuing work on organic farming standards within IFOAM, the International Federation of Organic Agriculture Movements.

The oldest establishment for biodynamic research is the Goetheanum in Dornach. Its Research Working Group *(Arbeitsgruppe Forschung, AGF)* co-ordinates all research on biodynamic agriculture in Switzerland. Every year the Goetheanum organises an international conference on agriculture.

5.3 Advisory services, training and documentation

One of FiBL's most important tasks is to bring expertise and new research findings to producers. Spread across Switzerland, FiBL has four regional advisory bureaux. FiBL's consultants cover a wide range of specialized areas, such as animal health, poultry management, vegetable production, viticulture and fruit-growing. The official advisory services run by the Cantons also offer specialist advice on organic farming, focussing particularly on advice relating to conversion. In Switzerland there are more than 30 agricultural colleges offering a wide range of courses and study programmes relating to organic farming. All the Swiss Cantons run obligatory introductory courses in accordance with BIO SUISSE requirements, which stipulate a minimum attendance of two days at

such courses in order to obtain initial certification. To complement the advisory services offered by the Cantons, FiBL runs numerous courses, seminars and field inspections for interested farmers in conjunction with the regional organic agriculture organizations.

A group of practitioners, teachers of agriculture and experts from FiBL have developed a curriculum for basic training in organic farming. Various agricultural colleges and farmers' enterprises now offer training courses and traineeships based on this curriculum. Some colleges already offer an officially recognized qualification with the title "Farmer specialized in organic agriculture" *(Landwirt mit Spezialrichtung Biolandbau).* In the case of biodynamic agriculture, a four-year training course has been in existence for many years. The courses and practical placements that are part of this training programme take place at agricultural enterprises. An overview of all the courses and training opportunities relating to organic farming and traineeships on organic farms is available on FiBL's homepage.

The Department of Agriculture at the Swiss Federal Institute of Technology *(Eidgenössische Technische Hochschule, ETH)* in Zürich offers a degree course in agroecology which covers organic farming methods. A similar programme is also offered by the Swiss College of Agriculture (*Schweizerische Hochschule für Landwirtschaft, SHL)* in Zollikofen.

"bio aktuell", the information bulletin for organic farmers, is published jointly by FiBL and BIO SUISSE. "bio aktuell" provides monthly information on current issues relating to farming methods, on developments concerning markets, standards and certification, as well as on courses and events. FiBL also publishes an "Organic Farming Dossier" *(Dokumentationspaket Biolandbau),* in which the very latest information on production techniques, business management, training, consultancy and standards in organic agriculture are made available. The dossier contains a collection of information leaflets, a series of transparencies, aids for economic planning, collections of standards and much more besides. With this dossier FiBL provides an ideal tool for advisors on organic farming, teachers of agriculture, agricultural experts and managers.

Web information corner relating to services for organic agriculture

http://www.fibl.org/
The FiBL website provides:
- Information on FiBL's research programme
- A facility for ordering information and documents
- An overview of courses and training opportunities in organic farming
- Exchange for traineeships at organic enterprises
- Downloadable texts and data on organic agriculture
- Information on events
- Contacts and links to both Swiss and international institutions and organizations involved in organic agriculture.

http://www.fiv.ch/
Information on the research programme of the Forschungsinstitut für Vitalqualität (FIV) in Wetzikon.

http://www.goetheanum.ch
Information on the research programme of the Goetheanum in Dornach.

http:// www.sar.admin.ch/en/research/index.htm
The six state-run agricultural research stations with the Overview of agricultural research projects in Switzerland.

http://www.abtvii.ethz.ch
Information on degree courses in Agroecology at the Department of Agriculture and Food Sciences *(Departement Agrar- und Lebensmittelwissenschaften)* at the Swiss Federal Institute of Technology (ETH) in Zürich.

http://www.shl.bfh.ch
Information on degree courses in Agroecology and Regional Planning *(Agrarökologie und Raumplanung)* at the Swiss College of Agriculture (SHL) in Zollikofen.

http://www.ifoam.org
International Federation of organic agriculture movements; useful informations and links.

Part B: The European Union

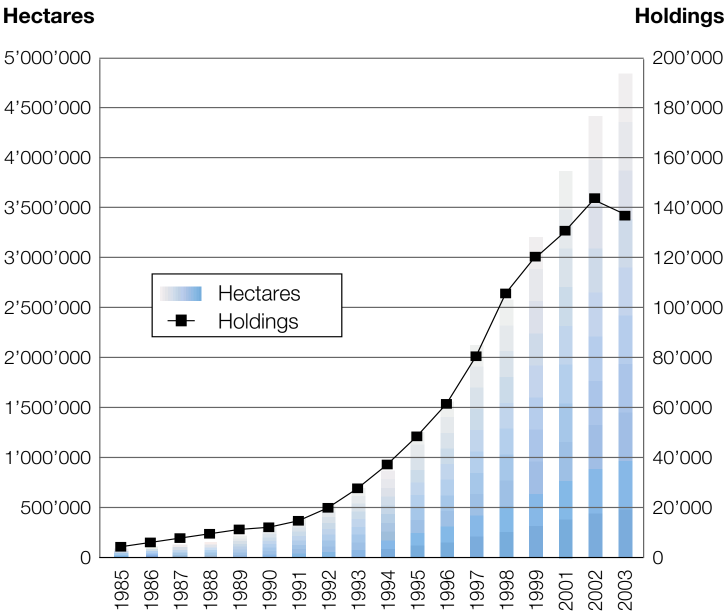
1. The European organic market: Overview

Organic farming is carried on in almost all countries of the world. The share of organic farms in overall farmland and in terms of numbers of holdings is growing continuously. The market for organic products is also growing very rapidly, not only in Europe, North America and Japan, where the largest markets are to be found, but also in many emerging economies and economies in transition. The roots of organic farming, however, lie in Europe. The development that has taken place in the organic market in recent years has thus been driven in Europe by a solid base of producers and consumers who are convinced of the ecological and social benefits of organic methods.

1.1 Development of organic agriculture

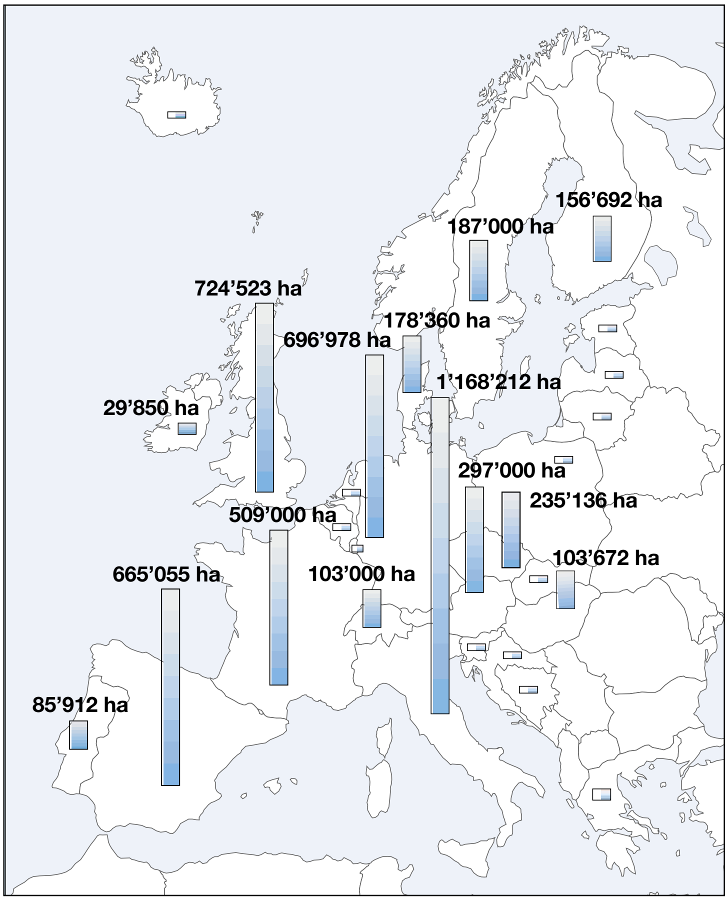
Organic farming has developed very rapidly in almost all European countries since the beginning of the 1990s. The total area under organic farming increased by 16.8% from 2001 to 2002, the front runner being Hungary with a growth rate of 304%, followed by the United Kingdom with a growth rate of 280%, Czech Republic with a growth rate of 200% and Portugal with a growth rate of around 150%. In recent years the total area under organic management in Europe has been increasing by an average of 30% per year. At the beginning of 2003, more than 5,4 million hectares were managed by over 170,000 organic operators in the countries of the EU and EFTA and the 13 accession candidates. This constitutes more than 2% of the total agricultural area.

Figure 7: Development of organic agriculture in Europe



Source: SÖL and FiBL, february 2003

Figure 8: Organic farming in Europe



Source: SÖL, february 2003

There are significant differences among the individual countries as regards the extent of organic agriculture. In Austria more than 10% of all agricultural land is under organic management, while Germany, an important market for selling organic goods, is only in the middle of the field with 4.1%.

From 1987 on some countries (Denmark, Germany, Finland, Norway, Sweden, Austria) introduced subsidies for farm conversion in order to promote organic agriculture. The EU's agri-environment programme introduced under Regulation No. 2078/92 in September 1992 also seeks to promote production processes that protect the environment and promote animal welfare. The type and amount of support provided within this programme varies in the different EU Member States.

1.2 Market development

In many countries the market for organic products is still relatively small, although it is growing everywhere. Worldwide, Europe is the biggest market for organic products. The annual turnover of the organic market in western Europe was around 10 billion US dollars in 2002 and this figure is currently rising by between 0 and 30% depending on the country. In the USA and Japan, the two markets that are next in importance to Europe for organic products, similar market growth rates are expected. Forecasts for the current year put the total sales volume of these three most important markets at 23–25 billion US dollars (with around 6% of this in Switzerland).

Depending on the country and product group, the market share of organic products ranges from less than 1% up to 5%. By the year 2005 the share of organic foods in the overall market in Europe is predicted to reach between 5 and 10%. Within the EU, Germany has the largest market volume in absolute terms. In Denmark, however, organic products have a higher percentage of the total market. Certain product groups already have as much as a 15% share of the total market in Europe (e.g., in Denmark carrots, eggs, butter, milk). The growing demand throughout Europe is a key factor in the future development of this market.

Table 4: The European market for organic products in 2002

Country	Total turnover in millions of €	% of total retail sales of food and beverages	Annual growth	Estimate for 2005 in million €
Germany	3.0	2.3	5–10	3.7
Italy	1.5	1.2	5–15	1.6
France	1.5	1.0	5–10	1.7
Belgium	0.3	2.2	5–10	0.35
United Kingdom	1.45	1.2	10–15	2–2.5
Switzerland	0.7	3.0–4.0	5–15	0.9–1.0
The Netherlands	0.38	1.4	5–10	0.5
Denmark	0.27	3.5	0–5	0.27–0.3
Finland	0.26–0.28	1.0–2.0	–	–
Austria	0.33	2.9	5–10	0.35–0.4
Sweden	0.35–0.45	1.5–2.0	10–15	0.4–0.5
Europe	9.5–10.5	–	–	11.8–12.8

Source: FiBL, 2003, ITC 2002

In Germany, Austria and Scandinavia the greatest challenge is to extend the range of products on offer and expand marketing channels. In the countries of southern Europe, where marketing efforts were

originally entirely export-oriented, the challenge is to create regional markets and promote awareness of organic products in the domestic market. The same also holds true for the countries of Central and Eastern Europe.

1.3 Market structures

European consumers buy organic products either direct from the farm, in specialist natural food stores and, increasingly, in traditional supermarket chains. Different countries have followed different marketing paths. Whereas in Germany for example direct sales and sales via specialist organic food stores predominate, the organic movement in the United Kingdom and Denmark targeted the supermarkets as a sales channel from the outset. Countries where organic products are sold mainly via conventional retail channels have higher market growth rates and larger market shares than in countries where natural food retailers are the main outlets for organic products. The second most important factor is the existence of a national umbrella brand name for organic products. The importance of supermarkets as an outlet for organic products will continue to increase in the coming years; most of the market growth in the organic sector is likely to come from this channel.

Web information corner on the organic market in Europe

http://www.soel.de
The German Foundation Ecology and Agriculture (Stiftung Ökologie & Landbau, SÖL) has published a study entitled "Ökologische Agrarkultur Weltweit – Organic Agriculture Worldwide" on its website. A copy of this bilingual (German/English) study may be obtained either direct from SÖL or downloaded from the internet (www.soel.de/oekolandbau/weltweit.html).

http://www.intracen.org/
The website of the International Trade Center (ITC) in Geneva. The ITC has produced an overview of the market for organic products worldwide.

http://www.organic-europe.net
gives reports and database on organic agriculture in Europe.

http://www.green-tradenet.de
Information network on organic raw materials worldwide.

http://www.biogene.org
Information Turntable for GM-free Production.

http://www.organicTS.com
Information about market opportunities world wide for organic products.

http://www.eisfom.org
European information System for organic markets gives information of 32 European countries for organic products.

2. Access for organic imports: Requirements and conditions

2.1 General framework

The European Union (EU) has a Common Agricultural Policy (CAP), a common commercial policy and common import and customs regulations for imports from outside the EU. Organic products are subject to the same customs tariffs as conventional products. The ACP-EU Partnership Agreement (Cotonou 2000) forms the basis for developing long-term cooperation between the EU countries and the 69 African-Caribbean-Pacific countries (ACP countries). The Agreement provides for preferential tariffs for the ACP countries. It also provides for "general preferential tariffs for developing countries". Products from the Least Developed Countries are duty free. In order to take advantage of preferential tariffs, imported goods must be accompanied by a certificate of origin. The Common Agricultural Policy applies quantitative restrictions and special charges for agricultural imports (depending on the product, the season and country of origin). These also apply to organic products. Importers must apply for an import licence. The current World Trade Organization (WTO) reform negotiations are pushing forward towards liberalization of trade in agricultural products based on the resolutions of the GATT Uruguay Round. A key element in this is the commitment on the part of the industrialized countries to reduce customs tariffs and export subsidies by a further 13–24% by the year 2004. The aim of the WTO is to facilitate access for emerging economies and economies in transition to the markets of the industrialized countries.

The Fifth WTO Ministerial Conference was held in Mexico in September 2003. The main task was to take stock of progress in negotiations and other work under the Doha Development Agenda.
The Conference ended with the conclusion that despite considerable movement in consultations, members remained entrenched, particularly on the "Singapore" issues. It is most likely that the small developing countries will suffer most for the inability to come to an agreement on the different issues discussed. However, it was decided in December 2003 that the Doha Development Agenda should be discussed further in smaller meetings during the coming years.

2.2 The EU Regulation on organic production

In the Member States of the EU, plant products are governed by Regulation No. 2092/91, which came into force in 1993, while products from organically managed livestock are governed by EU Regulation No. 1804/99, enacted in August 2000. These constitute an important step towards consumer protection. They protect producers from unfair competition and they protect consumers from pseudo-organic products. Plant and animal products, and processed agricultural goods imported into the EU, may only be labelled using terms such as "organic" in English and "biologisch" or "ökologisch" in German, etc., if they conform to the provisions of the EU Regulation. The EU Regulation on organic production – like the Swiss Organic Farming Ordinance – lays down minimum rules governing the production, processing and import of organic products, including inspection procedures, labelling and marketing, for the whole of Europe. In other words, the Regulation defines what constitutes an authentic, certified organic product. Each European country is responsible for enforcement and for its own monitoring and inspection system. Applications, supervision and sanctions are dealt with at regional level. At the same time, each country has a certain degree of freedom with regard to how it interprets the Regulation on organic production and how it implements the Regulation in its national context.

2.3 Importing goods into the EU

The regulations on imports in the EU Regulation on organic production are of great significance for the international market in organic products. Article 11 of the EU Regulation governs market access for organic products in the countries of the EU. It stipulates that organic foods imported into the EU from third countries must have been produced, processed and certified in accordance with equivalent standards. The exporting country must give details of the standards and inspection procedures implemented and these are evaluated by the EU. In this respect, the requirements and conditions relating to access for organic products are comparable to those laid down in the Swiss Organic Farming Ordinance (see Part A, Chapter 4 of the present handbook). Enforcement is the responsibility of the EU Member States, although in Germany it is in fact carried out at the level of the German federal states

(Länder). For examples see Chapter 3 of Part B (EU Regulation see Annex II).

At the present time there are two ways of authorizing imports into the EU:

I. Access via the list of third countries in accordance with Art. 11, paragraphs 1–5: A country or certification body may apply to be added to the list of third countries (EU Third Countries List) via its diplomatic representatives in Brussels. In order to be added to this list, the country making the application must already have enacted organic farming legislation and a fully functional system of inspection and monitoring must be in place. In addition, it must provide an attestation of equivalence and other information on organic farming methods. The European Commission decides upon the application based on an assessment of the implemented system and the results of an evaluation visit conducted by EU experts to evaluate the implementation and functioning of the legislation in the respective country. To date only 8 countries have been included on the list: Argentina, Australia, Costa Rica, Czech Republic, Hungary, Israel, New Zealand and Switzerland. Goods imported from these countries need to be accompanied by a consignment-specific "Certificate of Inspection for Import of Products from Organic Production".

II. **Access via import permit** in accordance with Art. 11, paragraph 6, for all countries not included on the list of third countries (i.e. the vast majority of imports into the EU). As a rule, certification bodies operating at the international level will assist exporters and importers to put together all the information and evidence needed to accompany the application for an import permit. Requirements vary from one EU country to another, but the following are those that generally apply (for specific country requirements see Chapter 3): Import permits are only issued to the importing company by the EU Member state authority into which the product is first imported. This company needs to sign an inspection contract with a European certification body that is approved in the EU. For imports from countries outside the EU and not listed on the third country list the importer applies for an import permit with the local competent authority. With the application he or the certification body he assigns to this task has to provide documentation to prove that the production and certification of the respective products is in consonance with the EU requirements. The competent authority may request additional information, e.g. the inspection reports or evidence that the certification body active in the third country is complying with ISO 65 (EN 45011). Products may not be released into the EU market until an import permit has been issued. Import permits are usually issued for a limited time period. Re-application is necessary when they run out.
Each consignment needs to be accompanied by a "Certificate of Inspection for Import of Products from Organic Production".

Within the EU all organic products may be freely traded. However, procedures relating to the issue of import permits are not the same in all EU countries. It is advisable to seek advice from the relevant authorities before trading commences.

2.4 Requirements relating to inspection bodies

Since January 1988, all inspection bodies accredited in the EU must satisfy the requirements of the EN 45011 standards (these are identical to ISO Guide 65; both set out general standards for certification bodies), in order for suitable imports of organic goods to be approved by the European authorities. Because of the requirement of equivalency, this also applies to all inspection bodies in third countries from which certified products are imported into Europe. In other words, it also applies to local inspection bodies in emerging markets and markets in transition. There is a recommendation by the EU on options for going about this:

1. The inspection body is accredited by an accreditation body in accordance with EN 45011 standards. The accreditation body must be accepted by other accreditation bodies. This happens on the European level by signing the EA-MLA (Multilateral Agreement signed by members of the European co-operation for Accreditation). On the international level the respective organisation would be IAF (International Accreditation Forum), the international association of accreditation bodies – however the IAF members are still ne-

gotiating the MLA on ISO 65 and for accreditation bodies outside of the EU there is so far no possibility to sign a MLA on ISO 65.
2. The inspection body has been approved by a competent authority in the third country in accordance with EN 45011 or ISO Guide 65.
3. The inspection body has been assessed by a qualified expert in accordance with EN 45011 or ISO Guide 65. A supervisory authority in the EU has confirmed the assessment.

Although these options are not officially passed by the EU the EU Member States are more or less following them. At the present time, confirmation of assessments carried out by experts under option 3 is only undertaken by German authorities. Confirmation by a German authority is, however, recognised in all of the EU countries. In Germany the view is taken first of all that in many third countries option 2 does not exist and second, there are only very few accreditation organisations corresponding to option 1. A checklist is obtainable from the German interstate working group of organic control authorities *(Länderarbeitsgemeinschaft zur Verordnung EWG 2092/01, LÖK)* giving details of how an expert assessment in accordance with options 1, 2 and 3 should be carried out.

The EU countries have not reached any agreement as to whether they should recognise IFOAM as an accreditation organisation under option 1 or 3. The IFOAM accreditation programme, run by the International Organic Accreditation Service (IOAS), has so far been recognised primarily in the Scandinavian countries. Also in Germany the competent authority accepts the IOAS reports under option 3. IOAS accreditation is not officially recognised by the EU authorities because IOAS is not a signatory or member of any of the organisations mentioned above (EA-MLA, IAF-MLA). Obstacles for membership are the international character of IOAS whereas the accreditation bodies are usually focusing on the national level.

2.5 EU logo for organic products

In February 2000 the European Commission introduced a logo for organic products that may be used throughout the EU by producers operating in accordance with the provisions of the EU Regulation on organic production. The logo may only be used on organic products where 95% of the ingredients are organic products that originate from the EU and that have been processed, packaged and labelled in the EU. According to a legal interpretation presented by the European Commission, the EU logo can now be used on imports from countries that are deemed to have an equivalent inspection system. These are the countries on the Third Country List (see chapter 2.3). For imports to carry the EU-logo when they are accepted into the EU under Article 11. 6, the certification body must be supervised by the authorities in the country of inspection. Not many countries outside the EU and US or that are not on the EU third country list, have a system for supervision of inspection bodies. Use of the new symbol is voluntary and it may also be used in conjunction with national government or private logos for identifying organic products. So far only few companies, especially in Southern Europe, are using the EU logo and the market impact is low.

Figure 9: The EU logo for organic products

The new logo is designed like those that were developed previously relating to protection of geographical indications and designations of origin (OJ L 224 of August 11, 1998) and to certificates of specific character (OJ L 275 of October 6, 1994) for agricultural products and foodstuffs. It contains twelve stars as the symbol of the EU and may be used in colour (blue and green) or black/white. The appropriate reference to organic production has been laid down for each language, but the logo may also be bilingual.

2.6 How the EU Regulation on organic production relates to other standards and laws

Some countries in Europe had already formulated their own legislation on organic production or private standards and labelling schemes before the EU Regulation came into force, sometimes many years earlier. These quality marks, for example in Denmark, Austria, Sweden and Switzerland, are well trusted by consumers and are one of the reasons for the current boom in the market for organic products in these countries. All national legal norms on organic production standards in the EU member states have been rendered void when the EU Regulation entered into force. The same will apply when the accession countries like Poland, Hungary enter the EU in 2004.

Web information corner on requirements and conditions relating to access for organic imports

http://europa.eu.int/eur-lex/en/consleg/main/1991/en_1991R2092_index.html
The EUR-Lex website leads to a consolidated version of the EU Regulation No. 2092/91 and includes amendments up to 23.03.2002. Available in all languages of the EU.

http://www.wto.org/
The website of the World Trade Organization gives the current status of the negotiations on the Agricultural Agreement and international commitments to reduce agricultural subsidies.

http://www.iafinc.org/
The members of the International Accreditation Forum (IAF) and the fields where they have already signed Mutual Recognition Agreements (MLA) may be viewed on the website of IAF.

http://www.european-accreditation.org/
The Multilateral Agreement for inspection and certification bodies is available on the homepage of the “European co-operation for Accreditation” organization.

http://www.iso.ch/
The homepage of the International Organization for Standardization (ISO), which has its headquarters in Geneva, contains details of ISO 65 pertaining to certification bodies.

http://www.cenorm.be/
The web pages of the European Committee for Standardization (CEN) give full details of EN Standard 45011.

http://www.ifoam.org
The website of IFOAM the International Federation of Organic Agriculture Movements publishes in the chapter “organic guarantee system” the Basic Standards and the Criteria for accreditation. It provides also information on the IFOAM Accreditation Programme.

http://www.blw.admin.ch/themen/aw/bio/e/index.htm#links
On the homepage of the Swiss Federal Office for Agriculture there are lists of approved European and Swiss certification bodies for downloading.

Figure 10: Governmental and private logos for organic products in Europe

Belgium

Denmark

Germany

Spain

Great-Britain

Netherlands

Finland

Norway

France

Austria

Sweden

Italy

3. Major markets: Selected countries

Chapter 3 gives detailed information on the major organic markets in the EU- Austria, Denmark, France, Germany, Italy, Sweden, The Netherlands and the United Kingdom. Country addresses are listed in Annex IV.

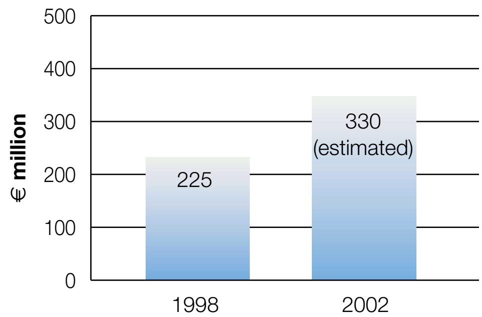
3.1 The organic market in Austria

3.1.1 Market volume and potential

The first organic farms in Austria were established in the 20's but the real organic boom phase started in the beginning of the 90's when in 1991 the Austrian Ministry of Agriculture and Forestry introduced national conversion subsidies through its program ÖPUL – Austrian National Aid Programme for the Promotion of Extensive Farming which protects the Natural Living conditions *(http://www.bmlf.gv.at/frame.html).* By 1999 according to ARGE, the Austrian umbrella organisation for organic farming *(ARGE; http://www.bioclub.at)* 64.5% of Austria's organic farmers were organised into farmers' associations. The associations about eleven of them, at present, have established their own standards, some of which are stricter than the existing legal standards in Austria (Council Regulation (EEC) No. 2092/91 and the Codex Alimentarii). Besides ARGE *(http://www.bioclub.at)* a second organisation was also formed in 1994, the ÖIG *(http://www.oekoland.at).*

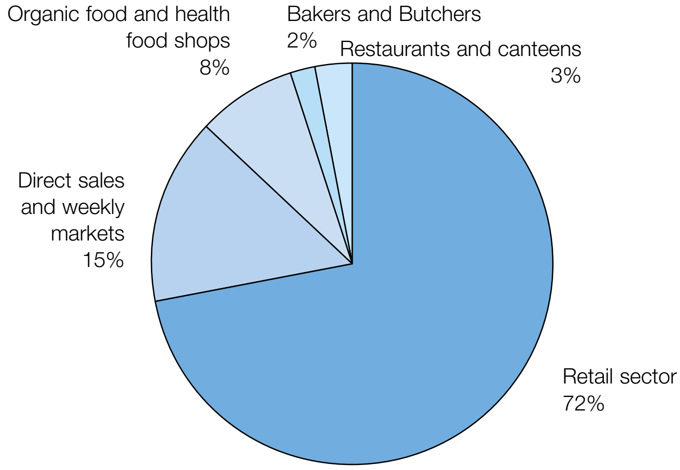
Apart from the state, retail chains and food processors also influenced the development of organic agriculture by promoting organic products in linking them with

Figure 11: Organic food and beverages in Austria 1998–2002



Source: Kortbech-Olesen, 1999, FiBL, 2003

Figure 12: Sales channels for organic products in Austria in 2000



Source: Hamm et al., 2002

vitality and the preservation of Austrian landscape and culture. Thus organic farming accounted for 297,000 ha by the end of 2002, which was 11.6% of the total agricultural area.

The market share of organic products is about 3% of the total food sales estimated for up to € 330 million. Important organic products for the Austrian market are milk, cereals and vegetables like carrots, onions and potatoes. Potatoes have a market share of 11.9% in the total organic sales in Austria, fresh milk 8.9%, yoghurt 5.5% and butter 6.3%. Cheese, meat, fruits and vegetables each have a share between 3–4% of which fruits and pork show increasing trends. Retail chains are the main sales channels with a market share of more than 70%. Direct sales and weekly markets is about 15% and organic food stores, bakers and butchers, private restaurants and canteens make up for the rest approx.15%. The average consumer price premium for organic products is about 59% being moderate in milk and eggs but high in vegetables.

It is expected that organic food sales in the conventional retail trade could reach a market share up to 15–20% by 2005 while the government strives for 30% organic volumes by 2006. In 2001 the Austrian Ministry of Agriculture and the organic umbrella organisation ARGE- Biolandbau further proposed a promotion concept for organic agriculture in Austria concerning consumer information, marketing, training, advice and research.

Even though 72% of the Austrian population buys organic products, the volume is expected to rise, as consumers in Austria mostly trust the organic origin. Motives for buying organic products are health and care for environment, better taste, support for own region, education and higher income. Nevertheless bottlenecks do exist in organic sales like the price differences, equal quality as conventional items, the lack of taste, short shelf life and the small choice. Also on the farmer's level there are some barriers for market expansion. There are even farmers who reconvert to conventional production systems due to problems in the advisory system or problems in selling organically produced products as a labelled organic product. Challenges for the future include developing ways of cooperative management taking into consideration the interests of the supply chain and "Bio Regions" (regions where a high percentage of farmers practice organic agriculture and market their products locally).

3.1.2 Imports and market requirements

About one third of all organic products sold in Austria are imported from The Netherlands, France, Germany and Italy. Of the € 330 million sales of organic products in the last year € 72 million came from imported products. 50% of this accounted for the organic vegetables imported from the Mediterranean countries and Germany. 20% of the organic cereals consumed were imported. It is mostly the supermarkets themselves and also the large organic wholesalers that directly import organic products. The conventional importers are not so much involved in the organic imports but their interest is growing. There was also a noted amount of import of oil seeds from Hungary, Czech Republic and Germany.

3.1.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in Austria: The additional statutory regulation, called Austrian Food Codex (Österreichischer Lebensmittelkodex), includes standards for animal husbandry and aquaculture and standards for approved ingredients, additives for processing of organic animal products. These standards are mandatory for any organic production and processing in Austria. Products imported from other EU Member States or from third countries only have to comply with the EU Regulation 2092/91; compliance with the Austrian Food Codex is not required by them.

The inspections laid down by the EU regulation on organic farming are conducted by seven private inspection bodies. These inspection bodies are approved and supervised by the Lebensmittelbehörde

Table 5: Import and export of organic agricultural products in Austria

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	2,000	NL, CZ, DE	5,000	DE, FR, CH, DK, GB
Oilseeds	1,500	NL, CZ	100	DE, CH
Potatoes	600	EG, IL, IT, FI, ES, DE	5000	GB, IT, DE, CH
Vegetables	9,400	IT, FR, ES	2,200	DE, GB, IT, CH
Fruits (incl. Nuts)	9,800	IT, FR, ES, CL	500	DE, CH
Wine (hl)	–		10,000	DE, SE
Milk and Milk products	1,000	DE, FR	30,000	DE, GB, ES, NL IT, FR, CH
Beef	–		100	IT, FR, NL, BE, DE
Pork	–	DE, NL	80	IT, DE
Poultry	–	DE	–	
Eggs (in million pcs.)	–		2	IT, CH

Source: Omiard unpublished results, 2003

(Food Authority) of respective land (province). Precondition for the authorisation as inspection body is the accreditation according to EN 45011, which is conducted by the Bundesministerium für Wirtschaft und Arbeit (Ministry of Economy and Labour).

There are a number of private organic farming associations with their own standards for production and processing. These standards usually exceed the requirements of the statutory regulations. The organic farming associations authorise members and licensees to label products with the logo of their association if they meet their labelling requirements.

Bio-Ernte Austria (former Ernte für das Leben) is the biggest and best known organic farming association in Austria, boast of 11.500 farms and more than 200.000 ha agricultural area (year 2002, http://www.ernte.at/frameseiten/f_wer_mitgl.html). For products that are supposed to be labelled with the association's certification mark (Ernte) the use of ingredients not certified by Ernte is not permitted.

The AMA logo is the national label for products from organic agriculture. The label, managed by the Agrar-Markt-Austria-GesmbH (AMA), may be used for all products produced according to EU Regulation 2092/91 and chapter 8 of the Austrian Food Codex ("Österreichischer Lebensmittelkodex"). There are two types of the AMA-logo. The red and white label includes an indication of origin. This label can be used on organic products where 70% of the value determining ingredients originate from the country or province that is indicated on the label. The indication of origin is not restricted to Austria. For the black and white label there are neither any references to the origin of products nor any other restrictions. The use of the AMA logo requires a contract with AMA and an objective inspection of the requirements.

The import of organic products from third countries is regulated by the EU Regulation on organic farming. Applications for import permits for organic products have to be issued by the importing company to the Lebensmittelbehörde (Food Authority) of the Bundesland where the importing company is located.

3.2 The organic market in Denmark

3.2.1 Market volume and potential

Denmark is one of the pioneers in promoting organic agriculture. Since the first organic legislation was introduced in Denmark in 1987, it has been the government's policy to actively promote organic farming. Denmark has one of the largest consumption rates of organic products per capita worldwide. It is also one of the top ten countries in Europe as regards the organic share of the total cultivated area. Organic products accounted for 3.5% of total food sales, which was about € 270 million in 2001. In 2002 retail sales for Organic food and beverages are estimated to have reached € 350 million. Organic farming accounted for 6.6% of the total Danish farmland (corresponding to 178,360 ha) in 2002. The number of orga-

nically managed farms increased from 2200 in 1994 to 3714 in 2002 (5.9% of all farms in Denmark). The average size of organic farms in Denmark is 48 hectares.

Development of organic farming goes back to the 1920's when Denmark experienced a widespread interest in natural living and natural foods that was followed by the establishment of The Biodynamic Association in 1936. The Danish movement was further organised with the foundation of the Danish Organisation in 1981 for organic farming that was made up of farmers, consumers and processors with its own growing and breeding regulations and an independent inspection. The rapid development of the sector in recent years is a result both of government support and strong co-operation among government authorities, organic farmers and the retail trade, in particular FDB (Coop Denmark). The state is aiming at 10% of organic farms by 2005.

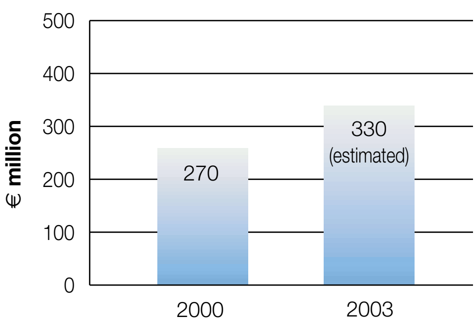
Guidelines for conversion to organic farming in Denmark are more stringent than in many other EU countries because in Denmark the whole farm must be converted. Conversion subsidies are granted up to a maximum amount of 5,000 Danish crowns.

About 90% of all organic products are sold in supermarkets (FDB, Dansk Supermarket, IRMA, SuperBrugsen etc.) and discount stores. Only 4% is handled by organic health and speciality shops and 7% via direct sales. The main organic items are cereals, milk, dairy products, eggs, fruits and vegetables. Organic carrots, eggs, butter and milk already have market shares of more than 15% of the total sales in each product category. A market share of 10% for all organic food and beverages in relation to overall sales (organic and conventional) is expected by the year 2005. Organic products achieve average price premiums of 20 to 30%.

Due to the government-controlled Ø label, organic food and beverages are easy to find in Denmark. This label is well known because of intensive advertising and is trusted by the customers.

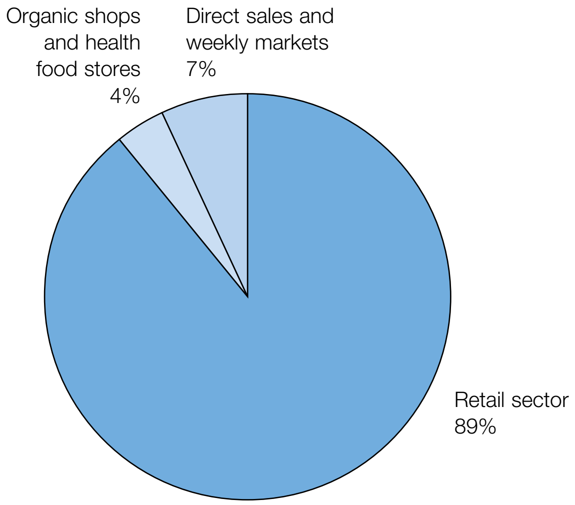
From the point of view of an exporter, the food processing industry is the most important market segment, as most imports consist of raw materials that are repacked or processed in Denmark. There are interesting prospects for exporters in emerging countries and countries in transition who can supply quality products at competitive prices. Importers and food processors are interested in obtaining more supplies direct from source – depending on the product in question and provided there is

Figure 13: Organic food and beverages in Denmark for 1998 and 2002



Source: FiBL, 2003

Figure 14: Sales channels for the organic products in Denmark in 2000



Source: Richter et al., 2003

confidence in the certification procedure applied in the producer country. Product innovations and consumer confidence in the authenticity of the organic origin of the product are necessary conditions for the market potential to be realised fully.

3.2.2 Imports and market requirements

Imports of consumer-packed organic food and beverages are currently insignificant. This is because only products that are processed or packaged in Denmark are allowed to use the government owned Ø logo. Therefore imports of organic food and beverages are largely in the form of unprocessed or semi-processed raw material.

Markets for vegetable, root and tuber products have grown rapidly. Organic carrots represent 13% of the total carrot sales in the supermarkets. Imports of fresh vegetables are mostly from The Netherlands, France, Italy and Spain. The production of organic fruits and berries is small, the main crops being blackcurrants and pears. About 3,000 tonnes of fresh fruits were imported in 2000. Regardless of their original origin, most fresh fruits are imported via The Netherlands. Almost all imports of fresh organic fruits are repackaged and labelled with the Ø logo in Denmark. The demand for dried fruits and nuts is met almost entirely by imports, which include temperate, subtropical and tropical fruits, nuts and kernels.

Processed organic tomato products are highly popular in Denmark. Small retail packs of frozen vegetables are already in the market. Demand for frozen organic vegetables is still only slight, but is on the rise. Import requirements are for bulk packed juice, which is then packed or bottled in Denmark. Imported deep-frozen fruits are further processed into marmalade and jam in Denmark.

Production of organic cereals tripled between 1992 and 1996 (reaching 21,000 t in 1996) and imports reached 83,600 tonnes in 2000. 29.5% of the rolled products sold in Coop Denmark are organic. The market for organic breakfast cereals is growing rapidly and imports are mainly done from Germany, Austria and Italy. In 1998, all FDB-owned bakeries switched completely to organic bread. Pasta, mainly of Italian origin, is imported in bulk, repacked in Denmark and labelled with the Ø logo.

All major retail organisations offer a selection of organic coffee and tea. Suppliers of organic coffee include Mexico, Guatemala, Costa Rica, Nicaragua and Peru. These are packed under a manufacturer's brand name and carry the Ø logo. Some packs also supplement the organic logo with the Max Havelaar Fair trade logo.

Dried herbs constitute an important product group. Products are usually imported in bulk, repacked in Denmark into small units and labelled.

Oil seeds of sesame and sunflower are imported. In addition to this soybeans are imported as it forms a basis for many different food items (tofu, soy drinks, vegetal burgers).

About 3000 hl of organic wine was imported and bottled in 2000 mainly from Germany and France.

Similarly products like organic baby foods are imported in retail packs from Germany.

Imports of animal feed have been allowed only since 1990. Organic animal feed is imported from Germany and the imports of cereals used as animal feed has grown several times.

The milk and dairy industry also play an important role and hold more than 30% of the organic products' market share.

Imports of organic meat and eggs are insignificant. A small volume of raw meat is imported from The Netherlands to produce organic sausages.

3.2.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in Denmark:

Table 6: Import and export of organic agricultural food products in Denmark

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	83,600 of which 63,600 Fodder and 20,000 Human	DE, IT	10,000	GB, DE, FR
Potages	2,000	DE	2,500	DE, SE
Vegetables	1,772		8,000	DE, GB
Fruit (incl. nuts)	3,000		100	
Wine hl	3,000		–	
Milk and milk products	–		30,000	GB, DE
Beef (incl. Veal)	–		66	GB
Pork	–		450	GB, IT
Poultry	No import of significance		125	GB, NL
Eggs (million pieces)	No import		20	

Source: Omiard unpublished results, 2003

Denmark implemented already at the end of the eighties a national label for organic products to promote organic agriculture: the national "Ø" label (Statskonrolleret Økologisk). The national Ø label that must be printed on all organic products indicates that the preparation of the product, e.g. its processing, packaging or labelling, has been controlled by the Danish authorities. The symbol is seen foremost on Danish products and also on some foreign products that have been packaged in Denmark. It is only if the final part of the control has occurred in Denmark (production, processing, packaging or labelling), that the Ø label can be used. Importers, processors and packers must register with the Danish authorities and their activities must be inspected by these authorities.

On the basis of the national inspections, the authorities grant the Ø label. Inspection and certification of organic products is a part of normal food control procedures and is therefore executed exclusively by public authorities (in contrast to most other European countries). The two authorities responsible for the implementation of the EU-Regulation on organic farming are the Danish Plant Directorate (responsible for the area of plant and animal production) and the Danish Veterinary and Food Administration (responsible for the area of processing and distribution).

Applications for import of organic food must be sent to the Food and Veterinary regional authorities and applications for import of organic feed must be sent to the Danish Plant Directorate. The Danish Veterinary and Food Administration can provide information about the relevant regional authorities.

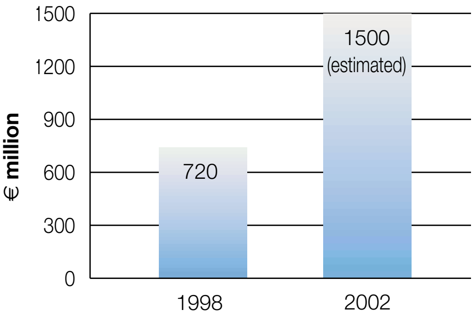
3.3 The organic market in France

3.3.1 Market volume and potential

The French organic market began to develop in the 1970s. In the 1990s, growth in both organic production and consumption accelerated, but at a much slower rate in France than in many European countries. By 2002 11,177 organic farms managed in total 509,000 ha (1.7% of farmland).
France has, with a population of more than 58 million, one of the largest food markets of Europe. However organic food just has a market share of 1.0–1.5% of total food sales. In 2002 sales in organic products was estimated at €1.2–1.3 billion.
75% of French households shop once a week at a supermarket. Supermarket chains have a market share of 42% (2002) of the total sales of organic products, and aim to participate more actively in the organic business in future. Specialist organic retailers account for 28% of organic product sales. 30% of organic products are sold in bakeries and via direct marketing. An increasing amount of organic products are expected to be channelled through catering, canteens and restaurants, and will gain importance in the organic market. Carrefour is the leading retail chain in organic food supply.

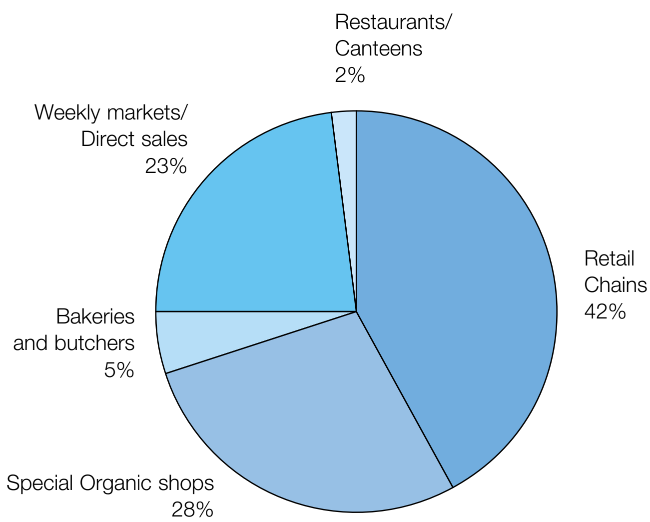
Growing environmental awareness, fear of food scares and scepticism of genetic engineering are stimulating demand for

Figure 15: Organic food and beverages in France 1998 and 2002



Source: Kortbech-Olesen, 1999, FiBL, 2003

Figure 16: Sales channels for the organic products in France in 2000



Source: Hamm et al., 2002, Richter et al., 2003 organic food and beverages in France. Growth rates of around 5–10% are expected for the organic market in the coming years. The development of the French organic market depends upon four factors:

- availability of organic products,
- consumer demand,
- government support and
- quality and professionalism of the organic trade.

In supermarkets, the products of integrated production, which are also strongly promoted and supported by them, are the main competitors of organic products in France.

The organic product groups with the strongest growth in sales are:

- Fresh fruits and vegetables, cereal products and beverages. These three product groups together account for almost half of total organic sales
- Dairy products, meat and meat products
- Dried fruits, legumes, culinary oils, coffee, tea, cocoa, sugar, honey, spices and culinary and medicinal herbs
- Prepared dishes.

Cereals dominate the processing sector. These are followed by dairy products, fruits and vegetables, spices, poultry products, medicinal and other herbs, soy products, meat, convenience products and coffee. Dairy products and the processing of eggs and poultry are also areas of growth within the processing sector. Now that a number of major food processors have commenced with organic production, an annual growth rate of 10% is expected in this sector too.

3.3.2 Imports and market requirements

Only a part of French demand for organic products can be met by domestic production. Off-season products and tropical/exotic organic products have ready access to the French market. Organic imports have grown very rapidly since the mid-1990s. The import volume from non-EU countries has multiplied between 1994 and 1997. EU imports come mainly from Germany, The Netherlands, the United Kingdom and Italy. Non-EU products are imported from North American countries (USA, Canada), Latin America (Belize, Bolivia, Colombia, Costa Rica, the Dominican Republic, Guatemala, Mexico, Paraguay), Eastern Europe (Poland, Hungary, Slovak Republic) and Africa (Algeria, Burkina Faso, Cameroon, Ethiopia, Guinea, Madagascar, Morocco, Senegal, South Africa, Togo, Tunisia and Zimbabwe). Imports from Asia are insignificant.

Emerging markets and markets in transition that already export EU-certified organic products have good prospects of expanding their exports to France. There is a good potential for imports for the following raw materials and final products from the tropics and the Mediterranean region:

Table 7: Import and export of organic agricultural food products in France

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	112,225 (00)	AT, IT, FI, DE	25,000	BE, CH, DE, NL, GB
Oilseeds	18,200 (99)	DE, IT	5,000	DE, NL
Olives for oil	2,200	ES, IT	300	
Potatoes	6,000	DE, ES, IL	1,000	AT, LU, GB
Vegetables	30,000	BE, ES, IT, NL	20,000	AT, BE, CH, DE, PT
Fruit (incl. nuts)	25,000	BE, ES, IL, IT	15,000	DE, GB
Wine hl	20,000	ES, IT	150,000	DE, DK
Milk and milk products	25,000 (99)	BE, DE	1,000	DE
Beef (incl. Veal)	800	DE	.	
Poultry	0		1,300	DE
Eggs (million pieces)	0		80	BE, DE, IT, GB

Source: Omiard unpublished results, 2003; FiBL estimations based on data from importing or exporting countries.

- Cereal, soy, sesame and amaranth products
- Rice and rice products
- Dried legume products (beans, lentils, chickpeas)
- Fresh fruits and vegetables
- Fruit juices and concentrates
- Dried fruits
- Deep-frozen fruits, concentrated fruit purées and pastes for processing
- Coffee, tea and cocoa, both raw and semi-processed
- Culinary and medicinal herbs and essential oils, in particular tropical herbs and oils
- Cane sugar and honey
- Culinary oils and fats (palm oil, soy, coconut, peanut, sesame and olive oil).

France meets its own needs in organic meat and organic dairy products, but imports 60% of its demand for protein-containing animal feeds.

3.3.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in France:

France was one of the first European countries to implement a national logo for labelling organic products, the "AB" logo (Agriculture Biologique). It has displaced other private organic labels in France and is the property of the French Ministry of Agriculture. The AB logo has become the most important label by which French consumers recognise organic products. The use of the AB logo is permitted after signing a logo-using contract and compliance with the requirements of the EU Regulation and additional production regulations as well as the inspection by an inspection body approved by the French Ministry of Agriculture. The differences between the requirements of the EU Regulation and the additional regulations especially refer to the production and preparation of animals and animal products (including aquaculture).

The AB logo may also be used for imported organic products from other European or third countries – provided that it can be proved that the requirements of the French production regulations have been met. However plant products have to be produced within the European Union unless the product is listed on the list for "exotic products". French approved inspection bodies may sub-contract foreign inspection bodies for inspection according to the AB-requirements.

In France, an array of private organic inspection and certification companies are approved by law (Aclave, Agrocert, Certipaq, ECOCERT Sarl, Qualité France, Ulase). These companies must meet the requirements of EU Regulation 2092/91 and be accredited according to the EN 45011 by COFRAC (Comité Français d'Accreditation), which is the official body for the accreditation of organic inspection and certification bodies.

3.4 The organic market in Germany

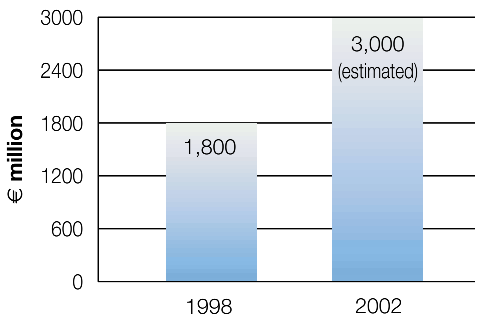
3.4.1 Market volume and potential

In Germany, first farms already converted to organic management in the early 20th century, when the first health food stores (Reformhäuser) were established. However, organic farming remained a niche sector until the 1980s, organic produce being sold only in health food and natural food stores (Naturkostläden). It was only in the early 1990s, when conventional retail chains began to sell organic products that sales surged. Today Germany as a market for organic products is Europe's largest and the world's second largest after the USA. A goal of the Federal Government is to expand the organic agriculture surface up to 20 per cent in ten years. The expansion is to take place on a long term basis, i.e. supply and demand is to grow heavily. In addition information and market transparency must be improved as well as weak points in production and marketing tackled. The basic conditions for a further expansion of the organic agriculture in Germany are defined in the federal program. It supplements the existing promotion policies around measures which support the development of organic farming at all levels from the production to the consumer. For this federal program in the years 2002 and 2003 the German government had a budget of € 35 million.

In 2002 there were 17,152 organic farms in Germany, the area under organic production amounting to 696,978 ha (4% of all agricultural holdings, with a share of 4.1% of the total agriculturally utilised area). Since German reunification, a number of very large organic farms have been established in the "new" (eastern) states of Germany, which operate at lower production costs than those in the western part of the country (former "West Germany"). In a cross-European comparison, Germany has an intermediate position. The German Federal programme for organic farming is now subsidising consultation for conventional enterprises that want to change over.

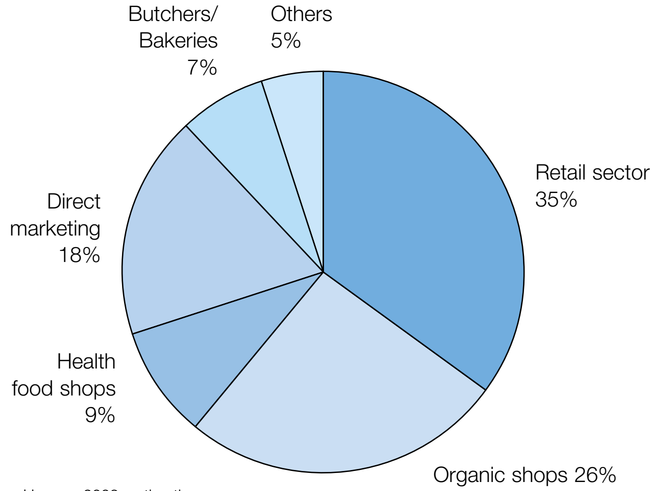
Organic food sales in 2002 are estimated at € 3.00 billion. This corresponds to a share of 2.3% of total turnover of the food market. By 2005, the turnover is expected to double. However, health and natural food stores still dominate today in Germany (35% of total sales of organic products). Only 35% of all organic products are marketed through supermarket chains today while further 18% are sold via direct sales. Nonetheless, German supermarkets are expected to increasingly enter the organic market. The specialized organic supermarkets that opened in the late 1990s are an attractive supplement to the specialist organic retail trade. Catering also has growing demand. The price premiums sway a lot between 18–142% and this is mainly due to small supply, high logistic costs and very high depreciation of retail chains.

Figure 17: Organic food and beverages in Germany 1998 and 2002



Source: Kortbech-Olesen, 1999, FiBL, 2003

Figure 18: Sales channels for organic products in Germany in 2002



Source: Hamm., 2003, estimations

National production meets more than 60% of organic demand. The main product groups are bread and bakery, dairy products, tofu products, eggs, fruits and vegetables and meat. A considerable share of the grains, cereals, muesli and beverages consumed in the country are produced domestically. The segments experiencing growth are meat, meat products, dairy products, seeds and plant products. The importance of both convenience products (ready and semi-ready) and deep-frozen goods is growing.

Short-term supply bottlenecks occur repeatedly on the German organic market. However, with improving availability this problem is expected to become less severe. The potential problems in the future development of the organic market in Germany are: the increasing discount orientation of retailers and consumers, a deteriorating agricultural policy context, price dumping for organic products by supermarket chains or the loss of regional processing facilities.

3.4.2 Imports and market requirements

Germany is the largest European importer of organic products. 38% of the product value of all organic products is imported. Fruits and vegetables (fresh and processed) are the largest import item, with a share of 30% in terms of turnover of all imported organic goods and a share of 50% of organic fruit and vegetable consumption. In organic cereals and cereal products, and in eggs and poultry meat, imports account for 10 to 20% of domestic demand. Important organic import items also include nuts, tea, coffee, cocoa, spices, culinary oils and fats, sweeteners and bakery products. A large proportion of imports come from emerging markets and markets in transition.

3.4.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in Germany:

The Öko-Landbaugesetz regulates some aspects of the implementation of the EU Regulation 2092/91 (Organic Farming Law) and includes a provision for fines for companies that breach the EU regulation.

Various organic farming associations have developed their own standards, which go beyond the EU standards. These farmers associations certify the products based on their own standards whereas the inspections are delegated to EU approved inspection bodies. It is advantageous for exporters if, in addition to the EU Regulation, they also meet the requirements of private standards schemes. The most important difference between the standards of the farming associations and the EU Regulation is the requirement for whole-farm organic management, which does not allow parallel production of conventional and organic agriculture. Farms that subscribe exclusively to EU standards are permitted to operate conventionally on parts of the farm.

Organic farming associations authorise members and licensees to label products with the logo of their association. The

Table 8: Import and export of organic agricultural food products in Germany

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	100,000	IT, HU, CA, US, AR, AU, CZ, FI, AT, SE	80,000	FR, CH, AT, GB, DK, SE, NL, LU
Oilseeds	8,000	FR, IT, HU, US, AR, CN, IN, ES, AT, PT	3,000	GB, SE, LU, FR, PT
Olives for oil	–	–	–	IT, ES, GR, PT
Potatoes	6,000	AT, F, IT, IL, NL, HU	12,000	GB, DK, NL, IT, FR, AT, CH
Vegetables	50,000	IT, ES, FR, IL, NL, AT, DK, MA, AU, AR, BE	10,000	GB, DK, SE, NL, FR, FI, NO, LU, CH
Fruit incl. nuts)	30,000	IT, ES, IL, FR, TR, AR, CL, US, GR, NL, AT, BE, ZA DO, NZ	2,000	GB, SE, DK, NO, LU, CH
Wine hl	120,000	IT, FR, ES, AT	10,000	GB, DK, SE, US
Milk and milk products	15,000	AT, DK, NL, IT, BE, CH	25,000	FR, GB, IT, AT, LU, FI, DK, SE
Beef (incl. Veal)	400	DK, NL, AT, AR	600	FR, GB, BE, IT, LU, CH, NL
Sheep meat (incl. Lamb)	30	NL	50	GB, FR, NL
Pork	400	DK, NL, AT	600	FR, GB, AT
Poultry	200	HU, FR	10	LU, AT
Eggs (million pieces)	50	DK, FR, NL, CH	10	DK, LU

Source: Omiard unpublished results, 2003

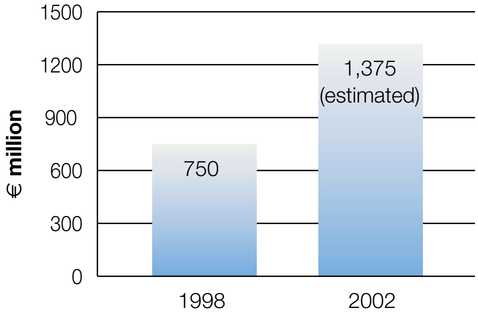
best-known private labels in Germany are Bioland, Demeter and Naturland. For products that are supposed to be labelled with the label of one of these associations the ingredients have to be certified according to these standards and it might be necessary for German inspection bodies to inspect them, even if equivalence at the European level had already been attested for the imported products.

There are 22 private inspection bodies approved according to the EU-Regulation. Ten of these are authorised to inspect importing companies, e.g. ABCert, Agreco, BCS, EcoControl, GfRS, IMO, Lacon. These companies usually support the import companies in applications for import permits. Since May 2003 the Bundesanstalt für Landwirtschaft und Ernährung (BLE) (Federal Agency for Agriculture and Food) has been the competent authority for issuing import permits for imports from non-EU countries according to article 11, paragraph 6 of the EU Regulation. An application form for import permits may be ordered at sachgebiet-oekolandbau@ble.de. The import company has to document in the application the equivalency of production and inspection measures with the EU-Regulation and explain deviations. The inspection body of the exporting company has to confirm these statements. Only an application signed by the importer and the inspection body of the exporter in the third country will be accepted by the BLE.

In October 2001, the Ministry of Consumer Protection, Nutrition and Agriculture introduced a national label for organic products, the "Bio-Siegel". The Bio-Siegel was introduced with a vast promotion and marketing campaign. It is already well-known. Companies complying with the EU-Regulation 2092/91 may use the Bio-Siegel if they notify the logo-use with the "Informationsstelle Bio-Siegel" (information service Bio-Siegel). There are no restrictions for imported products. The use of the label is free, however there are guidelines for the design of the logo.

There are supermarket trademarks e.g. BioBio (Plus), Bio-Wertkost (Edeka), Füllhorn (Rewe) and increasing marketing activities for organic products in the conventional retail trade in Germany. Usually these trademarks are based on the standards of the EU Regulation, but there are stronger requirements regarding the product security.

Figure 19: Organic food and beverages in Italy 1998 and 2002



Source: Kortbech-Olesen, 1999, FiBL, 2003

3.5 The organic market in Italy

3.5.1 Market volume and potential

Italy has the largest land area devoted to organic farming in Europe, which is about one quarter of the European Union'"s organic utilised area. In 2002 as per the Ministry of Agriculture about 1,168,212 ha were cultivated organically. There were 55,902 organic enterprises including 49,489 farms. The target is to reach 10% of all agricultural area in Italy converted to organic standards by 2005.

Organic agriculture really took off in Italy in the mid eighties with the establishment of the National Commission of Organic

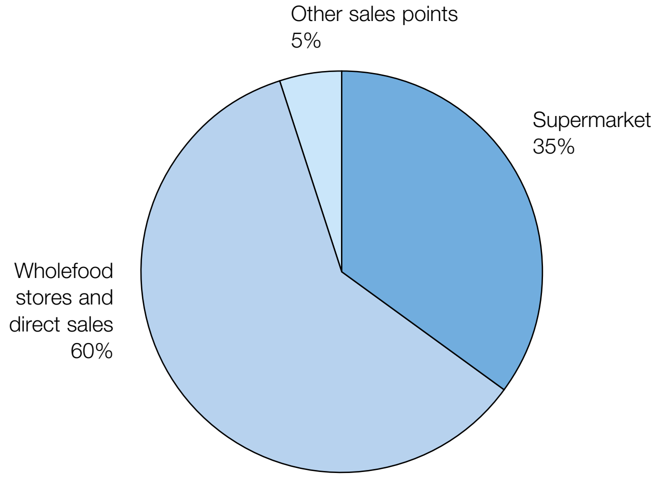
Agriculture that had its own nation wide self-regulatory standards for organic farming. FIAO founded in 1992 is the Federation of the principal organic and biodynamic producer and certifying organisations. It represents the organic sector at a political level and informs the public about organic farming. In 2001 a consortium was founded which unites the major Italian processors and marketing companies.

Italy is the largest supplier of organic products within the EU and the most important categories of organic products are forage/ pasture/ meadows (47%) and cereals (19.5%), olives (8.7%) and fruit including citrus fruits (5.6%). Organic cereals mainly durum wheat for pasta making followed by barley, soft wheat and rice represent around 20% of the total organic agriculture production in Italy. Production of organic fruits and vegetables is mainly in the south especially citrus. Organic cattle numbers in 2002 were 164,536 and for pigs it was 19,900 (Ministero delle Politische Agricole e Forestali 2003). Sheep and poultry figures have doubled in the last year. Organic olives are grown in an area of 102,055 ha. Organic milk production has gone up by 18% to 7,6 million kilograms. The same was also for other milk products like butter and yoghurt.

Organic product sales amounted to € 1.17 billion in 2001. They have a market share of 1.5% of the total food purchase in 2002. According to a research study consuming of organic products in Italy can reach a turnover of € 5.2 billion in 2005 and the market share rise by 3.3%. 67% of all organic operators are based in the Southern region, 12% in the centre and 21% in the northern region. Organic products are more available in the North the reasons being established distribution channels and 78.7% of the Italian Supermarkets with organic fruits and vegetables are located in the North.

Of the 55,902 registered enterprises there are 4,346 processors, 155 importers, 122 export companies, 1,700 supermarkets and 1,000 agricultural and health food stores.

Figure 20: Sales channels for organic products in Italy in 2003



Source: Consorzio per il controllo dei prodotti biologici, 2003

Table 9: Import and export of organic agricultural food products in Italy

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	200,000	ES, FR, AR, AU, HU	300,000	NL, GB, DK, SE, DE, BE, ES, PT, CH, FR
Oilseeds	NA	NA	NA	DE, FR
Olive oil	80	ES, GR, TN	10,000	DK, GB, DE, US, JP, CH, FR
Vegetables (incl. potatoes)	4,280	AT, DE, NL, EG, ZA, CM, AO, TU, IL	21,823	AT, BE, CH, FI, GB, NL, GB, DK, SE, DE
Fruit (incl. nuts)	12,484	ES, DO, AR, CO, PE, NZ	199,441	AT, BE, CH, FI, NL, GB, DK, SE, DE
Wine (Hl)	–	–	490,000	US, JP, EU
Milk and milk products (Hl)	120,000	AT, DE	7,000	AT, DE, CH, NL, UK, DK
Beef (incl. Veal)	200	AT, DE	–	–
Pork	110	AT, DK, DE	35	DE, FR, GB
Eggs (million pieces)	15	AT, FR	–	–

Source: Omiard unpublished results, 2003

It is expected that by 2005 supermarkets would alone have 60% of the market shares for organic products. The price premium on organic products is 25% in supermarkets and 30% in specialised organic stores. The prices paid for organic fruit and vegetables though varies according to the season and is at times comparable to the conventional one. A little less than half of the Italians are willing to pay more for organic products compared to conventional ones but the limit is often 20%. Italian consumers attach great value to the origin of the product and the relation between health and nutrition, no chemicals and the support for ecological development.

3.5.2 Imports and market requirements

Domestic production does not match with the domestic demand and organic product imports are mainly from Argentina, Chile and some parts of Europe. Fruit and Vegetable packers such as Arabios, Di Rosa and Cannizzaro are involved in importing. Imports are mainly from Austria and Germany for milk and milk products, which have recently had a sharp rise. Nuts are imported from Spain, Dominican Republic, Argentina, Peru and New Zealand. Cereal imports were up to 200,000 tonnes in 2001 but these were mainly from Europe.

3.5.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in Italy:

In 1992 a governmental decree (Decreto ministeriale 338/92) drafted a centralised notification and accreditation system of private inspection bodies. In 1995 a new decree (Decreto legislativo 220/95) replaced Dm 338/92 and defined the coordinative role of the ministry and the supervisory tasks of both the ministry and the regional authorities. In addition, the decree Dm 338/92 defines:

- the requirements for inspection bodies and their evaluation procedure
- the forms to be used by operators and inspection bodies
- the procedures for certificates and imports

Competent authority for the application of Council Regulation (EEC) 2092/91 is the Office for inter-professional agreements and organic farming (Ufficio associanismo accordi interprofessionali ed agricoltura biologica) of the Ministry of Agriculture and Forestry (Ministero per le Politiche Agricole e Forestali – MiPAF). MiPAF currently authorises 15 private inspection bodies for inspection and certification according to the Council regulation 2092/91. The inspection bodies are either accredited ac-

cording to EN 45011 by the accreditation body Sincert, or directly by MiPAF. Some Inspection bodies have an additional IFOAM, NOP and JAS accreditation, for details see the annexed list.

Before splitting up the original organization into inspection and associative bodies many organisations in the organic sectors had proper standards and a proper label. Since the organisations had to separate associative activities and inspection activities, only three organisations have proper standards of national significance: BioAgriCoop (certification by BioAgriCert), AIAB (certification by ICEA) and AMAB (certification by IMC).

Labelling foreign produce with one of the private labels can be done either by having the product certified directly by the corresponding inspection body, or through certification by an inspection body with which the label-owner has a contractual agreement.

Produce from EU member states, or countries that appear on the third country register (Council Regulation (EEC) 92/94), can be imported and sold as organic in Italy provided the produce is certified by an accredited inspection body in a member state or by an accredited inspection body listed in the annex of CR 92/94.

Produce from non-EU countries or countries that do not appear on the third country list, can be certified for the Italian market under the following conditions:

1. the produce has been certified by an accredited EU member state inspection body
2. in case the inspection body is not registered and accredited by an EU member country, application for import licences of organic products must be presented to MiPAF. Based on the relevant documentation listed in MiPAF Circ. no. 3 del 16/6/2000, MiPAF will evaluate equivalence with the Council regulation 2092–91 and authorise, or not, imports into Italy. The process is reported to be long and arduous.

3.6 The organic market in Sweden

3.6.1 Market volume and potential

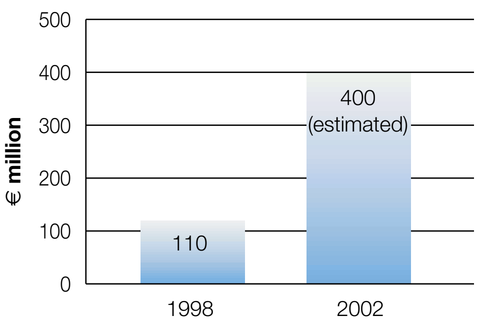
Organic development in Sweden started with the emergence of the first organic farms in the 1940's. Before the 1980's organic farming in Sweden consisted of a number of organisations working in isolation each with its own concept and philosophy. Then a common basis with a common concept of organic farming was formed in the beginning of the 1980's with a forum for co-operation SAO – Samarbetsgruppen für Alternative Odling (the Cooperation Group for Alternative Agriculture). The need to work with farmers interests like policy making and marketing led in 1985 to the establishment of ARF (Alternativodlarnas Riksförbund- the National Association of Alternative Farmers) which cared for developing this market and later came to be known as Ecologiska Lantbrukarna I Sverige (*http://ekolantbruk.se/ Swedish Ecological Farmers Association*) in 1994. It founded KRAV (*http://www.krav.se/*) with an aim to unite different practices under a common system of standards and certification. It brought together production organisations, processors, retailers, environmental groups and consumer associations and acted as a strong binding group. All this together with the first support to conversion to organic farming with the EU grants helped in development of organic farming in Sweden.

After careful market analysis the Board of Agriculture has set a new overall target of 20% organic agricultural utilised area in the year 2005. As of December 2002, the organic agricultural area amounted to 187,000 ha which is 6.1% of the total agricultural area and is cultivated by 3,530 organic farms (3.94% of all farms). The Ecological Farmer Association strives for 30% of the agricultural land to be organically used by 2010. Though experts regard a market share of 2.0–2.5% as realistic, retail chains which are the main marketing channels, hope for a market share of above 5% by 2005.

According to EU regulations (Sweden became a member in 1995) 14% of Sweden's agricultural area is organically used, but only half of the area is organically certified. In 1999 almost 10% of Sweden's arable land was either certified organic or was only participating on the national support programme for organic farming under Council regulation (EC) 2078/92. Other developmental factors included a well-organised sector, consumers trust and awareness of a single certification system and one label, good relationship between the organic and conventional organisations and engagement by the food chains. In Sweden to sell organic products they must bear the KRAV sign. It is the best known label to consumers for environmentally sound food products.

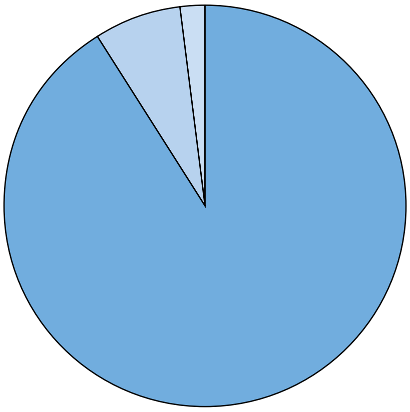
Two private sector bodies are recognised by the government authorities to carry out inspection and certification, KRAV *(http://www.krav.se) and Svenska Demeterförbunde (http://www.antroposofi.com/biodyn/demeter/intro.html).* Sweden has no national certification body or legislation defining organic farming.

Figure 21: Organic food and beverages in Sweden 1998 and 2002



Source: Kortbech-Olesen, 1999, FiBL, 2003

Figure 22: Sales channels for organic products in Sweden in 2001



Source: Richter et al., 2003

The organic market is currently growing at a rate of 20–30% per annum. The market share for organic products that is mainly dairy and fresh fruits and vegetables is between 1%–1.5%. While 91% of all organic products are sold via the retail sector only 7% is sold by direct selling activities or farmer shops and the remaining 2% by other channels. The multiple retailer COOP Sweden is one of the leading European companies in selling and promoting organic food (app. 7% sales share in organic food).

The average price premium is also quite low at about 30% with the lowest in milk and the highest in fruits and vegetables depending on the season. However milk presently has and will probably continue to have the strongest growth the next few years.

Eco Trade AB *(http://www.odal.se/odal/spannmal/krav/kravstyr.html)* the main marketing organisation for organic grain, is working for long term contracts with farmers who can supply sufficient quantity and good quality. Organic egg production has also grown in the last few years with 2.5% of the eggs laid now organic.

Motivation for the customers to buy organic food is their respect for animal welfare within the organic production systems, the environmental friendly agriculture and safety aspects. Nevertheless about 43% of the population never buys organic food. This can be related to the price premiums, the limited supply and less trust in the organic production.

3.6.2 Imports and market requirements

In Sweden organic products have been imported for more than a decade and the imports are higher than the exports. Imports are oriented towards products that are not produced or not available in sufficient quantities in Sweden like citrus and tropical fruits, cereals, vegetables

Table 10: Import and export of organic agricultural food products in Sweden

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	10,000	DE, US, IT, AR.	5,000	DE, CH
Oilseeds	5,000	DE, US	0	–
Olives for oil	0	–	0	–
Potatoes	40	IL.	0	–
Vegetables	1,000	IL, IT, DE, NL	0	–
Fruit (incl. nuts)	4,234	IT, NL, DO, DE	0	–
Wine	62,631 (l)	FR, ES, AT	0	–
Milk and milk products	20	DK, DE	10	GB, FI
Beef (incl. Veal)	0	–	435	GB
Sheep meat (incl. Lamb)	0	–	32	GB
Pork	0	–	316	GB, DK

Source: Omiard unpublished results, 2003

nuts, spices, green coffee and wine. Organic imports often use the same channels as non-organic products.

The largest import of organic fruits is banana from the Dominican Republic. Owing to inadequate supplies the imports of citrus fruits has so far remained insignificant, but there is a great demand for citrus fruits especially for Satsumas and Oranges and Swedish importers regard them as having high import potential. The major exporting countries to Sweden are The Netherlands, Denmark, Italy, USA, Israel, and Argentina. The real need for imports of vegetables is in April and June before the domestic harvest begins. A growing demand is also developing for herbs like Basil, Thyme, Tarragon, Coriander, Rosemary and Oregano. The Swedes are among the highest per capita consumers of herbs and spices within the European Union and therefore Sweden is a potential market. All dried fruits and nuts in Sweden are imported which include raisins, dates, figs, plums, apricots, almonds, cashews, hazelnuts and walnuts, etc. Organic dried vegetables imported are chickpeas, kidney and mung beans, lentils and also desiccated coconut and soy products including roasted soybeans. The most popular canned fruits are pineapple, peaches, pears and mixed fruits. Most of the trade for cereals etc. is carried out by a company Ecotrade. The company foresees a continued demand for basic organic cereals and for grains with high nutritional value. Sweden has the highest per capita consumption rates for coffee and green coffee is imported from Mexico, Nicaragua, Honduras, Guatemala, Costa Rica, Peru and Brazil. Organic baby food products have attained a large market share as high as 10% for certain products.

3.6.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in Sweden:

In Sweden there are no additional statutory regulations on organic farming.
The two competent authorities are the Ministry of Agriculture (Jordbruksverket) – responsible for agricultural production and the import of animal feed) and the Ministry of Nutrition (Livsmedelsverekt) – responsible for processing and import of organic products).

The solely approved private inspection body KRAV carries out inspections.
KRAV developed an extensive private standard that incorporates all relevant EU requirements and a number of stricter requirements. In addition, it regulates some areas not covered by the EU Regulation, as for example textile production, leather production, and aquaculture and pet food production. Swedish companies that signed a licence agreement with KRAV are allowed to label their products with the KRAV logo – provided the products have been produced according to the KRAV standards. The KRAV logo dominates the Swedish market and is well known by Swedish consumers. For market access the use of the KRAV logo is crucial.

Imported products that are supposed to be labelled with the KRAV logo have to be certified or re-certified by KRAV. These products need to fulfil the requirements of the EU Regulation as well as the applicable KRAV standards.

There are three categories (A, B & C) of recognition of certification and inspection bodies:

- The inspection body has an IFOAM Accreditation and remains accredited.
- The inspection body is evaluated by KRAV or an independent party recognised by KRAV. The evaluation is based on the requirements of the IFOAM Accreditation Criteria e.g. with regards to independence; objectivity; organisation structure; inspection and certification procedures etc. The recognition decision will be reviewed every second year.
- Other ways to establish credibility and trustworthiness. The recognition decision will be reviewed annually.

For all categories, an agreement is required between KRAV and the certification body. Besides fulfilling the EU Regulation, standards must also correspond either to KRAV's standards or the IFOAM Basic Standards.

3.7 The organic market in The Netherlands

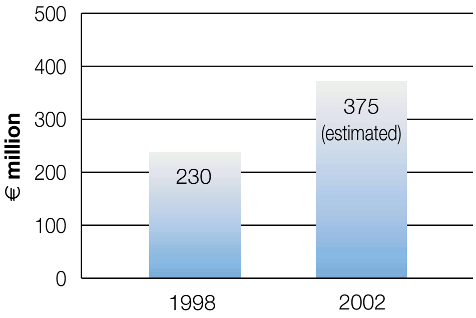
3.7.1 Market volume and potential

The Netherlands is a small and very densely populated country in which agriculture plays only a marginal role, both in terms of the area utilised and value added. Wherever agriculture is practised, it is normally very intensive. The main branches of production are fruit, vegetables, flowers and ornamental plants and cattle farming. Within the agricultural sector, organic farming plays only a modest role compared to neighbouring countries. In the 1990s, organic farming began to grow in the Netherlands – as it did in most European countries. In 2002, 1560 organic farms managed a total of 42,610 ha, corresponding to 2.2% of total farmland. Food scares and downward pressure on prices in conventional agriculture make organic farming attractive for consumers and producers alike. Since 1992, the government has provided support for converting farms. However The Ministry of Agriculture, Nature and Fisheries abolished subsidies for conversion from 1st January 2003. A government plan of action has set the goal of 10% of the area being managed to organic standards by 2010. Most Dutch organic farms are mixed operations.

In 2002 organic sales amounted to about € 375 million, while the share of organic products in the total food market figured about 1.5%. This small share is partly because distribution of organic products is relatively expensive in The Netherlands and organic products are thus often more expensive than in surrounding countries.

In The Netherlands too, market growth is driven by the supermarkets. The interest of supermarkets has grown steadily in recent years. In 2001 42.3% of the total sales of organic products was sold via supermarkets against 40.8% in whole food stores i.e. health food shops and natural food stores and 16.9% was sold through other distribution channels like bakeries, butcheries and direct selling. Most supermarket chains in The Netherlands such as Konmar, Vomar, Dekamarkt and De Nieuwe Weme sell organic products in their branches. In 1998 the

Figure 23: Organic food and beverages in The Netherlands 1998 and 2002



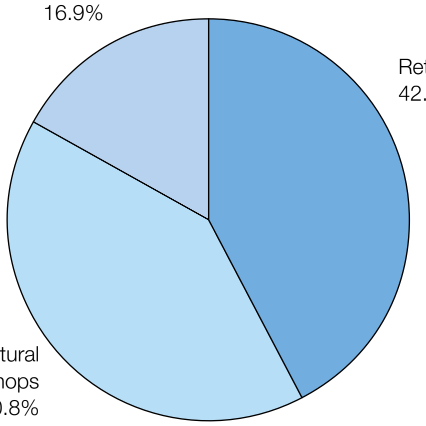
Source: Platform Biologica 2001, 2004, FiBL, 2003

Table 11: Import and export of organic agricultural food products in The Netherlands

Product group	Imports		Exports	
	Total quantity – (t)	Main countries of origin	Total quantity – (t)	Countries exporting to
Cereals	40,000	FR, UA, RO, NL	35,000	DE, UK, BE
Oilseeds	30,000	FR, AG, PY, NL	–	–
Potatoes	7,500	DE	5,500	DE, UK
Vegetables	80,000	IT, IL, ES,	130,000	DE, UK, SE, DK
Fruit (incl. nuts)	2,000	US, AG, NZ	1,600	DE, UK, AT, CH
Milk and milk products	2,500	DE	15,000	DE, UK
Beef (incl. Veal)	690	AT, DE	0	0
Sheep meat (incl. Lamb)	225	DE, GL	0	0
Pork	275	DE	430	UK, BE, AT, DE
Poultry	80	FR, NL	243	DE, BE
Eggs (million pieces)	12	NL	1	DE

Source: Omiard unpublished results, 2003

Figure 24: Sales channels for organic products in The Netherlands in 2000



Source: Richter et al., 2003

largest Dutch supermarket chain, Albert Heijn (Ahold), launched an organic label programme of its own and has since then been promoting organic sales in a targeted manner. In 2001 they organised sales offer weeks three times a year and during these periods all organic products were offered with a price reduction of 25%. In the past two years, the share of organic sales marketed through supermarkets has risen to 42.3%. The low rate of domestic supply and the expensive distribution are the largest problems in the organic market in The Netherlands. In foreign trade, in contrast, The Netherlands has been able to establish its role as an international turntable for organic produce.

3.7.2 Imports and market requirements

Imports have a central position for organic produce in The Netherlands. The major players in the organic market the supermarket chains, often have to procure organic products from abroad. On the other hand, The Netherlands is also a large exporter of organic products. This is because numerous international food processors process organic products for re-export in their branches in The Netherlands. Unprocessed organic products are also re-exported from here.

The main imported products are fresh fruits and vegetables, cereals, oil-seeds, dried fruits, nuts, seeds for planting, coffee, tea, spices and herbs. The main suppliers are the central and eastern European countries and EU member state countries. Off-season and exotic products from tropical and subtropical countries account for an ever larger share.

3.7.3 Market access provisions

Market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in the Netherlands:

In the Netherlands, EU Regulation 2092/91 is implemented through a national Decree on the Agricultural Quality of Organic Production Methods. This legislation designates the organisation Skal as the sole official body for inspection and certification pursuant to the EU Regulation in the Netherlands. In 2002, Skal was split up into two organisations: the private foundation Stichting Skal for certification of organic production in the Netherlands by order of the Ministry of Agriculture, and the private company Skal International. Skal developed private regulations for some areas that are not yet covered by the EU Regulation 2092/91.
Skal's certification mark, EKO, indicates that the product carrying it meets the requirements of the EU Regulation 2092/91. The EKO label is mainly used for products, which have been produced in the Netherlands. Only foreign producers that have signed a contract with Skal can use the EKO label – provided they produce according to the EU-regulations and meet the requirements and conditions of Skal.

Applications for import licences for organic products can be issued to the Ministry of Agriculture. For imports to The Netherlands, product-specific requirements upon quality, size and constituents must be met (for addresses see Annex IV).

3.8 The organic market in the United Kingdom

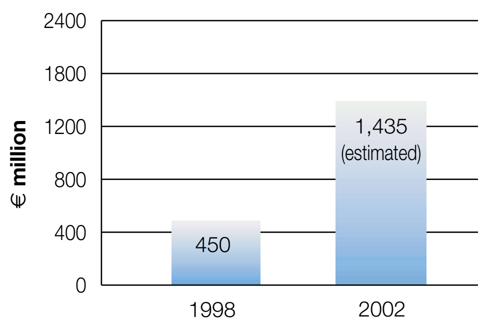
3.8.1 Market volume and potential

With the foundation of the Soil Association in 1946, organic farming has a long history in the United Kingdom (UK). However, the organic market has developed only slowly compared to other European countries in the mid 90's. This has been explained by the poor interest of British consumers and the modest financial support provided to organic farms compared to other European countries. It is only since the late 1990s that demand for organic products has risen significantly, particularly for dairy and meat products. This is due in part to the advertising efforts of the retail trade.

The British retail market growth for organic products has been one of the fastest in Europe. The retail sales in 2003 are estimated to reach upto €1750 million. Estimates of the share of organic products in the overall retail market for the year 2002 ranged between 1.5–2.0%. The main organic products are fruits, vegetables and herbs. Supermarkets today account for 80% of organic product marketing. Box schemes, involving delivery to the home, directly or by mail order of a box of fresh in-season organic fruits and vegetables, are a significant market outlet.

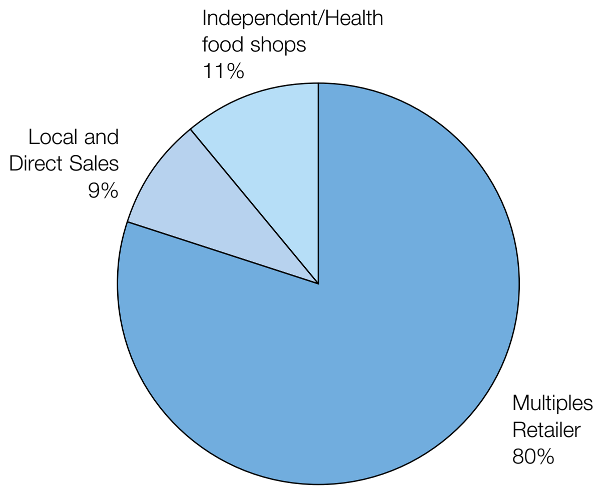
Of the 100,000 farms in the United Kingdom, 4057 (1.74% of all farms) produced according to organic standards in 2002. These organic farms managed an area of 724,523 ha, corresponding to a share of 4.2% of the total farmland area. Domestic production lags far behind demand. As 80% of the organic land is classified as grassland used for organic livestock production majority of the organic products consumed are imported.

Figure 25: Organic food and beverages in the United Kingdom 1998 and 2002



Source: Kortbech-Olesen, 1999, FiBL, 2003

Figure 26: Sales channels for organic products in the United Kingdom in 2001



Source: Richter et al., 2003

Thanks to the entry of large supermarket chains, the growth prospects of the British organic food market are good. These multiple retailers are responsible for 80% of the total organic food sales, 9% is done through local and direct sales and 11% through independent and health food shops. Experts consider annual growth in sales by 10–15% to be realistic, reaching a value of € 2.0–2.5 billion by the year 2005, which would amount to 2 to 3% of total food sales. Trade estimates even put the market share at 10 to 15% by the year 2009. The branches experiencing the strongest growth are organic fruits and vegetables, organic meat, wine, beer and processed foods. A considerable rise in the capacity of supply, of both domestic production and imports, will be a precondition to this growth.

Besides the reliability and continuity of supply, particular potential problems for the British organic market are compliance with quality requirements and pricing structures. Furthermore, organic products continue to compete with the food products of integrated production. The issue will be resolved on the market. In the United Kingdom organic products also compete with low-cost "gene food". This increases the likelihood that the premium for organic products (presently 50–55%) will come under pressure.

Despite competition on the food market, much scope will remain in future for foreign suppliers of organic products. The crucial aspects are credible certification, efficient trade structures and strong relationships with British market partners.

3.8.2 Imports and market requirements

About half of all imported organic foods come from EU member states. The main organic suppliers outside of the EU are the USA, Egypt, Israel, Argentina, South Africa and Central America. Some 70% of organic foods are imported. The import share for organic beverages (incl. wine and spirits) figures 90%, for fruits, vegetables and herbs 82%, for cereals, bakery products and baby food 70%, for juices 50% and for dairy products 40%. Tea and coffee are 100% imported.

Organic fresh fruits and vegetables have the strongest demand in the UK. Most organic imports in this sector come from EU and a group of well-established third countries. British consumers place very high demands upon the external appearance of these fresh products. They are mainly distributed by supermarket chains and box schemes. Excellent market perspectives exist for processed fruits and vegetables particularly dried, frozen and canned products. Demand for baby food and convenience products is growing rapidly too.

Meat, meat products and eggs are supplied mainly by domestic producers. Half of the domestic demand for cereal and cereal products is met by imports coming mainly from the EU and the USA. Growth is expected in the area of animal feeds due to rising demand for organic poultry, meat and eggs. Price differentials of 80 to 100% compared to conventional feedstuff cereals are (still) commonplace. Cereals for bakery products tend to be bought direct by the millers.

Supply systems are complex with much inter trading between suppliers for dried fruits and nuts. In many cases dried fruits though produced organically cannot be sold as organic products because producers are not certified.

Fair Trade organisations are not always able to sell tea and coffee with an additional organic label despite these having been cultivated organically because a part of the certification chain is missing. The future market prospects of this product group depend above all upon the commitment of the supermarket chains.

3.8.3 Market access provisions

The market access for organic products is regulated by EU Regulation 2092/91 on organic farming (see Chapter 2). The following additional provisions apply in the United Kingdom:

In 1987, the United Kingdom government designated UKROFS (United Kingdom Register of Organic Food Standards) as an executive body to oversee and approve the private certification organisations in the UK. Although UKROFS could operate as a certifying body (UK1), it only approved and monitored the activities of the private certifying bodies (e.g. interviewing and registering inspectors trained by certification bodies).

Table 12: Import of organic agricultural food products in The United Kingdom

Product group	Imports	
	Total quantity – (t)	Main countries of origin
Cereals	160,000	AT, AU, CN, Eastern Europe, FR
Oilseeds	Very small	
Potatoes	20,000	EG, ES, IT, IL, NL, DE, FR, BE
Vegetables	74,000	NL, ES, IL, IT AR, W. Africa, Chile, DK
Fruit (incl. nuts)	30,000	US, S. America, ES, NL, FR, EG, IS, GR, IT, CL, AR, NZ ZA, MX, GL
Milk and milk products	22,000	AT, DK
Beef (incl. Veal)	496	AR, DE, SW, DK
Sheep meat (incl. Lamb)	18	NZ, DE, SE
Pork	750	DE, SW, NL, DK
Poultry	700	DK, FR
Eggs (million pieces)	5	FR

Source: Omiard unpublished results, 2003

UKROFS had produced a set of official national standards and established an independent certification and inspection scheme for organic producers. UKROFS standards are based on EU standards with additional UK regulations.

In 2001, a review of UKROFS was conducted which resulted in this body being dissolved with effect from July 2003. The executive functions previously undertaken by UKROFS (e.g. approval and monitoring of organic certifiers, issue of import authorisation etc.) are now undertaken directly by the Department for Environment, Food and Rural Affairs (DEFRA), in consultation with the devolved administrations in the other countries of the United Kingdom: Scotland, Wales and Northern Ireland.

There are currently 12 private sector bodies approved and monitored by UKROFS/DEFRA in the United Kingdom. These include OF&G (Organic Farmers and Growers Ltd, UK2), Scottish Organic Producers Association (UK3), OFF (Organic Food Federation, UK4), SACert (Soil Association Certification Ltd, UK5), the Bio-dynamic Agricultural Association (UK6), Irish Organic Farmers and Grower Association (UK7) and others. Some of the certification bodies certify only to the official national standards, others developed additional private standards.

The oversight and approval of the certification bodies is now undertaken by UKAS (United Kingdom Accreditation Service). UKAS is the sole national accreditation body recognised by government to assess, against internationally agreed standards, organisations that provide certification, testing, and inspection and calibration services.

There is no national label for organic products in the United Kingdom. British supermarket chains dominate the organic market. They are known for their high quality and service standards and are widely trusted by their customers. Therefore, the word “organic” in combination with the supermarket’s brand name like Marks & Spencer Organic, Waitrose Organic, Sainsbury Organic, Tesco Organic or ASDA Organic are used in marketing. The certification service sometimes appears only with their official code-number (e.g. Organic Certification: UK4), sometimes with the certifier’s logo. Consumers accept any UKROFS/DEFRA accredited UK certification service. Supermarkets are working with various certification services depending on product and country of origin.

In the market place and by the consumer, the symbol of SACert is presently the best known and SACert labelled products currently occupy about a third of the UK organic market.

Part C: Annexes

Guidelines, Addresses, Forms

Annex I/1

The Swiss Ordinance on Organic Agriculture and on Appropriate Labelling of Plant Products and foodstuffs (short name: Bioverordnung 910.18 and 910.181). As well as the different changes made since 1997, can be downloaded in German, French and Italian from the website:

in German
http://www.admin.ch/ch/d/sr/c910_18.html
http://www.admin.ch/ch/d/sr/c910_181.html

in French
http://www.admin.ch/ch/f/rs/c910_18.html
http://www.admin.ch/ch/f/rs/c910_181.html

in Italian
http://www.admin.ch/ch/i/sr/c910_18.html
http://www.admin.ch/ch/i/sr/c910_181.html

the inoffical version can be downloaded from:

http://www.blw.admin.ch

Annex 2 of the ordinance 910.181 gives details about authorized fertilizers; Annex 3 of 910.181 gives details about authorized ingredients and technical aids; Annex 4 gives details about the country list.

Annex II

EU Council Regulation (EEC) No 2092/91 of 24 June 1991 on Organic Production of Agricultural Products and Indications Referring thereto on Agricultural Products and Foodstuffs

The EU Regulation on organic production can be downloaded at the following website: http://europa.eu.int/eur-lex/en/consleg/main/1991/en_1991R2092_index.html

This is the original – unconsolidated and consolidated – text, which has since been amended by numerous further pieces of EU legislation.
To obtain the hardcopy of the regulation outside of Europe, address yourself to the nearest European Commission Delegation, the addresses are available at:
http://europa.eu.int/comm/external_relations/delegations/intro/index.htm

Inside of Europe address yourself to the nearest European Info Center, the addresses are available at:
http://europa.eu.int/comm/offices.htm

A consolidated (but unofficial) text incorporating all amendments, which is regularly updated, is available at:
http://www.prolink.de/~hps/

As well as a text from the EU with information of general nature regarding organically grown agricultural products and foodstuffs with useful explications to the legislation, available at:
http://europa.eu.int/scadplus/leg/en/lvb/l21118.htm

http://europa.eu.int/eur-lex/pri/en/oj/dat/2001/l_243/l_24320010913en00030014.pdf
gives the EU legislation on organic products from non-EU countries.

Your Notes:

Annex III

Comparison of standards in organic agriculture

** Component of the "environmental performance record" (Ökologischer Leistungsnachweis, ÖLN: documentation of ecological services provided in tillage farming): precondition for the release of direct payments.*
*** BIO SUISSE and Migros-Bio agricultural standards are identical.*

	Minimum requirements EU Regulation on organic production 2092/91, Regulation to include livestock production 1804/99 (as from Aug. 2000)	**Minimum requirements Swiss Organic Farming Ordinance *(Bio-Verordnung: Bio-V)***	**Additional requirements of BIO SUISSE/Migros-Bio**/Demeter**
Scope of Application	– Mandatory for plant products and foods labelled with the words "organic" (in English), "biologisch" or "ökologisch" (in German), or equivalent terms	– Same as EU Regulation	– Mandatory products to be sold as meeting the standards of the BIO SUISSE *Knospe* ("bud"), Migros-Bio or Demeter organic labels
Principles	– To take into account of natural cycles and processes	– To take into account of natural cycles and processes	– Demeter: Use of biodynamic compost preparations, attention to stellar/planetary influences on planting and cropping
Prohibitions	– No utilization of synthetic chemical agents or ingredients – No utilization of genetically modified organisms or their products – No utilization of growth regulators, defoliants or herbicides – No ionizing rays or irradiated products	– Same as EU Regulation	
General Requirements	– Sectoral conversion in crop production and livestock management (no parallel production, traceability) – Annual certification including at least one inspection per year	– Whole-farm organic management (non-organic wine or fruit production permitted, in accordance with ÖLN, within the organic holding for an unlimited period of time)	– No exceptions to the principle of whole-farm organic management – 2 days mandatory training for farmers starting the process of conversion
Conversion Period	– 2 years and 3 years for perennials; may be shortened to 1 year for individual farms (if no prohibited agents utilized in the last 3 years)	– 2 years; conversion date always January 1	– Demeter: 3 years, reduced to 1 year if from BIO SUISSE to Demeter, no retro-perspective approval of farms and parcels
Conversion in Stages (step by step)	– No specific legislation	– Permitted in specific circumstances on farms with perennial speciality crops, over a period of 5 years at most	– Like Swiss Organic Ordinance. Detailed conversion plan required. No parallel production of non-organic and fully organic fields is not allowed in any case.
Environment Protection, Water Resources Protection and Animal Welfare Legislation*	– Compliance with relevant national legislation	– Mandatory	–

	Minimum requirements EU Regulation on organic production 2092/91, Regulation to include livestock production 1804/99 (as from Aug. 2000)	Minimum requirements Swiss Organic Farming Ordinance *(Bio-Verordnung: Bio-V)*	Additional requirements of BIO SUISSE/Migros-Bio**/Demeter
Crop Rotation*	– Balanced crop rotation, no specific legislation in detail (checked by national inspection and certification bodies)	– Maximum proportions in crop rotation: Cereals (except maize, oats) 66%, wheat (incl. spelt) 50%, oats 25%, maize 40%, potatoes 25%	– Min. 20% of soil improving crops (e.g. ley and/or green manures) – Except for rice, a cultivation break of at least a year must be made between two mean crops of the same variety for annual crops.
Surfaces enhancing biodiversity ("Ecological Compensation Areas")*	– No specific legislation	– 7% of agricultural area, 3.5% for horticulture holdings	– 7% of agricultural area for all holdings, min. 5% of total vegetation must be low-input grassland
Nutrient Balance *	– Even, on farms with livestock inputs from livestock limited to max. 170 kg N/ha	– Even, LBL (balance sheet of Lindau agricultural extension service) method	– Even, LU equiv. max. method, LBL method where in doubt
Soil Fertility and Soil Biological Activity	– Maintenance and improvement of soil fertility and soil biological activity by means of organic fertilizers and crop rotation	– Maintenance and improvement of soil fertility and soil biological activity – Low-impact husbandry – Promotion of biodiversity – Fodder production on the holding to be graded in correlation with manure applied and fodder utilization	– Demeter: Consideration of stellar/planetary influences in planting and cropping
Use of Fertilizers and Soil conditioners	– Only permitted fertilizers as listed in special annex II A – No sewage sludge	– Organic fertilizers from own farm wherever possible – Spreading of nutrients max. 2.5 LU equivalent per ha in prime locations – Peat only for seedling production and peat border – No use of meat, blood and bone meal as fertilisers allowed – Permitted fertilizers as listed in Annex 2 of Swiss Organic Farming Ordinance (Bio-V)	– Min. 50% of nutrients to be applied to own land _ Maximum amounts of nitrogen and phosphorus per group of crops – Export of farmyard manures only to organic holdings, import from holdings at least having "environmental performance record" (ÖLN), max. transport distance: 10 km radius (poultry manure: 20 km) – Conditioning of imported farmyard manures (if from holding with ÖLN documentation) – Fertilisers and soil conditioners only from the Swiss Research Institute of Organic Agriculture (FiBL) list of approved substances – Demeter: Use of biodynamic compost preparations with all farmyard manures at least once per year. Application of horn manure and horn silica to every crop including grassland
Crop Protection	– Pest, disease and weed control by making comprehensive use of: – Appropriate species and varieties – Appropriate crop rotations	– As per EU Regulation – List of permitted plant protection agents as in Annex 2 of Swiss Organic Farming Ordinance (Bio-V)	– Only substances from the FiBL list of approved substances

	Minimum requirements EU Regulation on organic production 2092/91, Regulation to include livestock production 1804/99 (as from Aug. 2000)	Minimum requirements Swiss Organic Farming Ordinance *(Bio-Verordnung: Bio-V)*	Additional requirements of BIO SUISSE/Migros-Bio**/Demeter
Crop Protection	– Mechanical and thermal methods – Promotion and protection of beneficial organisms – Only substances of a special list of permitted plant protection agents (Annex II B) – Use of copper: maximum 8 kg/ha on a 5 year average, from 2006 on 6 kg/ha calculated on a 5 year average – Metaldehyde and pyrethroids in traps, organic herbicides are allowed (until 31 of March 2006).	– Copper application limited to 4kg/ha – Metaldehyde and pyrethroids in traps, organic herbicides are not allowed.	– Limits for application of copper range from 1.5 kg to 4 kg per hectare per year depending on crop, e.g. 1.5 kg for apples/pears, 2 kg for berries and 4 kg for stone fruits, potatoes and wine (for grapes: calculated on a 5 year average) – Use of substances not compliant with organic standards is not permitted for commission processing – Demeter: copper not permitted in vegetable cultivation (incl. potatoes)
Seeds and Plant Propagating Material	– Seed, seedlings and vegetative propagating material must be from organic production (Transition period ends Dec 31, 2003: If proof is given that organic propagation material for an appropriate variety is not available, conventional seed may be used.) – No conventionally treated seed allowed anymore after 2004 except when required by legal national regulations – A data-base system for the availability of organic seed must be in place in each member state from 2004 on	– Seed, seedlings and vegetative propagating material must be from organic production (Transition period ends Dec 31, 2003: If proof is given that organic propagation material for an appropriate variety is not available, conventional seed may be used.)	– Vegetable and herb seedlings must be of BIO SUISSE quality (max. 5% of seedlings can be certified only to EU organic standards) – Max. 60% peat in soil mixes and propagation substrates, max. 70% peat in blocking soil (sep. regulation for horticulture) – Addition of Styromull (ground styrofoam) to soil substrates is prohibited – Compliance with BIO SUISSE seed and seedling guidelines
Vegetable Production	– No special regulations	– Soil steaming only permitted for greenhouse vegetable production and production of seedlings	– Vegetable cultivation permitted in soil only – Heating in greenhouses not to exceed 5oC (from Dec. 1 to Feb. 28) – Demeter: Mulch sheeting to cover no more than 5% total area, for speciality certain crops
Fruit and Wine Production	– No special regulations	–	– Generally year-round groundcover, – Minimum green cover in vineyards and orchards also inarid areas (minimum of 4 months) – Minimum quality standards for organic fruit
Animal Health	– No prophylactic administration of pharmacological medication or antibiotics – Medication journal to be kept – Double withdrawal period after administration of medication (max. 3 cycles of treatment)	– As per EU Regulation	– Demeter: no dehorning. no (intramammary) treatments with antibiotics for drying off

	Minimum requirements EU Regulation on organic production 2092/91, Regulation to include livestock production 1804/99 (as from Aug. 2000)	Minimum requirements Swiss Organic Farming Ordinance *(Bio-Verordnung: Bio-V)*	Additional requirements of BIO SUISSE/Migros-Bio**/Demeter
Feeding	– Use of feedstuffs from on-farm production – Feedstuffs from organic production may be bought in – Max. proportion bought-in feed from non-organic production (until 24th of August 2005, afterwards more restricted): – 10% of total intake of ruminants (organic dry matter) – 20% of total intake per category of non-ruminants – As a proportion of daily intake, 25% maximum conventional feed (dry matter) permitted – No chemical or synthetic additives or genetically modified organisms – Detailed list of approved feedstuffs	– As per EU Regulation – Obligatory FiBL/RAC/BIO SUISSE list of approved feedstuffs	– 100% conventional feeds for individual livestock categories permitted until 1.1.2001, for produce not to be sold with the BIO SUISSE *Knospe* label.
Bought-in Livestock	– A maximum of 10% of adult bovine livestock and 20% of the adult porcine, ovine and caprine livestock may be brought in, as female (nulliparous) animals, from non organic-production stockfarms per year, as replacements (when organically reared animals are not available). (Exceptions include males for breeding; herd/flock renewal after disease outbreak.)	– As per EU Regulation	–
Cattle	– Special outdoor access and housing area requirements – Tethered housing prohibited from 2010 with the exception of small farms – No fully-slatted floors – Bedded or dry and well insulated rest areas – Rearing and fattening calves in groups on litter – Embryo transfer prohibited – No use of milk powder – Min. 60% of feed as roughage – Conversion periods for bought-in conventional cattle 6 months for milk, 12 months for meat production or at least 3/4 of animal's lifetime	– Compliance with outdoor access requirements of the Swiss programme for regular outdoor management of livestock (Regelmässiger Auslauf von Nutztieren im Freien: RAUS) – Other requirements as per EU Regulation	– Cow trainers prohibited from 1.1.2002
Pigs	– Daily roughage for rearing and fattening pigs – Pasture and/or out-door access	– Compliance with RAUS outdoor access requirements – Tail-docking, nose-ringing (exception summering area) and teeth-cutting prohibited	– Outdoor access from day 24 – Bought-in piglets must be organically reared – Compliance with BIO SUISSE pig-keeping guidelines

	Minimum requirements EU Regulation on organic production 2092/91, Regulation to include livestock production 1804/99 (as from Aug. 2000)	Minimum requirements Swiss Organic Farming Ordinance *(Bio-Verordnung: Bio-V)*	Additional requirements of BIO SUISSE/Migros-Bio**/Demeter
Pigs	– Compliance with special EU requirements on outdoor access and housing area – Conversion period for bought-in conventional pigs for meat production: 6 months	– Maximum age at castration 14 days – Other regulations as per EU Regulation	
Goats and Sheep	– Compliance with special requirements on outdoor access and housing area – Conversion period for bought-in conventional livestock for meat production: 6 months	– Compliance with RAUS outdoor access requirements – No tail-docking – Other regulations as per EU Regulation	– Use of milk powder permitted for triplet births – Compliance with BIO SUISSE sheep and goat guidelines
Hens	– Compliance with special requirements on outdoor access and housing area – Floor area at least 1/3 concrete (with litter) – Laying hens: 6 hens per m^2 floor area of housing. Outdoor run 4 m^2 per hen – Max. 3000 laying hens and max. 4800 broilers per housing unit – Min. age at slaughter 81 days for chickens, where impossible, slow-growing breeds to be used – Conversion period for bought-in conventional poultry for eggs 6 weeks and for meat production 56 days (max. 3 days old)	– Compliance with RAUS outdoor access requirements – Detailed requirements on housing size, stocking density, nests, access doors, light – Laying hens: 5 hens per m^2 floor area of housing. Outdoor run 5 m^2 per hen – Broiler poultry: Outdoor run 2 m^2 per hen – No beak clipping or beak trimming/heating – Other regulations as per EU Regulation	– Max. 2000 laying hens per housing unit – Bought-in chicks must be organically reared – Compliance with BIO SUISSE laying-hen guidelines
Transport	– No special requirement	– No special requirement	– The products must be transported by land or by sea
Processing and storage	– The use of additives and processing aids is restricted for plant products. See Annex 6	– The use of additives and processing aids is restricted for plant and animal products. See Annex 6 of the Swiss Organic Ordinance	– In addition storage and processing, in particular the use of additives and processing aids as well as the processing methods must comply with the product specific directives for processing. (See www.bio-suisse.ch) – No use of synthetic ascorbic acids, colorants and natural flavours allowed. – No reconstitution of juices allowed.

FIBL/BIO SUISSE 2003

Annex IV

Swiss, European and International Addresses

This Annex lists Swiss and international addresses of trading companies, producer organizations, certification bodies and authorities. The collection makes no claim to being complete.
Annexes V and VI list further addresses.

1. International Organizations and Trade Fairs

IFOAM

Organization	Address	Telephone	Fax	E-mail/Homepage
IFOAM International Federation of Organic Agriculture Movements	c/o Ökozentrum Imsbach DE-66636 Tholey-Theley Germany	+49 - 6853 - 51 90	+49 - 6853 - 30 110	webmaster@ifoam.org www.ifoam.org

The addresses of national umbrella organizations and certification bodies can be obtained from IFOAM.

Demeter Organizations

In the year 2000, there are national Demeter associations based in 19 countries around the world. These countries are: Austria, Germany, Denmark, France, Italy, Ireland, Luxembourg, Norway, the Netherlands, Sweden, Finland, England, Switzerland, Australia, Brazil, Canada, Egypt, New Zealand and the U.S.A.
The address for Demeter Switzerland is given above. Enquiries concerning national Demeter associations can be found at www.demeter.net. Some addresses of national associations based outside the EU are:

Association	Address	Telephone	Fax	E-mail/Homepage
Bio-dynamic Farming & Gardening Ass. Inc.	PO Box 54 AUS-2454 Bellingen Australia	+61 - 2 66 55 85 51	+61 - 2 66 55 85 51	poss@midcoast.com.au
Instituto biodinâmico C.P.	321 BR-18603-970 Botucatu/SP Brasil	+55 - 148 22 50 66	+55 - 148 22 50 66	ibd@laser.com.br
The Canadian Biodynamic Alliance	255 Neva Road P.O. Box 167 BC VOR 2GO Lake Cowichan Canada	+1 - 250 749 41 99	+1 - 250 749 47 88	Octavia@telus.net
Egyptian Bio-Dynamic Association / SEKEM Farms	POB 1535 Alf Maskan 11777 ET Cairo Egypt	+20 - 2 281 88 86	+20 - 2 281 88 86	ebda@sekem.com www.sekem.com
Bio-Dynamic Farming and Gardening Assoc. N. Z.	P.O. Box 39045 Wellington Mail Centre NZ New Zealand	+64 - 4 - 589 53 66	+64 - 4 - 589 53 65	d.wright@clear.net.nz
Demeter Association Inc.	USA	+1 - 315 - 364 56 17	+1 - 315 - 364 52 24	demeter@baldcom.net

Inspection and Certification Bodies

See Annex V. A list of inspection and certification bodies accredited by IFOAM can be found at:
www.ifoam.org
Some addresses of national and international working certification bodies:

Certification Body	Country/Address	Telephone	Fax	E-mail/Homepage
SKAL	Stationsplein 5 PO Box 384 NL-8000 AJ Zwolle Netherlands	+31 - 38 - 426 81 81	+31 - 38 - 421 30 63	info@skal.com www.skal.nl
Associazione Italiana per l'Agricol-tura Biologica (AIAB)	Strada Maggiore, 29 IT-40125 Bologna Italy	+39 - 051 - 27 29 86	+39 - 051 - 23 20 11	aiab@aiab.it www.aiab.it
KRAV (Swedish Organic Agriculture Association)	PO Box 1940 S-75149 Uppsala Sweden	+46 - 18 - 101 006	+46 - 18 - 101 066	Info@krav.se www.krav.se
Farm Verified Organic, INC. (FVO)	301 5th Ave SE Medina, ND 58467 USA	+1 - 701 - 486 35 78	+1 - 701 - 486 35 80	farmvo@daktel.com www.ics-intl.com/fvo.html
GARANTIE Bio-Ecocert	50, Route du Président Kennedy Local 250, Lévis Qc, Canada	+1 - 418 - 838 69 41	+1 - 418 - 838 98 23	garantie@globetrotter.net www.garantiebio-ecocert.qc.ca
ECOCERT France	BP47F 32600 l'Isle-Jourdain France	+33 5 62073424	+33 5 62071167	info@ecocert.fr www.ecocert.fr

International Trade Fairs

Trade Fair	Contact	Address	Telephone	Fax
BIOFACH Nuremberg	Ökowelt GmbH www.biofach.de info@biofach.de	Industriestrasse 12 DE-91186 Büchenbach Germany	+49 - 91 71 - 96100	+49 - 91 71 - 4016
ANUGA – Köln – "World Food Market"	ANUGA Köln Messe www.anuga.de	Messeplatz 1 DE-50679 Köln Germany	+49 - 221 - 821 0	+49 - 221 - 821 2574
PRO SANITA	Stuttgarter Messe- und Kongressges. mbH Pro Sanita www.messe-stuttgart.de	Am Kochenhof 16 DE-70192 Stuttgart Germany	+49 - 7 11 - 2 58 90	– / –
SANA	Bologna-Italy www.sana.it			
Trade Fair for Health Food and Reformhaus Goods in Bunnik	Vakcentrum	Voorstaat 91/a 3441 CK Woerden Netherlands	+31 - 34 80 - 1 97 71	+31 - 34 80 - 2 08 01
BIOCULTURA	Vidasana	Calle Clot 39 E-08018 Barcelona Spain	+34 - 3 - 2 65 25 05	+34 - 3 - 2 65 24 45
SIAL Europe North- and South America Asia	www.sial.fr sial@sial.fr	1 rue du parc 92300 Levalloius-Perret France	+33 - 1 - 49 68 54 98	– / –

2. Switzerland

Importers

Firm	Address	Telephone	Fax	Imported Products
Andros	Ch. de la Crétaux C.P. 413 CH-1196 Gland	+41 - 22 995 08 00	+41 - 22 995 09 46	Orange juices
Agrexco Ltd.	Jungholzstr. 6 CH-8050, Zürich	+41 - 1-315 76 20	+41 - 1-315 76 70	Fruits/vegetables
Bargosa S.A.-Genève	25. rue Blavignac, CH-1227 Carouge-Genève	+41 - 22-343 71 60	+41 - 22-342 80 72	Fruits/vegetables
Barry Callebaut Sourcing AG	Sumpfstr. 3 CH-6300 Zug	+41- 41-748 72 44	+41 - 41-748 71 81	Cocoa
G. Berger AG	Hünigenstr. CH-3510 Konolfingen	+41 - 31-790 44 44	+41 - 31-790 44 45	Cereals/coffee
Bertschi Fritz AG	Rührbergstrasse 13 CH-4127 Birsfelden	+41 - 61 313 22 00	+41 - 61 313 19 49	Coffee
Biofamilia AG	Brünigstrasse 141 CH-6072 Sachseln	+41 - 41 666 25 55	+41 - 41 666 25 50	Process nuts, sugar, dried fruit into muesli
Biofarm-Genossenschaft	Postfach 18 CH-4936 Kleindietwil	+41 - 62 957 80 50		Dried fruit and nuts, sugar
Bioforce AG	Abt. Heilpflanzenanbau CH-9325 Roggwil	+41 - 71-454 61 61	+41 - 71 - 454 61 62	Herb salts, processed ve-getables, whole grain rice
Biotta AG	Pflanzbergstr. 8 CH-8274 Tägerwilen	+41 - 71-666 80 80	+41 - 71 - 666 80 81	Juices, fresh vegetables
Bio Steinmann AG	Staufferstr. 2 CH-5703 Seon	+41 - 62-769 00 69	+41 - 62 - 769 00 66	Chocolate products
Blaser Café AG	Güterstrasse 4 CH-3001 Claro	+41 - 31 380 55 55	+41 - 31 380 55 40	Coffee
Blattmann	Seestrasse 201 CH-8820 Wädenswil	+41 - 1 783 40 40	+41 - 1 783 40 00	Cereals and cereal products, oil-seeds, protein plants
Bonatura AG	Industriestrasse 7 CH-3210 Kerzers	+41 - 31 750 14 26	+41 - 31 750 14 24	Fresh fruits (raspberries)
claro AG	Byfangstrasse 19 Postfach 69 CH-2552 Orpund	+41 - 32 - 356 07 00	+41 - 32 - 356 07 01	Tea, coffee, sugar, sweeteners (muscovado)
Cretti & Co.	Hauptstr.1 CH-9434 Au	+41 - 71 744 05 05	+41 - 71 744 15 17	Cereals/coffee
Delinat AG	Kirchstr. 10 Postfach 8 CH-9326 Horn	+41 - 71 845 45 72	+41 - 71 845 45 79	Wine
DIXA AG	Stationsstr. 39a CH-9014 St. Gallen	+41 - 71-274 22 74	+41 - 71-274 22 60	Herbs/spices
Eichberg Bio AG	Eichberg 32 CH-5707 Seengen	+41 - 62 777 00 49	+41 - 62 777 02 35	Protein plants, wine, sugar, honey, coffee, cocoa, tea, cereals, oil-seeds, fresh fruits, juices, vegetables, dried fruit and nuts
Fairness Handel	Sedelstr. 32 CH-6020 Emmenbrücke	+41 - 41-268 11 22	+41 - 41-268 11 33	Fair trade produce

Firm	Address	Telephone	Fax	Imported Products
First Catering Produktion AG	Grindelstr. 11 CH-8303 Bassersdorf	+41 - 1-838 50 00	+41 - 1-838 50 01	Vegetables/fruits
Frigemo AG Production Cressier Fenaco	Rte de Neuchâtel 49 CH-2088 Cressier	+41 - 32 758 51 11	+41 - 32 757 17 38	Fresh vegetables
J. Carl Fridlin AG	Bösch 61 CH-6331 Hünenberg	+41 - 41-780 55 22	+41 - 41-780 28 08	Spices
Granosa AG	Eisenbahnstr. 41 CH-9401 Rohrschach	+41 - 718 44 98 20	+41 - 718 44 98 30	Cereals
Gugger-Guillod SA	Rte de l'Industrie 5 CH-1786 Sugiez	+41 - 26 - 673 23 73	+41 - 26 - 673 19 04	Fresh vegetables
Goldenpharm AG	Churerstr. 99 9471 Buchs 3	+41 - 81-756 55 54	+41 - 81-756 06 27	Baking products
Cantina Terra Verde	Am Wasser 55 CH-8049 Zürich	+41 - 1-342 10 00	+41 - 1-341 97 62	Organe-Vine
Georges Helfer SA	Chemin De Fontenailles CH-1196 Gland	+41 - 22-9999999	+41 - 22-9999988	Avocados
“Georges Sohn” Henauer Kaffee und Tee	Hofstr. 9 CH-8181 Höri	+41 - 1-861 17 88		Tea/coffee
Hess Import	Haldenstr. 38 CH-8142 Uitikon	+41 - 1-400 42 41	+41 - 1-400 42 42	Dried fruits
Hilcona AG	Bendererstr. 21 FL-9494 Schaan	+41 - 75 235 95 95	+41 - 75 232 02 85	Vegetables, cereals, cereal products, oil-seeds
Holzofenbäckerei Dä Hobbit	Im Tal 50 CH-8233 Bargen	+41 - 52-6531683	+41 - 52-653 17 22	Vegan specialities
Horizonti Kräuterhandel GmbH	Mittelholzerstr. 9 CH-9015 St. Gallen	+41 - 79-220 18 67/ +41 - 71-3112096	+41 - 71-311 46 17/ 2096	Spices/herbs
HPW Marketing GmbH	Neumattstr. 30 CH-5000 Aarau	+41 - 62-834 80 60	+41 - 62-834 80 61	Pineapples
Hügli Nährmittel AG	Bleichestrasse CH-9323 Steinach	+41 - 71-4472211	+41 - 71-4472994	Ready-to-serve products
IFIR Handels AG	Wengistrasse 7 CH-8026 Zürich Schweiz	+41 - 1 297 27 01	+41 - 1 297 27 02	Cereals and cereal products, oil-seeds, protein plants
Jojoba Gold	Atlantis Center. C.P. 21 1628 Vuadens	+41 - 26-912 50 50	+41 - 26-912 50 11	Cosmetics/oils
Kentaur AG	Gässli 6 3432 Lützelflüh	+41 - 34-460 61 11	+41 - 34-460 61 66	Cereals/seeds
Knoll Naturproduktehandel GmbH	Talackerstrasse 14 CH-8274 Tägerwilen	+41 - 71 669 23 01	+41 - 71 669 22 34	'Brottrunk', a health drink made of fermented bread
Lendi	Erboristi CH-6981 Bedigliora Schweiz	+41 - 91 - 606 71 70	+41 - 91 - 606 34 91	Culinary and medicinal herbs, tea
Lohit AG Sharma Mahesh	Eisengasse 12 CH-6004 Luzern	+41 - 41-410 73 06	+41 - 41-410 76 08	Organic tea marketing
Maestrani Schweizeri-sche Schokoladen AG	St. Georgenstr. 105 Postfach CH-9011 St. Gallen	+41 - 71 228 38 11	+41 - 71 228 38 00	Cocoa
Mavena AG	Birkenweg 1-8 CH-3123 Belp	+41 - 31 - 818 55 88	+41 - 31 - 818 55 90	Cereals, cereal products, protein plants, pumpkin seeds for baby food

Firm	Address	Telephone	Fax	Imported Products
Max Schwarz AG Villigen	Hauptstr. 49 CH-5234 Villigen	+41 - 56 297 87 87	+41 - 56 297 87 02	Transplants/seedlings
René Meier Früchte + Gemüse	Amriswilerstrasse 36 CH-8589 Sitterdorf	+41 - 71 422 15 16	+41 - 71-422 49 76	Vegetables/fruits
Morga AG	Kapplerstr. 60 CH-9642 Ebnat-Kappel	+41 - 71-992 60 40	+41 - 71-992 60 56	Health food products
Multi Extrakt AG	Sägestr.11 CH-3550 Langnau i. E.	+41 - 34-402 22 94	+41 - 34-402 56 22	Cereals/seeds
Narimpex AG	Schwanengasse 47 CH-2503 Biel	+41 - 32 366 62 62	+41 - 32 366 62 66	Honey
Nestlé Suisse SA	rue d'Entre-Deux-Villes 10 CH-1800 Vevey	+41 - 21-924 31 11	+41 - 21-924 30 19	Foods for children
Obipektin AG	Industriestr. 8 CH-9220 Bischofszell	+41 - 71-424 73 00	+41 - 71-424 73 90	Fruit extracts
Oleificio Sabo	Via Cantonale (Casella postale) CH-6928 Manno	+41 - 91-610 70 50	+41 - 91 - 610 70 69	Oil-seeds
Perrenoud SA	Rue de l'Anel 1 CH-2112 Motiers	+41 - 32 861 14 45	+41 - 32 861 28 66	Wine
Phag sarl	La Ligniere Case postale CH-1196 Gland	+41 - 22-364 11 18	+41 - 22-364 53 63	Health food products
PRONATEC AG	Stregackerstr. 6 CH-8404 Winterthur	+41 - 52 234 09 09	+41 - 52 235 09 19	Sugar and sweeteners (agave syrup), cocoa, vanilla
Rimuss-Kellerei Rahm & Co.	Dickistr. 1 CH-8215 Hallau (SH)	+41 - 52-681 31 44	+41 - 52-681 40 14	Wine/juice
Bernhard Rothfos Intercafe AG	Postfach 1357 Bahnhofstr. 22 CH-6301 Zug	+41 - 41-728 72 60	0+41 - 41-728 72 79	Coffee
Sanbro Produkte	CH-7417 Trans	+41 - 81-6301020	+41 - 81-6301021	Sea buckthorn
Schläppi & Co.	Stationsstr. 1 CH-3076 Worb 2	+41 - 31-839 22 05	+41 - 31-839 90 45	Dried fruits
Alex Schönenberger & Co.	Konstanzerstr. 9 CH-9512 Rossrüti	+41 - 71-911 41 33	+41 - 71-911 41 35	Concentrates
s'Lotusblüemli	Sagmattstr. 7 CH-4710 Balsthal	+41 - 62-391 00 80	+41 - 62-391 00 80/02	Health food products
Somona GmbH	Bodenackerstr. 51 CH-4657 Dulliken	+41 - 62-295 46 46	+41 - 62-2953259	Health food products
Soyana Walter Dänzer	Turmstr. 6 CH-8952 Schlieren	+41 - 1-731 12 00	+41 - 1-731 12 75	Vegan specialities
Stettler Gewürzspezialitäten	Hauptstr. 13 CH-9562 Märwil	+41 - 71-655 15 34	+41 - 71-655 15 55	Spices/herbs
Molkerei Studer + Co. Damalis AG	Triemenhof. Höhenstr. 111 CH-8340 Hinwil	+41 - 1-938 18 08	+41 - 1-938 18 08	Cheese
Dünner Dr. AG	Hausenstr. 35–37 CH-9533 Kirchberg	+41 - 71 932 61 11	+41 - 71 931 41 91	Medicinal products
Träubler Alois AG	Industriestrasse 28 CH-8304 Wallisellen	+41 - 1 877 60 60	+41 - 1 877 60 66	Coffee

Firm	Address	Telephone	Fax	Imported Products
Trawosa AG	Eisenbahnstr. 41 CH-9401 Rohrschach	+41 - 71-844 98 40	+41 - 71-844 98 49	Cereals, rice, beans, dried, fruits + vegetables, herbs, fruits concentrates
Unipektin AG	Bahnhofstr. 9 CH-8264 Eschenz	+41 - 52-742 31 31	+41 - 52-742 31 32	Concentrates
Vanadis AG	Staufferstr. 2 CH-5703 Seon	+41 - 62 769 00 33	+41 - 62 769 00 44	Health food products
Varistor AG	Weststrasse 5 CH-5426 Lengnau	+41 - 56 266 50 60	+41 - 56 266 50 70	Processed vegetables, dried fruit and nuts, culinary and medicinal herbs, tea
Via Verde	Brunnmatt CH-6264 Pfaffnau	+41 - 62 - 747 07 47	+41 - 62 - 747 07 37	Fresh fruit, juices, vegetables, dried fruit and nuts, sugar, honey, wine, oil-seeds, cereals, cereal products, culinary and medicinal herbs
W. Kündig & Cie	Stampfenbachstr. 38 P.O. Box 6784 CH-8023 Zürich	+41 - 1 368 25 25	+41 - 1 362 84 14	Cereals and cereal products, protein plants
Weber & Hermann	Zürcherstrasse CH-8903 Birmensdorf	+41 - 1 737 03 50	+41 - 1 737 33 60	– / –
Weleda AG – Betrieb Weiden	Stollenrain 11 CH-4144 Arlesheim	+41 - 61-705 21 21	+41 - 61-705 23 11	Medicinal products
Weinhandlung am Küferweg AG	Küferweg 3 CH-8912 Obfelden	+41 - 1 761 33 33	+41 - 1 761 14 33	Wine

Supermarket Chains

Chain	Address	Telephone	Fax	E-mail/Homepage
Migros Genossenschafts-Bund	Limmatstrasse 152 CH-8005 Zürich	+41 - 1 - 277 2111	+41 - 1 - 277 2333/ 277 2525	www.migros.ch www.miosphere.com
Coop (Schweiz)	Thiersteinerallee 12 CH-4002 Basel	+41 - 61 - 336 6666	+41 - 61 - 336 7491	www.coop.ch
Bon appétit Management AG	Industriestrasse 25 CH-8604 Volketswil	+41 - 1 - 947 14 14	+41 - 1 - 945 05 60	www.bon-appetit.ch
Manor AG Hauptsitz	Rebgasse 34 CH-4058 Basel	+41 - 61 - 686 11 11	+41 - 61 - 681 11 92	www.manor.ch

Catering

Company	Address	Telephone	Fax	E-mail/Homepage
Gate Gourmet – Zürich AG Borddienststr.	CH-8058 Zürich-Flughafen	+41 - 1 - 812 19 19	+41 - 1 - 812 91 92	www.gategourmet.ch

Agricultural Associations

Agricultural Association	Address	Telephone	Fax	E-mail/Homepage
Demeter Schweiz (association for bio-dynamic agriculture)	Stollenrainstr. 10c CH-4110 Arlesheim	+41 - 61 - 706 96 43	+41 - 61 - 706 96 44	info@demeter.ch www.demeter.ch
BIO SUISSE (ASOAO)	Margarethenstr. 87 CH-4053 Basel	+41 - 61 385 96 10	+41 - 61 385 96 11	bio@bio-suisse.ch www.bio-suisse.ch
Bioterra (Swiss association for organic agriculture)	Dubsstrasse 33 CH-8003 Zürich	+41 - 1 - 463 55 14	+41 - 1 - 463 48 49	service@bioterra.ch www.bioterra.ch

Advisory Bodies

Advisory Body	Address	Telephone	Fax	E-mail/Homepage
FiBL (Research Institute of Organic Agriculture)	Ackerstrasse Postfach CH-5070 Frick	+ 41 - 62 - 865 72 72	+ 41 - 62 - 865 72 73	admin@fibl.ch www.fibl.org
SIPPO – Swiss Import Promotion Programme	Stampfenbachstr. 85 PO BOX 492 CH-8035 Zürich	+41 - 1 - 365 52 00	+41 - 1 - 365 52 02	info@sippo.ch www.sippo.ch

Government Bodies

Government Body	Address	Telephone	Fax	E-mail/Homepage
Swiss Federal Office for Agriculture	Mattenhofstrasse 5 CH-3003 Bern	+41 - 31 - 322 25 11	+41 - 31 - 322 26 34	www.blw.admin.ch
Swiss Federal Office for Public Health	Schwarzenburgstr. 165 CH-3097 Liebefeld	+41 - 31 - 322 21 11	+41 - 31 - 322 95 07	www.bag.admin.ch
Swiss Federal Customs Administration	Oberzolldirektion Monbijoustr. 40 CH-3003 Bern	+41 - 31 322 65 11	+41 - 31 322 78 72	www.zoll.admin.ch
Swiss Federal Statistical Office	CH-3000 Bern	+41 - 31 323 60 11	+41 - 31 323 60 12	www.statistik.admin.ch

Label Programmes and Certification Bodies

Certification Body	Address	Telephone	Fax	E-mail/Homepage
IMO Institut für Marktökologie	Weststr. 51 CH-8570 Weinfelden	+41 - 71 - 626 06 26	+41 - 71 - 626 06 23	office@imo.ch www.imo.ch
bio.inspecta AG	Ackerstrasse Postfach CH-5070 Frick	+41 - 62 - 865 63 00	+41 - 62 - 865 63 01	admin@inspecta.ch www.bio.inspecta.ch
SQS Schweizerische Vereini-gung für Qualitäts- und Management-Systeme	Bernstr. 103 CH-3052 Zollikofen	+41 - 31 910 35 35	+41 - 31 910 35 45	headoffice@sqs.ch www.sqs.ch
Bio Test Agro AG	Im Grüttstr. 10 CH-3475 Riedtwil	+41 - 62 - 968 19 77	+41 - 62 - 968 19 80	info@bio-test-agro.ch www.bio-test-agro.ch

3. Austria

Wholesalers, Retailer

Firm	Organic Range
BILLA Supermarket (belonging to REWE Group) IZ NÖ Süd Str. 3 Obj. 16 AT-2355 Wr. Neudorf Tel.: +43 2236 600 6930 Fax: +43 2236 600 7690 thomas.rogy@billa.co.at www.billa.at	(department fruits and vegetables)
SPAR Supermarket Group Taborstr. 95 AT-1200 Vienna Tel.: +43 1 3300539 726 Fax: +43 1 3303322 harald.rauchegger@spar.co.at www.spar.at	(department fruits and vegetables)

Importer

Firm	Organic Range
Johann Ischia & Co Im- und Exportgesellschaft GmbH & Co Amraserstr. 6 AT-6020 Innsbruck/Tirol Tel.: +43 512 52015-0 Fax: +43 512 52015-15	
Obst Huber Fruchtimport GESMBH Neinergutstr. 28–30 AT-4600 Wels Tel.: +43 7242 404-0 Fax: +43 7242 404-147	

Import Firms Specialized in Organic Products

Firm	Organic Range
Al Naturkost Schulgasse 35 AT-2542 Kottingbrunn Tel.: +43 2252 77218	
Natürlich Weber AT-3932 Kirchberg/Walde 52 Tel.: +43 2854 20417 Fax: +43 2854 631016 office@weber-austria.at	

Organic Certification Bodies

ABG Austria Bio Garantie
Königbrunnerstr 8
AT-2202 Enzersfeld
Tel.: +43 2262 672212
Fax: +43 2262 674143
nw@abg.at

BIOS Biokontrollservice
Feyregg 39
AT-4552 Wartberg
Tel.: +43 7587 7177 14
Fax: +43 7587 7177 11

LACON
AT-4122 Arnreit 13
Tel.: +43 7282 7711
Fax: +43 7282 7711 4

Lebensmittelversuchsanstalt
Blaasstr. 29
AT-1190 Vienna
Tel.: +43 1 3688555
Fax: +43 1 3688555 20

SGS Austria Controll & Co
Ges.m.b.H.
Johannesgasse 14
AT-1015 Vienna
Tel.: +43 1 5122567
Fax: +43 1 5122567 9

Government bodies

AMA Marketing GmbH
Pasettistraße 64
AT-1200 Vienna
Tel.: +43 1 33 151 – 0
Fax: +43 1 33 151 – 499
QM-Programme@ama.gv.at

Bio Ernte Austria – Bundesbüro
Europaplatz 4
AT-4020 Linz
Tel.: +43 0 732 654 884
Fax: +43 0 732 654 884 – 40
bio@ernte.at
www.ernte.at

4. Denmark

Importers

Firm	Organic Range
Urtekram A/S Klostermarken 20 DK-9550 Mariager Tel.: +45-98 54 22 88 Fax: +45-98 54 23 33 urtekram@inet.uni2.dk www.urtekram.dk	Dried fruit and nuts, herbs and spices, cereal products (incl. breakfast cereals, biscuits, pasta, rice), vegetable oils (incl. olive oil) and culinary vinegars, tea, beans, lentils, sugar and other sweeteners, wine, cosmetics
Unikost A/S Over Hadstenvej 82 DK-8370 Hadsten Tel.: +45-70 22 20 46 Fax: +45-86 98 00 48 jan@jan-import.dk www.jan-import.dk	Dried fruit and nuts, pasta, rice, seeds, sugar, grains and flour
Bio Trading A/S Abenravej 9 Kiskelund DK-6340 Kruså Tel.: +45-70 23 15 15 Fax: +45-70 23 15 16 bio@bio-trading.com www.biotrading.dk	Sugar, malt, starch, eggs and powdered egg, seeds, dried fruit and nuts, cocoa and chocolate, fats and vegetable oils, spices, processed fruit (jams, marmalades and jellies)
U-landsimporten Rolstrupbakken 6 DK-7900 Nykobing Mors Tel.: +45-97 72 57 88 Fax: +45-97 72 53 54 u-landsimporten@vip.cybercity.dk	Coffee, tea and cocoa
Sunprojuice Denmark AS Huginsvej 2-4 DK-4100 Ringsted Tel.: +45-57 67 11 77 Fax: +45-57 67 1145 sunpro@post4.tele.dk www.ecoweb.dk/sunprojuice	Processed fruits

Food and Beverage Manufacturers

Firm	Organic Range
Drabæks Mølle A/S Ostparken 1-5 DK-6640 Lunderskov Tel.: +45-75 58 52 66 Fax: +45-75 58 58 30 dml@post3.tele.dk	Cereal products
Nutana A/S Ringstedvej 531 DK-4632 Bjaeveskov Tel.: +45-56 86 96 00 Fax: +45-56 86 96 16	Juices, spreads, baked beans, chilli beans, deep-frozen ready-meals, deep-frozen vegetables, muesli, rice, pasta, beans, seeds, grains, flour and fruit
Svansø Food A/S Ronnevej 24 DK-5580 Norre-Aaby Tel.: +45-63 31 44 00 Fax: +45-63 31 41 17 svansoe@svansoe.com	Jams and marmalades, pasta, olive oil, deep-frozen fruits and vegetables
Schulstad Brød A/S Hammerholmen 21-31 DK-2650 Hvidovre Tel.: +45-36 39 71 00 Fax: +45-36 39 71 71	Bread and bakery products
Mølle Skovly Lyngvej 21, Skringstrup DK-8832 Skals Tel.: +45-86 69 49 66 Fax: +45-86 69 50 86 info@molle-skovly.dk www.molle-skovly.dk	Chocolate, natural confectionery
Natur Frisk Brewery Ltd. Lillehoejvej 18 DK-8600 Silkeborg Tel.: +45-86 80 37 67 Fax: +45-86 80 24 55	Fruit juices

Wholesalers and Mass-Market Retail Chains

FDB (COOP DENMARK)
Roskildevej 65
DK-2620 Albertslund
Tel.: +45-43 86 43 86; +45-43 86 48 11
Fax: +45-43 86 42 09; +45-43 86 33 86
fdb@fdb.dk
www.fdb.dk

IRMA A/S
Korsdalsvej 101
DK-2610 Rodovre
Tel.: +45-43 86 38 22
Fax: +45-43 86 38 09

Dansk Supermarked A/S
Bjodstrup 18
DK-8270 Hojbjerg
Tel.: +45-89 30 30 30
Fax: +45-86 27 65 63

DAGROFA A/S
Gammelager 11-13
DK-2605 Brondby
Tel.: +45-43 22 82 82
Fax: +45-43 22 84 04

MATAS A/S
Rormosevej 1
DK-3450 Allerod
Tel.: +45-48 16 55 55
Fax: +45-48 16 55 66
www.matas.dk/OKOLOGI.HTM

ISO SUPERMARKED
Vermlandsgade 51
DK-2300 Copenhagen S
Tel.: +45-31548411; +45-32 69 76 00
Fax: +45-31 54 3142; +45-32 69 76 01
iso@iso.dk
www.iso.dk

Government Bodies

The Danish Veterinary and Food Administration
Mørkhøj Bygade 19
DK-2860 Søborg
Tel.: +45-33 95 60 00
Fax: +45-33 95 60 01
foedevaredirektoratet@fvd.dk
www.foedevaredirektoratet.dk

The Plant Directorate
Skovbrynet 20
DK-2800 Lyngby
Tel.: +45-45 26 36 00
Fax: +45-45 26 36 10
pdir@pdir.dk
www.plantedir.dk

Danish Import Promotion Office for Products from Developing Countries (DIPO)
Danish Chamber of Commerce Borsen
DK-1217 Copenhagen K
Tel.: +45-33 95 05 00
Fax: +45-3120525

The Danish Ministry of Food, Agriculture and Fisheries, Department Organic Farming
Holbergsgade 2
DK-1057 Copenhagen K
Tel.: +45-33 92 33 01
Fax: +45-33 14 50 42
fvm@fvm.dk
www.fvm.dk

Label Programmes and Certification Bodies

Demeterforbundet (The Demeter Association)
Birkum Bygade 20
DK-5220 Odense SO
Tel.: +45-65 97 30 50
Fax: +45-65 97 30 50

Det Okologiske Fodevaredd (The Organic Food Council), Strukturdirektoratet Udvikiingskontoret
Toldbodgade 29
DK-1253 Kobenhavn K
Tel.: +45-33 63 73 00
Fax: +45-33 63 73 33

Infood
Langballevaenget 102
DK-8320 Marslet
Tel.: +45-86 12 86 38
Fax: +45-86 12 86 37
infood@post8.tele.dk
www.ecoweb.dkfinfood

Landsforeningen Okologisk Jordbrug (LOJ) (The Danish Association for Organic Farming) Okologiens Hus
Frederiksgade 72
DK-8000 Arhus C
Tel.: +45-87 32 27 00
Fax: +45-87 32 27 10
ecojord@ecoweb.dk
www.ecoweb.dk/oekoland

Max Havelaar Fonderen c/o Folkekirkens Nodhjaelp
Norregade 13
DK-1165 Copenhagen K
Tel.: +45-33 11 13 45
Fax: +45-33 11 13 47
maxhavelaar@dk
www.maxhavelaar.dk

Ogruppen – Dansk, Okologileverandorforening
Udgarden 30
Lading
DK-8471 Sabro
Tel.: +45 86 12 77 66
Fax: +45 86 12 77 41
gruppen@ecoweb.dk
www.ecoweb.dk/gruppen/

Okologisk Landscenter (OLC), (The Danish Organic Service Centre) Okologiens Hus
Frederiksgade 72
DK-8000 Arhus C
Tel.: +45-87 32 27 00
Fax: +45-87 32 27 10
ecoinfo@ecoweb.dk
www.ecoweb.dk/ecoinfo

5. France

Importers

Firm	Organic Range
Arcadie SA 1115 route d'Uzès FR-30100 Alès Tel.. +33-4 66 56 99 33 Fax: +33-4 66 30 62 611	Spices, fresh and dried culinary herbs, dried vegetables, herbal teas
Bioprim 530 Av. de Milan ZI du Grand Saint Charles FR-66000 Perpignan Tel.: +33-4 68 54 79 79 Fax: +33-4 68 54 57 68 contact@bioprim.com	Fruit and vegetables
Dynamis France 54 avenue de la Vilette FR-94637 Rungis Cedex Tel.: +33-145 60 43 44 Fax: +33-146 87 44 05	Fresh fruit and vegetables
Euro Breizh 8 rue des Martyrs FR-29270 Carhaix-Plouguer Tel.: +33-2 98 99 25 20 Fax: +33-2 98 99 25 21	Cereals and leguminous vegetables
Exodom 28, rue Jules Carteret FR-69007 Lyon Tel.: +33-4 37 28 73 50 Fax: +33-4 37 28 73 54 www.exodom.fr	Exotic fruit and vegetables, fruit juices, dried fruit, cocoa and coffee
Fimex 10 rue du Perche FR-75003 Paris Tel.: +33-148 04 54 07 Fax: +33-142 7183 84	Tea
IMAGO Marché St. Charles BP 5129 FR-66031 Perpignan Tel.: +33-4 68 68 40 40 Fax: +33-4 48 68 40 48	Fruits and vegetables
JK Nature (ZI La Saussaye) 124 rue du Rond d'Eau FR-45590 Orléans Tel.: +33-2 38 25 00 70 Fax. +33-2 38 25 00 702	Fruits and vegetables
Les Rois Mages 210 rue Louis Arnaud FR-13794 Aix-en-Provence Cedex 3 Tel.: +33-4 42 24 42 57 Fax: +33-4 42 24 36 62	Tea and coffee
Pimpexport 103 boulevard Mac Donald FR-75019 Paris Tel.: +33-145 9105 88 Fax: +33-145 9105 78	Teas, culinary herbs, herbal tea plants, plant extracts, spices

Firm	Organic Range
Pronatura MIN 68 FR-84953 Cavaillon Cedex Tel.: +33-4 90 78 73 04 Fax: +33-4 90 78 73 14	Fruits and vegetables esp. citrus fruits, dried fruit
René Devalance Domaine de Choisel FR-51120 Queudes Tel.: +33-3 26 80 53 85 Fax: +33-3 26 81 35 02	Cereals, flour, vegetable oils, dried leguminous vegetables, oil-seeds, oil-seed and vegetable protein products, salts, semolina, rice, canned foods
Sté Arcada France Domaine du Blazy FR-47130 Port-Sainte-Made Tel.: +33-5 53 87 20 24 Fax. +33-5 53 87 26 18 arcada@ins.France.com	Fruits and vegetables

Processors and Packers

Firm	Organic Range
BIO Planète Sarl Route de Limoux FR-11150 Bram Tel.: +33-4 68 76 70 60 Fax: +33-4 68 76 70 69 info@bioplanete.com www.bioplanete.com	Culinary oils
Celnat ZI de Blavozy FR-43700 Saint-Germain-Laprade Tel.: +33-4 71 03 04 14 Fax: +33-4 71 03 54 31	Cereals, cereal products, tea
Distriborg France 217 chemin du Grand Revoyet FR-69230 St-Genis-Laval Lyon Tel.: +33-4 72 67 10 20 Fax: +33-4 72 67 10 57	Extensive range
Florame 34 boulevard Mirabeau FR-13210 Saint-Rémy-de-Provence Tel.: +33-4 90 92 48 70 Fax: +33-4 90 92 48 80	Oils
Le Goût de la Vie s. a. 83 boulevard Montparnasse FR-75006 Paris Tel.: +33-1 53 63 24 70 Fax: +33-1 53 63 24 71 vscherrer@legoutdelavie.com www.legoutdelavie.com	Dried products and dairy products
Markal ZA Les Plaines FR-26320 St-Marcel-lès-Valence Tel.: +33-4 75 58 72 20 Fax: +33-4 75 58 90 30	Cereals, cereal products, rice, grains, leguminous vegetables
Nutrition et Soja-Soy Chemin de l'Horte FR-31250 Revel Tel.: +33-5 62 18 72 50 Fax: +33-5 62 18 72 51	Soya products

Firm	Biosortiment
Sté Bio d'Armor La Croix Rouge Ergué – Gabéric FR-29556 Quimper Cedex 9 Tel.: +33-2 98 59 58 00 Fax: +33-2 98 59 69 99	Fresh products and dried products
Blédina SA BP 432 FR-69654 Villefranche-sur-Saône Cedex Tel.: +33-4 74 62 63 64 Fax: +33-4 74 62 61 96	Spices, bakery products, pasta, rice, biscuits, ready-to-serve meals, sauces, juices, herbal teas, coffee, breakfast foods, flour
Sté Bonneterre (Group Distriborg) 1 place des Planteurs FR-94538 Rungis Cedex Tel.: +33-1 49 78 25 00 Fax: +33-1 46 87 91 68	Dairy products, fresh fruit and vegetables, cereals, vegetable oils, flour, jams and marmalades, dried fruit

Retail

Supermarket Chains	Organic Range
Carrefour BP 75 Zae de Saint Guiénault 1 rue Jean Mermoz FR-91002 Evry Cedex Tel.: +33-160 91 37 37 Fax: +33-160 79 44 98 www.carrefour.fr	Fruit, vegetables, milk, dried products
Auchan Centrale d'achats 200 rue de la Recherche FR-59656 Villeneuve-d'Ascq Cedex Tel.: +33-3 28 37 67 00 Fax: +33-3 20 67 55 20 pfrisch@auchan.com www.auchan.com	Meat, bread, milk, convenience foods
Monoprix 3 rue Paul Cezanne FR-75008 Paris Tel.: +33-140 75 11 16 Fax: +33-140 75 11 16	Milk, dried products

Health Food and Organic Stores	Organic Range
La Vie Claire (Group Distriborg – 120 shops) 35 avenue du 1er mai FR-91127 Palaiseau Cedex Tel.: +33-164 53 83 00 Fax: +33-1 64 53 83 01	Complete range carried in small retail outlets
Biocoop 22 cours Gambetta FR-65000 Tarbes Tel.: +33-5 62 34 10 37 Fax: +33-5 62 34 11 69	Complete range carried in small retail outlets (180 branches)

Food Processors

Firm	Organic Range
Distriborg France 217 chemin du Grand Revoyet FR-69230 St-Genis-Laval Lyon Tel.: +33-4 72 67 10 20 Fax: +33-4 72 67 10 57	Complete range under the Distriborg brand
Le Gout de la Vie 83 boulevard Montparnasse FR-75006 Paris Tel.: +33-1 53 63 24 70 Fax: +33-1 53 63 24 71 vscherrer@legoutdelavie.com www.legoutdelavie.com	Fresh products, bread, dried and deep-frozen products

Government Bodies

- **Ministère de l'agriculture, de la pêche et de l'alimentation**
  (Ministry of Agriculture, Fisheries and Food)
  30 rue Las Cases
  FR-75340 Paris Cedex 07
  Tel.: +33-149 55 56 63
  Fax: +33-149 55 56 01

- **Direction générale de l'alimentation**
  Bureau des labels et des certifications de produits
  175 rue du Chevaleret
  FR-75013 Paris
  Tel.: +33-1 45 84 13 13

- **Ministère de l'économie, des finances et de l'industrie**
  rue de Beroy
  Télédoc 151
  FR-75572 Paris Cedex 12
  Tel.: +33-1 40 04 04 04
  Fax: +33-1 53 18 36 40

- **Ministère de l'Agriculture et de la Pêche**
  3, rue Barbet de Jouy
  FR-75349 Paris 07 SP
  Tel.: +33-1 49 55 81 01
  Fax: +33-1 49 55 57 85
  info@agriculture.gouv.fr
  www.agriculturebio.com

Label Programmes and Certification Bodies

- **AFAQ-ASCERT International**
  116 avenue Adstride Briand
  BP 83
  FR-92225 Bagneaux Cedex
  Tel.: +33-1 46 15 70 60
  Fax: +33-1 46 15 70 69

- **COFRAC**
  37 rue de Lyon
  FR-75012 Paris
  Tel.: +33-1 44 68 82 58
  Fax: +33-1 44 68 82 48

- **ECOCERT S.A.**
  BP 47
  FR-32600 L'Isle-Jourdain
  Tel.: +33-5 62 07 34 24
  Fax: +33-5 62 07 1167
  ecocert@compuserve.com
  www.ecocert.fr

- **QNPC**
  (Qualité Nord-Pas-de-Calais)
  241 avenue de la République
  FR-59110 La Madeleine
  Tel.: +33-3 28 38 94 84
  Fax: +33-3 28 38 90 87

- **Qualité France**
  18, rue Volney
  FR-75002 Paris
  Tel.: +33-1 42 61 58 23
  Fax: +33-1 42 60 51 61

6. Germany

Traders, Importers, Packers, Processors and Wholesalers

Firm	Organic Range
Rapunzel Naturkost AG Haldergasse 9 DE-87764 Legau Tel.: +49-8330 910 124 Fax: +49-8330 910 188 project@rapunzel.de	Nuts and nut-based spreads, dried fruits, cereals and cereal products, sugar, cocoa, chocolate, pasta, tomato products, vegetable oils and fats, biscuits, coffee, vanilla, ice cream and deep-frozen products
Dennree Versorgungs GmbH Hofer Str.11 DE-95183 Topen Tel.: +49-9295 180 Fax: +49-9295 18-101 zentrale@dennree.de	Full range; incl. dairy products, fresh fruit and vegetables
Delvena Lebensmittelkontor GmbH Linnicher Strasse 48 DE-50933 Köln Tel.: +49-221 498 0491 Fax: +49-221498 0399	Dried products, dairy products
Alnatura Produktions- und Handels GmbH Darmstädter Strasse 3 DE-64404 Bickenbach Tel.: +49-257 93 220 Fax: +49-6257 932 244 Alnatura@t-online.de	Dried products
Auris Naturkost Vertriebs GmbH Parallelweg 12 DE-28219 Bremen Tel.: +49-421 382 041	Extensive range
Rila Feinkost-Importe Hinterm Teich 5 DE-32351 Sternwede-Levern Tel.: +49-5745 9450 Fax: +49-5745 945 139	Extensive range
Lehmann Natur GmbH Am Churkamp 20 DE-47059 Duisburg Tel.: +49-203 932 55 11 Fax: +49-203 932 55 99 Lehmann-Natur@t-online.de	Fruits, vegetables
Naturkost Schramm Ludwig-Winter-Str 6 DE-77767 Appenweier Tel.: +49-7805-96680 Fax: +49-7805-966880 team@naturkost-schramm.de	Extensive range
Landlinie Lebensmittel-Vertrieb GmbH & CO KG An der Hasenkaule 24 DE-50354 Hürth-Kalscheuren Tel.: +49-2233 974510 Fax: +49-2233 9745199	Fresh products
Ernst Weber Naturkost Kontorhaus 1 Büro 522-524a DE-81371 München Tel.: +49-89 746 3420 Fax: +49-89 746 34222 weberNK@t-online.de	Dates, seeds, tea, juices, other products

Firm	Organic Range
Hipp-Werk Münchener Str. 58 DE-85276 Pfaffenhofen a.d. Ilm Tel.: +49-8441 757 481 Fax: +49-8441 757 492	Jars of organic purée, baby food, fresh produce (carrots, potatoes, onions, apples, lemons, oranges and kiwi fruit)
Care Naturkost GmbH & CO KG Rudolf-Diesel-Str. 30 DE-28876 Oyten Tel.: +49-4207 914 444 Fax: +49-4207 7185	Grains, seeds, dried fruit, nuts
Grüner Punkt Naturkost GmbH Schwanenkirchnerstr. 28 DE-94491 Hengersberg Tel.: +49-9901 1842 Fax: +49-9901 1875 streit@bayemwald.com	Processed fruits
Georg Rösner Vertriebs GmbH Regensburger Str. 32 DE-94315 Straubing Tel.: +49-9421 23619 Fax: +49-9421 81736	Nuts, seeds, cereal flakes, dried fruit
Übelhör KG Friesenhofen-Bahnhof 23-25 DE-88297 Leutkirch Tel.: +49-7567 820 Fax: +49-7567 834 uebelhoer@t-online.de	Cereals, leguminous vegetables, nuts, dried fruit, sweeteners
Gepa GmbH Bruch 4 DE-42279 Wuppertal Tel.: +49-202 266 830 Fax: +49-202 266 8310	Coffee, tea, honey, chocolate, nuts, rice, further products
Mühldorfer Naturkornmühle GmbH (Prima Vera) Mühlenstrasse 15 DE-84453 Mühldorf Tel.: +49-863 137 730 Fax: +49-863 137 7349 info@prima-vera.de	Cereals, rice, millet, sugar, oil-seeds, nuts, further products
Byodo Naturkost GmbH Edisonstrasse 3 DE-84453 Mühldorf Tel.: +49-8631 36290 Fax: +49-8631 36258 byodo-naturkostgmbh@t-online.de	Culinary oils and other products
Bios Gabriell Rempe GmbH Grossmarkt Frischzentrum DE-59010 Hamm Tel.: +49-2381-54 32 50 Fax: +49-2381-54 32 540 www.bios-hamm.de	fruits and vegetables for catering company

Food Producers

Firm	Organic Range
Hipp-Werk Münchener Str. 58 DE-85276 Pfaffenhofen a.d. Ilm Tel.: +49-8441 757 481 Fax: +49-8441 757 492	Jars of organic purée, baby food, fresh produce (carrots, potatoes, onions, apples, lemons, oranges and kiwi fruit)

Firm	Organic Range
Alete Tel.: +49-800 23 44 944 www.alete.de	Prepared jars of organic food
Milupa GmbH & Co KG Bahnstraße 14–30 DE-61 381 Friedrichsdorf Tel.: +49-06172 - 99 0 www.milupa.de	Prepared jars of organic food
Döhler GmbH Riedstrasse 7–9 DE-64295 Darmstadt Tel.: +49-61513060 Fax: +49-6151 306278 michael.nocker@doehler.com	Mainly fruit-based raw materials for food production
Kanne Brottrunk GmbH & Co. KG DE-Bahnhofstr. 68 59379 Selm-Bork Tel.: +49-2592-97400	"Brottrunk", a health drink made of fermented bread
Neumarkter Lammsbräu DE-92318 Neumark Ambergerstr. 1 Tel.: +49 (91 81) 4 040	Beer, soft drinks
Beutelsbacher Fruchtsartkelterei GmbH Stuttgarterstr. 57– 59 DE-71365 Weinstadt Tel.: +49-7151 9951 50	Juices
Lebensbaum Ulrich Walter GmbH Postfach 1269 DE-49342 Diepholz Tel.: +49-5441 98560 Fax: +49-5441 985 6101 info@lebensbaum.de	Coffee, tea, spices, herbs
Davert Mühle Ascheberger Str. 2 DE-48308 Senden Tel.: +49-2598 690 Fax: +49-2598 6923	Cereal products, oils, pasta, rice
Allos Walter Lang Imkerhof GmbH Zum Streek 5 DE-49457 Mariendrebber Tel.: +49-5445 9899-0 Fax: +49-5445 9899-14 info@allos.de www.allos.de	Cereals, processed fruits, amaranth products, cakes, honey
Bruno Fischer GmbH, Naturkost DE-56242 Marienrachdorf Turmstr. 29 Tel.: +49 (26 26) 75 73 40 Fax: +49 (26 26) 75 73-9 40	Vegetarian products: soya milk, vegetal burgers, vegetal sausage, soups
Bauck Demeter Naturkost Duhenweitz 4 DE-29571 Rosche info@bauckhof.de www.bauckhof.de	Cereals, coffee, culinary oils, spreads, specialized in bio-dynamic products
Barnhouse Naturprodukte GmbH DE-84453 Mühldorf Edisonstr. 3a Tel.: +49 8631 36220 Fax: +49 8631 3622-20	Breakfast cereal products

Natural Food Stores and Organic Supermarkets

Firm	Organic Range
Münsterländische Margarine-Werke J. Lülf GmbH Postfach 1229 DE-48720 Rosendahl Tel.: +49-254 7700 Fax: +49-254 77030 ma@min.de	Margarine, oils, fats
Alnatura Darmstädter Strasse 3 DE-64404 Bickenbach Tel.: +49 6257 93220 Fax: +49 6257 9322 144 info@alnatura.de www.alnatura.de	6800 organic products, incl. fresh products, non-food items such as clothing, natural cosmetics, toys (organic supermarket)

Wholesalers and Mass-Market Retail Chains

Firm	Organic Range
REWE AG Domstr. 20 DE-50668 Köln Tel.: +49-221 1490 Fax: +49-221 149 9000	Dried products, deep-frozen products (organic ice cream, organic vegetables), apples, tropical fruits, storable vegetables, growing herbs, milk and dairy products, beef
Edeka Zentrale AG New-York-Ring 6 DE-22297 Hamburg Tel.: +49-40 63770 Fax: +49-40 63772231	Own organic range: Dairy products, dried products
METRO AG Postfach 230351 DE-40235 Düsseldorf Tel.: +49-21168 860 Fax: +49-211962 5271	Dried products (cereals, cereal flakes, muesli, seeds, pasta, biscuits, vinegar, oils), storable vegetables (onions, carrots, potatoes)
Tengelmann Handelswarengesellschaft Postfach 1020 DE-45466 Mühleim a/R Tel.: +49-208 5806 Fax: +49-208 6763 www.tengelmann.de	Dairy products, range of dried foods
TEGUT Zentrale Gerloserweg 72 DE-36039 Fulda Tel.: +49-661 10 40 Fax: +49-661 104 496 gutelebensmittel@tegut.com	Extensive range of breads and bakery products, fresh and processed meats, fruit and vegetables, dairy products. Emphasis on fresh foods

Government Bodies

LÖK – Länderarbeitsgemeinschaft zur Verordnung EWG 2092/01 (German working group of organic control authorities) c/o Landesanstalt für Ernährungswirtschaft und Jagd
Tannenstr. 24 b
Postfach 300651
DE-40406 Düsseldorf
Tel.: +49-211-4586-631
Fax: +49-211-4586-501
www.lej.nrw.de

Bundesanstalt für Landwirtschaft und Ernährung (BLE)
Referat 512/Sachgebiet Ökologischer Landbau
Ferdinand-Lassalle-Str. 1–5
DE-53168 Bonn
Tel.: +49 228 6845-2914
Fax: +49 228 6845-787
sachgebiet-oekolandbau@ble.de
www.ble.de

ZMP – Zentrale Markt- und Preisberichtstelle GmbH (Market and price reporting centre)
Rochusstrasse 2
DE-53123 Bonn
Tel.: +49-228 977 7173
Fax: +49-228 977 7179
info@zmp.de
www.zmp.de

Producer Organizations

ArbeitsGemeinschaft Ökologischer Landbau (AGÖL, Association of Organic Farming Organizations in Germany)
Brandschneise 1
DE-64295 Darmstadt, Deutschland
Telephone: +49 - 61 55 - 20 81
Fax: +49 - 61 55 - 20 83
AGOEL@T-online.de

Naturland-Verband für naturgemässen Landbau e.V.
Kleinhaderner Weg 1
DE-82166 Gräfelfing
Tel.: +49-89 854 5071
Fax: +49-89 855 974
naturland@naturland.de
www.naturiand.de

Bioland Bundesverband
Kaiserstr. 18
DE-55116 Mainz
Tel.: +49-6131239 790
Fax: +49-6131 238 7927
biolandbv@compuserve.com

Bundesverband der Produzenten Ökologischer Produkte
Robert-Bosch-Str. 6
DE-50354 Hürth
Tel.: +49-2233 9633833
Fax. +49-2233 9633830

Demeter Bund e.V.
Brandschneise 2
DE-64295 Darmstadt
Tel.: +49-6155 84690
Fax: +49-6155 846911
demeterbd@aol.com

Retail and Other Organizations

Bundesverband Naturkost Naturwaren (BNN, German Association for Natural Food and Products)
Robert-Bosch-Str 6
DE-50354 Hürth
Tel.: +49-2233 963 3847
Fax: +49-2233 963 3810
bnn-eh.hoeschler@t-online.de

Fair Trade eV
Bruch 4
DE-42279 Wuppertal
Tel.: +49-202 648 9232
Fax: +49-202 648 9235
info@fairtrade.de
www.fairtrade.de

Green Trade Net
Tel.: +49-69 811 228
Fax: +49-69 824 684
info@green-tradenet.de
www.green-tradenet.de

ÖkoWelt Veranstaltungs GmbH
Industriestrasse 12
DE-91186 Büchenbach
Tel.: +49-09171-9610-0
Tax: +49-09171 - 4016
info@biofach.de
www.biofach.de

Central Internet portal on organic agriculture
(only in German)
www.oekolandbau.de

GTZ
Dag-Hammarskjöldweg 1–5
DE-65760 Eschborn
Tel.: +49-6196 790
Fax: +49-6196 791115
www.gtz.de

Stiftung Ökologie und Landbau (SÖL)
Weinstr. Süd 51
DE-67098 Bad Dürkheim
Tel.: +49-6322 9897 00
Fax: +49-6322 9897 01
info@soel.de
www.soel.de

Verlag Gesund Essen GmbH
Am Eichwald 24
DE-64850 Schaafheim
Tel.: +49-6073 748 251
Fax: +49-6073 748 299
naturkost@aol.com
www.naturkost.de

TransFair Germany
Remigiusstr. 21
DE-50937 Köln
Tel.: +49-221942 0400
Fax: +49-221942 04040
info@transfair.org
www.transfair.org

ALOG eV (data bank of GMO-free products)
Tel.: +49-6322 8666
Fax: +49-6322 8794
www.infoxgen.com

Label Programmes and Certification Bodies

BCS ÖkoGarantie GmbH
Cimbemstr. 21
DE-90402 Nürnberg
Tel.: +49-911 42439-0
Fax: +49-911 492 239
info@bcs-oeko.de
www.bcs-oeko.de

Ecocontrol Ecocert GmbH
Förster Str. 87D
DE-37520 Osterode
Tel.: +49-5522 951 161
Fax: +49-5522 951 164
info@ecocert.de

GfR Geselischaft fur Ressourcenschutz
Prinzenstr. 4
DE-37073 Goffingen
Tel.: +49-551 586 57
Fax: +49-551 587 74
info@gfrs.de
www.gfrs.de

ÖPZ GmbH
Godesberger Allee 125–127
DE-53175 Bonn
Tel.: +49 (0) 228 53689-0
Fax: +49 (0) 228 53689-29
info@bio-siegel.de
www.bio-siegel.de

List of approved inspection bodies
www.verbraucherministerium.de/landwirt-
schaft/oekologlandbau/kontrollstellenverz.pdf

7. Italy

Wholesalers, Retailer

Firm	Organic Range
Adria Fruit Piazza Rossetti 2/8 IT-16129 Genova Tel.: +39 010 576 72 29 Fax: +39 010 576 72 49 info@adriafruit.it	Bananas, grapes, plums, cherrier, pineapples, kiwis, pears, oranges, grapefruite, dried fruits, apples, peaches, lemons, mangoes, tomatoes, artichoke, celery, cabboge, péppers, green salads, courgette, french beans
Billa Italia SRL Via Postumia 15 IT-35010 Carmignano di Brenta (PD) Tel.: +39 049 942 34 44 Fax: +39 049 943 02 44 www.billa.it	Broad range of food and beverages
Bottega e Natura Via Crea, 10 IT-10095 Grugliasco (TO) Tel.: +39 011 777 08948 info@bottegaenatura.com www.bottegaenatura.com	Broad range of food products
BRIO SPA Via Manzoni 99 IT-37050 Campagnola di Zevio (VR) Tel.: +39 045 895 17 77 Fax: +39 045 873 17 44 brio@briospa.com www.briospa.com	Fruits and vegetables, pasta, milk and by-products, wine
Conad-Consorzio Nazionale Dettaglianti Scarl Via Michelino 59 IT-40127 Bologna (BO) Tel.: +39 051 508 111 Fax: +39 051 508 247, +39 051 508 414 olg@conad.it www.conad.it	Extensive range, e.g. olive oil, pasta, coffee, fruit juices, fresh fruits
COOP Italia SCRL Via del Lavoro 6–8 IT-40033 Caslecchio di Reno (BO) Tel.: +39 051 596 111 Fax: +39 051 596 304, +39 051 596 218 www.e-coop.it	Nuts, dried and fresh fruits and vegetables
DESPAR Italia SCRL Via Caldera 21 IT-20153 Milano (MI) Tel.: +39 02 409 091 Fax: +39 02 409 18 177 www.edespar.it	Extensive range, incl. fresh fruits and vegetables
Ecor SPA Via Palù, 23 Loc Zoppé IT-31020 San Vendemiano (TV) Tel.: +39 0438 7704 Fax: +39 0438 770447 info@ecor.it www.ecor.it	Cereals and its products, milk and by-products, meat, eggs, fruits, honey, oil, alcoholic beverages, etc.
Esselunga Via Giambologna 1 IT-20090 Limito (MI) Tel.: +39 02 92 367 Fax: +39 02 926 72 02 www.esselunga.it	Fruits and vegetables, beverages, pasta

Firm	Organic Range
Finiper Via Mameli 19 IT-27054 Montebello Della Battaglia (PV) Tel.: +39 0383 894 511 Fax: +39 0383 592 257	Cereals and it's products, meat, fruits and vegetables, beverages
Grandi Magazzini e Supermercati il Gigante SPA Via Clerici 342 IT-20091 Bresso (MI) Tel.: +39 02 240 42 51 Fax: +39 02 26 22 43 02	Cereals, meat, fruits and vegetables, beverages
GS SPA – Carrefour Via Caldera 21 IT-20153 Milano (MI) Tel.: +39 02 48 251 Fax: +39 02 482 02 325 www.carrefour.com	Cereals and it's products, fruits and vegetables, beverages
KI-GROUP Via Marchesi 9 IT-10039 Collegno Tel.: +39 011 7176700 Fax: +39 011 725983 kigroup@kigroup.com www.kigroup.com	Cereals and it's products, meat, fruits and vegetables, fruit juices, tea
Naturasì SRL Via Mura S. Bernardino, 1 IT-37123 Verona (VR) Tel.: +39 045 8030021 Fax: +39 045 8031371 naturasi@naturasi.com www.naturasi.com	Cereals, fruits and vegetables, beverages
Group PAM Via delle Industrie 8 IT-30038 Spinea (VE) Tel.: +39 041 549 51 11 Fax: +39 041 999 393 www.gruppopam.it	A big company with a supermarket chain, restaurants, travel agency, travel retail and hard discount
Rinascente/Gruppo Auchan Strada 8, Palazzo N-Milanofiori IT-20089 Rozzano (MI) Tel.: +39 02 575 81 Fax: +39 57 58 31 80 www.grupporinascente.it	World wide hyper- and supermarkets
Veritas Biofrutta SPA Via Provinciale 142 IT-44034 Gradizza di capparo Tel.: +39 532 87 38 11 Fax: +39 532 830 332 verybio@verybio.it	Cereals and products, meat, fruits, sweeteners, oil, condiments, beverages

Processors and Importer

Firm	Organic Range
Abafoods SRL Via Ca' Mignola vecchia 1775 IT-45021 Badia Polesine RO Tel.: +39 0425 594489 Fax: +39 0425 594496 abafoods@libero.it www.abafoods.it www.isolabio.it	Concentrated juices, beverages
Apofruits Scarl Via Ravennate 1345 IT-47023 Cesena (FO) Tel.: +39 0547 643111 Fax: +39 0547 643166 info@apofruit.it www.apofruit.it	Fruits and vegetables
Baule Volante SRL Via E. Matti, 48/11 H IT-40138 Bologna Tel.: +39 051 6008411 Fax: +39 051 538869 baule@baulevolante.it www.baulevolante.it	Cereals, flours, pasta, soy, milk and by-products, fruits, vegetables, jucies, beverages, condiments
Besana SPA Via Ferrovia 206 IT-80040 San Gennaro Vesuviano (NA) Tel.: +39 081 86 59 111 Fax: +39 081 865 76 51 www.vbesana.it	(only nuts and dried fruits)
Cotrapo Scarl Via Trento 778-2 IT-45024 Fiesso Umbertiano RO Tel.: +39 0425 740274 Fax: +39 0425 741322 cotrapo@cotrapo.it www.cotrapo.it	Fruit-puree, tomato-puree, tomato-juice
Confruit GSPA Via Emilia Ponente 4 IT-48018 Faenza RA Tel.: +39 0546 623411 Fax: +39 0546 621548 info@confruitg.it www.confruitg.it	Juices and preserves, oil, beverages, miscellaneous
Hans Zipperle SRL Via M. Valier 3 IT-39012 Merano BZ Tel.: +39 0473 274100 Fax: +39 0473 274222 www.zipperle.it	Juices and preserves, beverages
HERO Italia SPA Via E. Fermi 6 IT-37135 Verona Tel.: +39 045 8097111 Fax: +39 045 8097200 www.hero.it	Jams, fruit confitures, pre-cooked vegetable products

Firm	Organic Range
Organicsur Via Andrea Costa, 112/2 IT-40067 Rastignano (BO) Tel.: +39 051 6260361 Fax: +49 051 6265252 francodepanfilis@organisur.it www.organicsur.it	Fruit and vegetables, baked products, sweeteners, oil, beverages
Sweet Via Duchessa Isabella 6 IT-10011 Agliè (TO) Tel.: +39 0124 429 011 Fax: +39 0124 429 928 sweet@rivarolo.alpcom.it	nuts and dried fruits

Certification Bodies and Organizations of the Organic Sector

AIAB
Certification body
Strada Maggiore, 29
IT-40125 Bologna
Tel.: +39 051 272986
Fax: +39 051 232011
aiab@aiab.it
www.aiab.it

ASS SUOLO E SALUTE
Certification body
Via Abbazia, 17
IT-61032 Fano (PS)
Tel.: +39 0721 830373
Fax: +39 (0)721 830373
suoloesa@tin.it
www.suoloesalute.it

BIOAGRICOOP
Certification body
Via Fucini 10
IT-40033 Casalecchiodi Reno (BO)
Tel.: +39 051 6130512
Fax: +39 (0)51 6130224
bioagri@mail.asianet.it
www.bioagricoop.it

GRAB-IT
Organic Research,
Market research
c/o DIBIAGA-University of Ancona
Via Brecce Bianche
IT-60125 Ancona (IT)
Tel.: +39 071 2204929
Fax: +39 071 2204858
grabit@agrecon.unian.it

FIAO
Umbrella body grouping
most certification bodies
Via Barozzi, 8
IT-40126 Bologna
Tel.: +39 051 254688
Fax: +39 051 254842
fiao@greenplanet.net

Name	Address	Tel.	Fax	E-mail/Homepage	Accreditation
ICEA, Istituto di certificazione etica e ambientale	Strada Maggiore, 29 IT-40152 Bologna	+39 051 272986	+39 051 232 011	icea@icea.info www.icea.info	EN 45011, IFOAM, NOP, JAS
Bioagricert	Via dei Macabraccia 8 IT-40033 Casalecchio di Reno (BO)	+39 051 562158	+39 051 564294	info@bioagricert.org www.bioagricert.org/	EN 45011, IFOAM, NOP, JAS
CCPB, Consorzio per il Controllo dei Proddotti Biologici Soc. Coop. Arl	Via Jacopo Barozzi, 8 IT-40126 Bologna (BO)	+39 051 6089811	+39 051 254842	ccpb@ccpb.it www.ccpb.it/uK/index.html	EN 45011
Ecocert Italia	Corso delle Provincie, 60 IT-95127 Catania (CT)	+39 095 442746-433071	+39 095 505094	info.ecocert@ecocertitalia.it www.ecocertitalia.it	MiPAF
Istituto Mediterraneo di Certificazione	Via C. Pisacane, 53 IT-60019 Senigallia (AN)	+39 071 7928725	+39 071 7910043	imcert@imcert.it www.imcert.it	EN 45011
Associazione Suolo e Salute	Via Abbazia, 17 IT-61032 Fano (PS)	+39 0721 830373	+39 0721 830373	info@suoloesalute.it www.suoloesalute.it	EN 45011, NOP
Codex s.r.l.	Via Duca degli Abruzzi, 41 IT-95046 Scordia (CT)	+39 095 650643- 716	+39 095 650356	codex@codexsrl.it www.codexsrl.it	EN 45011, IFOAM
QC&I International Services	Villa Parigini - Loc. Basciano IT-53035 Monteriggioni (SI)	+39 0577 327234	+39 0577 329907	lettera@qci.it www.qci.it	EN 45011
Bios	Via Monte Grappa, 7 IT-36063 Marostica (VI)	+39 0424 471125	+39 0424 476947	info@certbios.it www.certbios.it	EN 45011
Eco System International Certificazioni S.r.l.	Via Monte San Michele, 49 IT-73100 Lecce (LE)	+39 0832 311589	+39 0832 311589	info@ecosystem-srl.it www.ecosystem-srl.it/	MiPAF
Biozoo-S.r.l.	Via Chironi, 9 IT-07100 Sassari (SS)	+39 079 276537	+39 079 276537	info@biozoo.org	MiPAF

Governmental Bodies

Federazione Italiana per l'Agricoltura Organica FIAO
Lino Nori
Via Barozzi 8,
IT-40126 Bologna, Italy
Tel.: +39 051 2960164
Fax: +39 051 2918689
fiao@greenplanet.net
www.fiao.it

Ministero delle Politiche Agroalimentari,
Dipartimento della qualità dei prodotti agroalimentari e dei servizi
Battista Piras
Via XX settembre 20,
IT-00187 Roma RM, Italy
Tel.: +39 06/46655072
Fax: +39 06 4742314
Bio-agr@politicheagricole.it
www.politicheagricole.it/PRODUZIONE/AGRIBIO/home.asp

Consortium
via Ballerini 1, pavia
Tel.: +39 2/48011219
Fax: +39-2/92367724
www.consortium-bio.it/index.htm

Distilleria
Distilleria EcoEditoria
Rosa Maria Bertino
Viale della Libertà,
IT-47100 Forlì, Italy
Tel.: +39 0543 32532
Fax: + 39 0543 24311
distilleria@biobank.it
www.biobank.it

8. Schweden

Retail Groups

Firm	Organic Range
Axfood AB P.O. Box 7314 SE-103 90 Stockholm Tel.: +46 8 553 998 00 Fax: +46 8 553 998 05 info@axfood.se www.axfood.se	
BergendahlsGruppen AB P.O. Box 22 SE-281 21 Hässleholm Tel.: +46 451 480 00 Fax: +46 451 150 01 info@bergendahls.se www.bergendahls.se	
D&D Unil AB Anderstorpsvägen 22 SE-171 78 Solna Tel.: +46 8 734 44 16 Fax: +46 8 735 77 56 info@dod-dagligvaror.se www.dod-dagligvaror.se	
ICA Handlarnas AB SE-171 93 Solna Tel.: +46 8 585 500 00 Fax: +46 8 585 500 09 info@ica.se www.ica.se	
KF P.O. Box 15200 SE-104 65 Stockholm Tel.: +46 8 743 1423 Fax: +46 8 743 1575 info@kf.se www.kf.se	

Importers

Firm	Organic Range
Arvid Nordquist H.A.B. P.O. Box 1285 SE-171 25 Solna Tel.: +46 8 799 1800 Fax: +46 8 294 157 vinarvid@arvid-nordquist.se www.arvid-nordquist.se	Coffee roaster, also imports branded packaged foods
Biodynamiska Produkter P.O. Box 42 SE-153 21 Järna Tel.: +46 8 554 810 30 Fax: +46 8 554 810 39 info@biodynamiskaprodukter.nu	Green coffee, also imports fresh produce and packaged foods
Kaffebönans Rosteri AB Kvarngatan 13 SE-784 63 Borlänge Tel.: +46 243 79 20 00 Fax: +46 243 79 20 01	Coffee roaster, also imports roasted coffee

Firm	Organic Range
Kraft Foods Sverige AB P.O. Box 615 SE-801 26 Gävle Tel.: +46 26 65 61 00 Fax: +46 26 51 14 20 kraftfoodssverige@krafteurope.se www.kraftfoodsnordic.com	Coffee roaster, also imports herbs and spices
Kung Markatta AB Hjälmarsberg SE-705 90 Örebro Tel.: +46 19 307 300 Fax: +46 19 320 201 info@kungmarkatta.se www.kungmarkatta.se	Roasted coffee, packaged foods
Löfbergs Lila AB P.O. Box 1501 SE-651 21 Karlstad Tel.: +46 54 1401 00 Fax: +46 54 1401 35 info@lofbergslila.se www.lofbergslila.se	Coffee roaster
Sackéus AB Bessermergatan 4 SE-417 04 Göteborg Tel.: +46 31 65 4800 Fax: +46 31 65 4805 info@sackeus.se www.sackeus.se	Roasted and instant coffee, packaged foods
Zoégas Kaffe AB P.O. Box 7073 SE-250 07 Helsingborg Tel.: +46 421 933 00 Fax: +46 421 476 80 info@se.nestle.com www.zoegas.se	

Fresh Fruits and Vegetables

Firm	Organic Range
AltGrönt AB Vargmötesvägen 14 SE-186 30 Vallentuna Tel.: +46 8 511 700 60 Fax: +46 8 511 763 64 altgront@altgront.se www.altgront.se	Fruits and vegetables
BananKompaniet AB P.O. Box 27294 SE-102 53 Stockholm Tel.: +46 8 667 9160 Fax: +46 8 661 3607 info@saba.se www.banan-kompaniet.se	Bananas
Biodynamiska Produkter P.O. Box 42 SE-153 21 Järna Tel.: +46 8 554 810 30 Fax: +46 8 554 810 39 info@biodynamiskaprodukter.nu	Fresh produce and packaged foods

Firm	Organic Range
Direkt Frukt och Grönt AB Flintrännegatan 21 SE-211 24 Malmö Tel.: +46 40 180 900 Fax: +46 40 180 901 torbjorn.karlsson@direktlivs.se www.direktlivs.se	Fruits and vegetables
Frukt & Grönsaksspecialisten Knut Pals Väg 8 SE-256 69 Helsingborg Tel.: +46 42 201 160 Fax: +46 42 153 727 info@fgs.se www.fgs.se	Fruits and vegetables
ICA Frukt & Grönt P.O. Box 713 SE-251 07 Helsingborg Tel.: +46 42 189 000 Fax: +46 42 189 288 info@ica.se www.ica.se	Fruits & vegetables
Marianne's Farm AB Dalsgard 2393 SE-262 92 Ängelholm Tel.: +46 422 071 33 Fax: +46 422 070 49 info@mariannesfarm.se www.mariannesfarm.se	Vegetables
Saba Trading AB P.O. Box 27106 SE-102 52 Stockholm Tel.: +46 8 602 60 80 Fax: +46 8 602 60 99 info@saba.se www.saba.se	Fruits & vegetables

Other Foods

Firm	Organic Range
Arvid Nordquist H.A.B. P.O. Box 1285 SE-171 25 Solna Tel.: +46 8 799 1800 Fax: +46 8 294 157 vinarvid@arvid-nordquist.se www.arvid-nordquist.se	Imports branded packaged foods; coffee roaster
Biofood AB Verkstadsvägen 14 SE-137 37 Västerhaninge Tel.: +46 8 500 200 00 Fax: +46 8 500 242 15 biofood@telia.com www.biofood.se	Vegetable oils, sugar, syrup, dried fruits, raisins, seeds, pasta products, milk powder
Björnekulla Fruktindustri AB Tvärgatan 1 SE-265 31 Astorp Tel.: +46 42 564 00 Fax: +46 42 505 25 info@bjornekulla.se www.bjornekulla.com	Fruit preservers, juices, canned vegetables

Firm	Organic Range
Carlshamn Mejeri AB SE-374 82 Karlshamn Tel.: +46 454 825 00 Fax: +46 454 313 75 carlshamn.mejeri@c-mejeri.se www.carlshamn.com	Margarine, vegetable oils, ice-cream
CHE-BE Trading AB P.O. Box 247 SE-151 23 Södertälje Tel.: +46 8 550 32 890 Fax: +46 8 550 30 277 info@chebetrading.se www.mrschwengs.com	Soy products, canned vegetables, jasmine rice etc.
Dagsmeja Ren Mat HB Verkstadsvägen 24 SE-245 34 Staffanstorp Tel.: +46 46 253 600 Fax: +46 46 252 111	Cereal and other products
Di Luca Branded Food AB Bondegatan 29, 6 TR SE-116 33 Stockholm Tel.: +46 8 641 9569 Fax: +46 8 640 4079	Pasta products, vegetable oils
EnarSahn AB Stenslingan 4 SE-182 34 Danderyd Tel.: +46 8 755 0706 Fax: +46 8 755 0706	Fruit and vegetable juices, canned vegetables, fruit purées
Falcon Bryggeri AB P.O. Box 164 SE-311 22 Falkenberg Tel.: +46 346 571 05 Fax: +46 346 171 55 konsumentservice@carlsberg.se www.falcon.se	Brewery owned by Carlsberg, Denmark
Föreningen mana EkoSol C/o Groth, Erikshällsg 40 SE-151 46 Södertälje Tel.: +46 8 550 865 08 Fax: +46 8 550 319 67 soren.groth@mailbox.swipnet.se	Herbs and spices
Formidabel AB Kvarnbyvägen 13 SE-212 36 Malmö Tel.: +46 40 497 470 Fax: +46 40 497 420 info@formidabel.se www.formidabel.se	Herbs and spices
Frebaco Kvarn AB P.O. Box 878 SE-531 18 Lidköping Tel.: +46 510 860 00 Fax: +46 510 860 19 kvarn@febaco.se www.frebaco.se	Cereal Products
Garbo Food AB Hälleflundragatan 12 SE-426 58 Västra Frölunda Tel.: +46 31 293 650 Fax: +46 31 292 943 mail@garbofood.se www.garbofood.se	Packaged foods

Firm	Organic Range
Helhetshälsa AB SE-592 93 Borghamn Tel.: +46 143 20 200 Fax: +46 143 20 208 info@helhetshalsa.se www.helhetshalsa.se	Vegetable oils
Hilda & Hulda AB Folkungavägen 1B SE-611 34 Nyköping Tel.: +46 155 286 400 Fax: +46 155 286 444	Roasted soy products
HNC Agenturer P.O. Box 154 SE-147 23 Tumba Tel.: +46 8 530 30 987 Fax: +46 8 530 35 425 hnc@telia.com	Bread products
Hakansonn Tony Slättakra Gard SE-230 42 Tygelsjö Tel.: +46 40 466 300 Fax: +46 40 469 666	Fresh produce
JO-Bolaget Fruktprodukter HB Torsgatan 14 SE-105 46 Stockholm Tel.: +46 8 789 54 00 Fax: +46 8 789 54 80 info@jobolaget.se www.jobolaget.se	Juices and nectars
Karlshamns AB Västra kajen SE-374 82 Karlshamn Tel.: +46 454 824 24 Fax: +46 454 822 20 info@karlshamn.se www.karlshamn.se	Oils and fats
Kraft Freia Marabou AB SE-172 85 Sundbyberg Tel.: +46 8 627 10 00 Fax: +46 8 98 61 00 kraftfoodssverige@krafteurope.com www.kraftfoodsnordic.com	Chocolate products
Kvarn AB Juvel P.O. Box 8878 SE-402 72 Göteborg Tel.: +46 31 779 1600 Fax: +46 31 220 579	Cereal products, rice
Natura AB Almarkaröd SE-242 92 Hörby Tel.: +46 415 622 50 Fax: +46 415 620 35 info@natura.se www.natura.se	Fresh produce
Nordfalks AB P.O. Box 63 SE-431 21 Mölndal Tel.: +46 31 86 58 00 Fax: +46 31 86 58 01	Herbs and spices, tea, Mexican foods

Firm	Organic Range
Ölands Frö AB P.O. Box 58 SE-380 62 Mörbylanga Tel.: +46 485 40 660 Fax: +46 485 40 329 romarker@olandsfro.se www.olandsfro.se	Dried vegetables
Raggardens Produkter AB Arentorp SE-534 94 Vara Tel.: +46 512 13 490 Fax: +46 512 13 077 rpab.liselotte@delta.telenordia.se www.raggardensprodukter.se	Fresh produce, preserved vegetables
Risenta AB P.O. Box 7411 SE-103 91 Stockholm Tel.: +46 8 545 015 70 Fax: +46 8 611 53 66 info@risenta.se www.risenta.se	Health foods, dried vegetables, seeds
Raby Biogrönt AB Raby 4, PL 250 SE-242 92 Hörby Tel.: +46 415 311 156 Fax: +46 415 311 156 biogront@telia.com	Fresh produce
Sackéus AB Bessermergatan 4 SE-417 04 Göteborg Tel.: +46 31 65 4800 Fax: +46 31 65 4805 info@sackeus.se www.sackeus.se	Fair trade labelled and organic packaged foods, coffee
Samodlarna Svea Fabriksgatan 3 SE-684 00 Munkfors Tel.: +46 563 52 530 Fax: +46 563 52 191 jan.knutar@swegro.se www.swegro.se	Fresh produce, dried vegetables, cereales, packaged foods
Salta Kvarn AB SE-153 91 Järna Tel.: +46 8 551 50 280 Fax: +46 8 551 50 240 info@saltakvarn.se www.saltakvarn.se	Bread, flour and other cereal products
Seege AB Skallebackav 10 SE-302 41 Halmstad Tel.: +46 351 910 00 Fax: +46 351 910 19 info@seege.se www.seege.se	Flour, grains and breakfast cereals
Semper Foods AB Torsg 14 SE-105 46 Stockholm Tel.: +46 8 677 31 00 Fax: +46 8 677 31 01	Baby foods, health foods, herbal salt, raw materials and ingredients

Firm	Organic Range
Svenska Nestlé SE-267 81 Bjuv Tel.: +46 42 860 00 Fax: +46 42 783 00 www.nestle.se	Packaged foods, raw materials for manufacture
Svenska Nutana AB Ekebyholm SE-762 91 Rimbo Tel.: +46 175 709 05 Fax: +46 175 701 90 info@nutana.se www.nutana.se	Canned and frozen foods, cereals and grains)
Torfolk Gard AB Ö Skymäs SE-684 95 Höje Tel.: +46 563 723 68 Fax: +46 563 720 66 torfolk@torfolk.se www.torfolk.se	Fruit preserves; chilli, pesto and other sauces; tomato products; vinegar; wine
Vargarda Kvarn P.O. Box 136 SE-447 00 Vargarda Tel.: +46 322 230 85 Fax: +46 322 242 73	Cereal products
Wasabröd AB SE-682 82 Filipstad Tel.: +46 590 18 100 Fax: +46 590 18 500 info@wasabrod.se www.wasabrod.se	Crisp bread, rice crackers

Raw Materials and Ingredients for food manufactures and packers

Firm	Organic Range
B. Engelhardt & Co. AB P.O. Box 49 SE-421 21 Västra Frölunda Tel.: +46 31 709 17 00 Fax: +46 31 709 17 39 info@engelhardt.se www.engelhardt.se	
Contifood AB P.O. Box 16002 SE-200 25 Malmö Tel.: +46 409 45 170 Fax: +46 402 21 045	
Eco Trade AB P.O. Box 905 SE-601 19 Norrköping Tel.: +46 11 218 006 Fax: +46 11 138 650 anneke.svantesson@odal.se www.odal.se/odal/spannmal/krav/kravsyr.htm	Cereal products, dried vegetables
R. Lundberg AB P.O. Box 104 SE-201 21 Malmö Tel.: +46 40 698 11 00 Fax: +46 40 698 11 01 fornamn.efternamn@abrlundberg.com www.abrlundberg.se	

Firm	Organic Range
Verner Frang AB Box 313 SE-503 11 Boras Tel.: +46 33 12 78 00 Fax: +46 33 10 64 99 info@vernerfrang.se www.vernerfrang.se	

Seed and Planting Material

Firm	Organic Range
Frökompaniet Landskrona AB Bromsgatan 5 SE-261 35 Landskrona Tel.: +46 418 168 60 Fax: +46 418 285 10 info@froekompaniet.se www.froekompaniet.se	Onion sets, seeds
Lindbloms Frö P.O. Box 86 SE-277 21 Kivik Tel.: +46 414 708 80 Fax: +46 414 700 09 post@lindbloms.se www.lindbloms.se	Onions sets, seeds

KRAV
Box 1940
SE-751 49 Uppsala
Tel.: +46 18 10 02 90
Fax: +46 18 10 03 66
info@krav.se
www.krav.se

Livsmedelsverket
National Food Administration
Box 622
SE-751 26 Uppsala
Tel.: +46 18 175500
Fax: +46 18 10 58 48
livsmedelsverket@slv.se
www.slv.se

Jordbruksverket
Swedish Board
of Agriculture
SE-551 82 Jönköping
Tel.: +46 36 15 50 00
Fax: +46 36 19 05 46
jordbruksverket@sjv.se

9. The Netherlands

Importers, processors and packers

Ariza BV
Krommesteenweg 7
NL-5707 CA Helmond
Tel.: +31-492 528 364
Fax: +31-492 545 151

De Traay
Platinastraat 50
NL-8211 AR Lelystad
Tel.: +31-320 282 928
Fax: +31-320 282 028
info@detraay.com
www.detraay.com

Doens Food Ingredients BV
Oraniestraat 40A
Postbus 10
NL-4515 ZG IJzendijke
Tel.: +31-117 302 020
Fax: +31-117 301 166
info@doensfood.com

Do-it BV
Prins Hendrikweg 10
NL-3771 AK Barneveld
Tel.: +31-342 423 119
Fax: +31-342 423 571
www.organic.nl

Eosta BV
Postbus 132
NL-3980 CC Bunnik
Tel.: +31-306 566 000
Fax: +31-306 566 040
info@eosta.com

Euroherb BV
De Smalle Zijde 37
NL-3903 LM Veenendaal
Tel.: +31-318 543 288
Fax: +31-318 542 458

Good Food Foundation
Alike Last
Postbus 219
NL-3850 AE Ermelo
Tel.: +31-341 560 210
Fax: +31-341 562 913
info@goodfood.nl
www.goodfood.nl

Greenfood International BV
Steutenburgerweg 75
NL-3784 VD Terschmer
Tel.: +31 342 460 000
Fax: +31 342 460 005

Horizon Natuurvoeding BV
Postbus 77
NL-3400 AB IJsselstein
Tel.: +31-30 688 7730
Fax: +31-30 688 7142

Koffiebranderij G. Peeze BV
Ringoven 36
NL-6826 TR Arnhem
Tel.: +31-263 622 422
Fax: +31-263 613 380

Marfo Martinair Food B.V.
Koperstraat 31
NL-8200 AC Lelystad, Flevoland
Tel.: +31-320 293 894
Fax: +31-320 232 096
martinairfood@wxs.nl

Neuteboom BV
Aadijk 41
NL-7602 PP Almelo
Tel.: +31-546 864 062
Fax: +31-546 864 062

Odin International BV
Postbus 225
NL-4190 CE Geldermalsen
Tel.: +31-345 577 133
Fax: +31-345 576 848
www.odin.nl

Renco BV
Postbox 46
NL-6600 AA Wijchen
Tel.: +31-24 641 5304
Fax: +31-24 641 5314

Rhumveld Winter & Konijn BV
Postbus 29216
NL-3001 GE Rotterdam
Tel.: +31-102 330 900
Fax: +31-102 330 574
rwk@rhumveld.com
www.rhumveld.com

Rijk Zwaan Nederland BV
Postbus 40
NL-2678 ZG De Lier
Tel.: +31-174 532 300
Fax: +31-174 515 334
www.rijkzwaan.nl

Tradin Organic Agriculture BV
Latexweg 12
NL-1047 BJ Amsterdam
Tel.: +31-204 074 499
Fax: +31-204 972 100
info@tradinorganic.com
www.tradinorganic.com

Trouw BV
Piekstraat 63-65
NL-3071 EL Rotterdam
Tel.: +31-10 486 6332
Fax: +31-10 4886 0928

Retail

De Nieuwe Band
Noorderringweg 12
NL-9363 TC Marum
Tel.: +31-594 645 353
Fax: +31-594 643 385
info@nieuweband.nl

De Rit
Retsezijstraat 4
NL-4011 JP Zoelen
Tel.: +31-344 681 653
Fax: +31-344 681 404

Natudis BV
Postbus 376
NL-3840 AJ Harderwijk
Tel.: +31-341 464 211
Fax: +31-341 425 704
info@natudis.nl

TerraSana NL BV
Postbus 70
NL-2450 AB Leimuiden
Tel.: +31-172 503 344
Fax: +31-172 503 355
www.TerraSana.com

Udea BV
Postbus 478
NL-5400 AL Uden
jvdboogaard@ekoland.con
www.ekoland.com

Wholesalers and Mass-Market Retail Chains

Albert Heijn
Project Organic Products
Proviancialeweg 11
Postbus 3000
NL-1500 HA Zaandam
Tel.: +31-756 592 218
Fax: +31-756 598 644
leontine.gast@corp.ah.nl

De Nieuwe Weme BV
Postbus 90
NL-8440 AB Heerenveen
Tel.: +31-513 630 333
Fax: +31-513 650 170

DekaMarkt BV
Postbus 86
NL-1940 AB Beverwijk
Tel.: +31-251 276 661
Fax: +31-251 276 657

Konmar BV
De Werf 13
NL-2544 EH Den Haag
Tel.: +31-703 215 121
Fax:+31-703 291 174

NWO
(De Natuurwinkel/Gimsel/
De Groene Winkel)
Postbus 193
NL-3840 AD Harderwijk
Tel.: +31-341 464 211
Fax: +31-341 464 204
info.nl@denatuurwinkel.com

Vomar Voordeelmarkt BV
Postbus 217
NL-1970 AE IJmuiden
Tel.: +31-255 563 700
Fax: +31-255 521 649
vomar@vomar.nl
www.vomar.nl

Authorities, Organizations and Certifiers

B-D Association
(Vereniging voor Biologisch-Dynamische Landbouw)
Postbus 17
NL-3970 AA Driebergen
Tel.: +31-343 531 740
Fax: +31-343 516 943
Bd.vereniging@ecomarkt.nl
www.demeter-bd.nl

CBI
(Centre for the Promotion of Imports from developing countries)
WTC Beursbuilding, 5th floor
Postbus 30009
NL-3001 DA Rotterdam
Tel.: +31-102 013 434
Fax: +31-104 114 081
cbi@cbi.nl
www.cbi.nl

Dutch Food Inspection Service
Ministry of Welfare, Health and Cultural Affairs
Postbus 5840
NL-2280 HV Rijswijk
Tel.: +31-70 340 5060
Fax: +31-70 340 5435

Fair Trade Association
Beesdseweg 5
Postbus 115
NL-4100 AC Culemborg
Tel.: +31-345 545 151
Fax: +31-345 521 423

Good Food Foundation
PO Box 219
NL-3850 AE Ermelo
Tel.: +31-341 560 210
Fax: +31-341 562 913
info@goodfood.nl

Ministerie van Landbouw, Natuurbeheer en Visserij
Postbus 20401
NL-2500 EK Den Haag
The Netherlands
Tel.: +31 703 786 868
Fax: +31 703 786 100
www.minlnv.nl/

SKAL
Dr. Klinkertweg 28a
Postbus 384
NL-8000 AJ Zwolle
Tel.: +31-38 426 8181
Fax: +31-38 421 3063
info@skal.com
www.skal.com

Stichting Biologica – Platform Biologica
Postbus 12048
NL-3501 AA Utrecht
Tel.: +31-302 300 713
Fax: +31-302 304 423
biologic@xs4all.nl
www.platformbiologica.nl

Stichting Max Havelaar
Lucasbolwerk 7
NL-3500 BG Utrecht
Tel.: +31-302 337 070
Fax: +31-302 332 929
maxhavelaar@maxhavelaar.nl
www.maxhavelaar.nl

10. United Kingdom (England, Scotland, Wales and Northern Ireland)

Importers, Traders and Wholesalers

Firm	Organic Range
Organic Farm Foods of Wales Llambed Estate, Lampeter GB-Carmarthenshire SA48 8LT Tel.: +44-1570 423099 Fax: +44-1570 423280 petersegger@offcom	Extensive range, incl. fresh fruits and vegetables and exotic specialities
Organic Marketing Company Unit 1, Leighton Court Lower Eggleton, Ledbury GB-Herefordshire HR8 2UN Tel.: +44-1531640819 Fax: +44-1531 640818	Fruits and vegetables
Congelow Produce Ltd Den Farm Lane, Collier Street GB-Tonbridge, Kent TN 12 9 PX Tel.: +44-1892 730447 Fax: +44-1892 730566	Fruits and vegetables
Community Foods Ltd. Brent Terrace GB-London NW2 1 LT Tel.: +44-20 8450 9419 Fax: +44-20 8208 1551	Processed organic products, incl. dried fruit and nuts, teas, vegetable oils, cereals, dried leguminous vegetables
Hider Food Imports Wiltshire Road GB-Kingston upon Hull HU4 6PA Tel.: +44-1482 561137 Fax: +44-1482 565668	Nuts and dried fruits, leguminous vegetables, herbs and spices, cereals, coffee, bananas
Harley Food Blindcrake Hall, Blindcrake GB-Cockermouth GA13 OQP Tel.: +44 1900 823 037 Fax. +44 1900 828 276	Dried fruit, leguminous vegetables, grains, herbs, cereals, rice
Juniper Fine and Foods Unit 2, Downs Way Industrial Estate Tinwalds Downs Road, Heathall GB-Dumfries DG1 3RS Tel.: +44-1387 249333 Fax: +44-1387 249900	Fresh, chilled and deep-frozen foods and beverages, cereals
Traidcraft plc Kingsway North. Gateshead GB-Tyne & Wear NE 11 0NE Tel.: +44-1914 910591 Fax: +44-1914 976562	Tea and coffee (fair trade and organic label)
Equal Exchange Trading Ltd 10a Queensferry Street GB-Edinburgh EH2 4PG Tel.: +44-131 220 3484 Fax: +44-131 220 3565 www.equalexchange.co.uk	Tea and coffee (fair trade and organic label)

Some supermarket chains prefer to purchase organic products through their traditional (conventional) suppliers. Among these suppliers are:
• Mack Multiples – www.mwmack.com
• Wealmoor – www.wealmoor.co.uk

Retail

Supermarket Chains	Organic Range
Sainsbury's Stamford House GB-London SE1 9LL Tel.: +44-171695 0024 Fax: +44-171 695 7507 www.sainsbury.co.uk	Extensive and expanding range, incl. fish, fresh meat, milk and dairy products, eggs
Waitrose Doncastle Road Southern Industrial Area, Bracknell GB-Berkshire RG12 8YA Tel.: +44-1344 424680 Fax: +44-1344 825072	Fresh fruit and vegetables, fresh herbs, baby food, beer, wine, cider, cereal products (bread, bakery products, muesli, oat flakes, flour, pasta, rice), chilled products (cooked meat, fresh pasta, soups, fresh salads and fruit juices), dairy products, eggs, fresh meat and meat products, fish, deep-frozen products (burgers, ice cream, peas, yoghurt), processed fruit and vegetables (canned tomatoes, fruit and vegetable juices, jams and marmalades, canned beans), sweeteners (brown sugar, honey), chocolate, cocoa, drinking chocolate, coffee, teas (including herbal teas), cooking oils (e.g. olive oil), soya drinks, pet food
Tesco Tesco House Delamare Road, Cheshunt GB-Hertfordshire EN8 9SL Tel.: +44-1992 632222 Fax. +44-1992 644747	Extensive range, incl. fresh fruit and vegetables, meat, cereal products (including bread)
Safeway Argyll House 6 Millington Road, Hayes GB-Middlesex UB3 4AY Tel.: +44-171695 6000 Fax: +44-171 695 7610	Extensive range
Marks & Spencer Michael House 46–47 Baker Street GB-London W108EP Tel.: +44 2079 354422 Fax: +44 8287 4872679 www.marks-spencer.co.uk	Fresh fruit and vegetables, bread, dairy products, convenience products (soups, pizzas, poultry and pasta dishes), meat, eggs, cereal products, desserts, sandwiches
Asda Asda House, Great Wilson Street GB-Leeds LS 11 5AD Tel.: +44-1132 435435 Fax: +44-1132 418304	Expanding organic range. Fresh products, incl. meat

Organic Supermarkets	Organic Range
Planet Organic 42 Westbourne Grove GB-London W2 5SH Tel.: +44-207 221 7171 Fax: +44-171 221 1923	Fresh and processed products, extensive range (over 4000 organic products)

Health and Organic Food Stores	Organic Range
Holland & Barrett 61, The Broadway West Ealing GB-London W13 9BP Tel.: +44 - 20 8840 7558	Processed organic products (grains, raisins, pasta, dried leguminous vegetables)

Food Processors

Firm	Organic Range
Doves Farm Foods Salisbury Road, Hungerford GB-Berkshire RG17 0RF Tel.: +44-1488 684880 Fax: +44-1488 685235	Organic Range
Shipton Mill Ltd Frampton Mill Frampton on Severn Industrial Park GB-Tetbury Gloucestershire GL8 8RP Tel.: +44 - 1452 740408	Cereal products, especially breakfast cereals
Morning Foods Ltd Suites 51/52, The Hop Exchange, 24 Southwark St GB-London SE1 1TY	Cereal products
Yeo Valley Farms (Production) Ltd Lag Farm Blagdon GB-Bristol Avon BS40 7SG Tel.: +44 - 1761 462798	Cereal products
Baby Organix Organix Brands plc No. 4 Fairfields Close, Christchurch GB-Dorset BH23 1QZ Tel.: +44-1202 479701 Fax: +44-1202 479712	Dairy products (yoghurt)
Hipp Nutrition UK 765 Main Street, Newbury New Greenham Park Newbury GB-Berkshire RG19 6HN Tel.: +44-1635 528250 Fax: +44-1635 528271	Chocolate, drinking chocolate powder, chocolate ice cream
Whole Earth Foods 292 Portobello Road GB-London W11 1LR Tel.: +44-171 229 7545 Fax: +44-171 221 6416 100520.416@compuserve.com www.earthfoods.co.uk	Baby food Bean dishes, jams and marmalades, peanut butter, chocolate, ketchup (all with reduced sugar and salt content) etc.

Government Bodies

Ministry of Agriculture, Fisheries and Food
Nobel House, 17 Smith Square
GB-London SW1P 3JR
Tel.: +44-171 238 5803
Fax: +44-171 238 6148

Organic Farming Branch, Imports Section DEFRA
Area 5F, Ergon House
Horseferry Road
GB-London SW1P 2AL
organic.imports@defra.gsi.gov.uk
www.defra.gov.uk/farm/organic/imports/imports.htm

United Kingdom Register of Organic Food Standards (UKROFS)
Nobel House, 17 Smith Square
GB-London SW1P 3JR
Tel.: +44-171 238 6004
Fax: +44-171 238 6533

General adress:

DEFRA, Department for Environment, Food & Rural Affairs
Nobel House, 17 Smith Square
GB-London SW1P 3JR
www.defra.gov.uk/farm/organic
Tel.: 020 7 238 6000 switchboard
From outside the UK the telephone number is +44 (0) 20 7238 6951.
There is also a minicom/textphone number for the deaf and hard of hearing: 0845 300 1998.
The general helpline email address is:
helpline@defra.gsi.gov.uk

Label Programmes and Certification Bodies

Bio-Dynamic Agricultural Association
Old Painswick Project
Gloncester St
GB-Strad Gloncestershire GL5 1QG
Tel.: +44 1453 759501

Organic Farmers and Growers
50 High Street, Soham, Ely
GB-Cambridgeshire CB7 5HF
Tel.: +44-1353 720250

Organic Food Federation
31, Turbine Way
GB-Swaffham Norfolk PE37 7XD
Tel.: +44-1760 720 444
Fax: +44-1760 720 790
organicfood@freenet.co.uk

Scottish Organic Producer Association
Suite 15
Software Centre
Stirling University
Innovation Park
GB-Stirling FK9 4FN
Tel.: +44-1786 458 090
Fax: +44-1786 458 091

The Soil Association
40–56 Victoria Street
GB-Bristol BS1 6BY
Tel.: +44-117 929 0661
Fax: +44-117 925 2504
fblake@soilassociation.org

Annex V

Swiss Federal Office for Agriculture (Bundesamt für Landwirtschaft) forms: "Imports of organic products"

The forms can be downloaded from the following website:
http://www.blw.admin.ch

under columns; import; organic agriculture the different information and forms can be downloaded; such as:

1. **Dossier about the imports of organic products**
2. **The guidance and application form for individual authorization to market imported organic farming products in Switzerland**
3. **The checklist for equivalence to partially converted holdings**
4. **The attestation for equivalence to imports of organic products**
5. **Additional products to imports of organic products**
6. **Details of inspection / certification bodies**
7. **Extract of the certificate of inspection**
8. **Swiss certification / inspection bodies**

Notes:

Notes:

Annex VI

BIO SUISSE forms: “BIO SUISSE Checklist”

The forms can be downloaded from the following website:
http://www.bio-suisse.ch

or directly under:
http://www.bio-suisse.ch/media/en/pdf2003/checklist_individual_producers.pdf

Annex VII

Sources

1. BIO SUISSE (2003): **Facts and Trends 2003** (Medientext of the Medienkonferenz of 25 March 2003). Published by BIO SUISSE, Basel, Switzerland.

2. Buley, M., P. Grosch & S. Vaupel (1997): **Exporting Organic Products – Marketing Handbook**. Edited by K. Clark, GTZ Language Services. Published by Protrade – Dept. Organic Products and Fine Foods, GTZ, Eschborn, Germany. 212 pp.

3. Consorzio per il Controllo dei Prodotti Biologici (2003): **L'evoluzione del Biologico – Ricerca, Produzione e Mercato**. CCPB publication.

4. Rundgren, G. & W. Lockeretz (2002): **IFOAM Conference on Organic Guarantee Systems – International Harmonisation and Equivalence in Organic Agriculture 17–19 Feb. 2002 – Reader**. Published by IFOAM. 68 pp.

5. Kilcher L. (2000): **Development and Perspectives in the Market for Organic Fruit Juices from Tropical and Subtropical Countries, in:** Fruit Processing 12/2000, S. 466 ff

6. Kilcher L. (2002): **Potencial del mercado Europeo para productos orgánicos de Chile. In: „Memorias Seminario Agricultura organica en Chile"**. Universidad Austral de Valdivia, Marzo 2002. 39–42 pp.

7. Kilcher L. (2002): **Biofruchtsäfte aus tropischen und subtropischen Ländern – Entwicklung und Perspektiven**. In: „Flüssiges Obst" 7/2002, 444–448 pp.

8. Kilcher L. (2002): **El mercado para café orgánico. In: Café y Cacao**. Vol. 3, No. 1, 2002, Habana (Cuba), page 5 ff.

9. Kortbech-Olesen., R. (2003): **Overview on world trade in organic food products, the US market and recent trends**. UNCTAD/WTO presentation at BIOFACH Congress Nuremberg, Germany.

10. Kortbech-Olesen, R., C. H. Haest, B. T. Jacobsen, J. Pakenham-Walsh, et al. (1999): **Organic Food and Beverages: World Supply and Major European Markets**. Published by ITC – International Trade Centre UNCTAD/WTO, Geneva, Switzerland. 271 pp.

11. Hamm, U., F. Gronefeld & D. Halpin (2002): **Analysis of the European market for organic food – Organic market Initiatives and Rural Development Volume 1**. Published by The University of Wales, Aberystwyth, United Kingdom. 157 pp.

12. Richter, T. & G. Hempfling (2003): **Supermarket Study 2003 – Organic Products in European Supermarkets**. Published by Research Institute of Organic Agriculture (FiBL), Frick. 180 pp.

13. UNCTAD (2003): **Organic Fruit and Vegetables from the Tropics – Marketing, Certification and Production Information for Producers and International Trading Companies**. Published by United Nations, Geneva. 308 pp.

14. Willer, H. & Yussefi, M. (2000): **Ökologische Agrarkultur weltweit**. SÖL-Sonderausgabe Nr. 74, D-Bad Dürkheim, 85 pp.

15. Willer, H. & Richter, T. (2003): **FiBL – Statistics-Provisional figures of a FiBL survey in Nov. 2003.**

16. Yussefi, M. & Willer, H. (Eds.) (2003): **The World of Organic Agriculture – Statistics and Future Prospects 2003**. Published by IFOAM – International Federation of Organic Agriculture Movements. Oekozentrum Imsbach DE-66636, Tholey-Theley. 127 pp.

SIPPO (Swiss Import Promotion Programme) is the import promotion programme under the patronage of the State Secretariat for the Economy of the Swiss government. It supports small and medium-sized companies and cooperatives in emerging markets and markets in transition to access the Swiss market as well as markets in the European Union.

SIPPO objectives are:

- to enhance the exporting skills of small and medium-sized companies with respect to product quality and export marketing
- to increase the number and quality of small and medium-sized company trade contacts with Swiss/EU importers
- to improve the level of information of Swiss/EU importers on new sourcing markets in the partner countries
- to strengthen the skills of and to include trade institutions and branch associations into the trade development process

SIPPO's services include:

- business branch-related market information
- advisory services for products and marketing
- promotion in Switzerland and EU
- assistance at selected European trade fairs

At the same time, Swiss companies are informed about the requests for contact received from foreign companies and are given support in their search for new sourcing markets, products and cooperation partners.

Swiss Import Promotion Programme
Stampfenbachstrasse 85
CH-8006 Zurich
Tel. +41 1 365 52 00, Fax +41 1 365 52 02
E-mail: info@sippo.ch, Internet: www.sippo.ch