



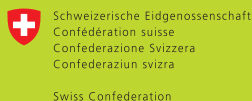
FiBL AND IFOAM

THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2011



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Training Manual for Organic Agriculture in the Humid Tropics (242 pages and 199 slides)
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The World of Organic Agriculture Statistics and Emerging Trends 2011

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Foreword from ITC and SECO

One of the world's greatest challenges is to guarantee food security for the world's growing population whilst also ensuring greater sustainability of food production, trade, and consumption.

Agriculture has made many technological advances, increasing its level of productivity and thus creating wealth in rural areas and lowering the price of food. However, the successful growth of the sector has been accompanied by widespread concern over food safety scares, damage to workers' health and the loss of biodiversity from intensified agriculture.

The successful transformation of organic agriculture from a series of scientific experiments in the 1950s to a US\$ 55 billion industry today can be partially attributed to these concerns: consumers are willing pay more for a way of farming that promotes healthy agroecosystems and avoids the use of agrochemicals.

Policymakers similarly see the social and economic value of a production system that generates environmental benefits, like agrobiodiversity and carbon sequestration, avoids the need for workers to handle pesticides and does not impose environmental costs on the taxpayer, like cleaning up water pollution.

Organic agriculture also has a role in achieving development objectives with developing countries exporting premium price tropical and counterseasonal crops to developed countries.

There is still considerable potential for organic agriculture to grow but it requires a more favourable policy environment. For this to happen, policy makers, civic society, and the private sector rely upon credible information to support their decision-making.

The *World of Organic Agriculture 2011* serves this need with an overview of the production and trade of organic products across the globe and an analysis of regulations, standards, policies, and market trends. This type of information is difficult to find but is crucially important to help support the sector's development. *The World of Organic Agriculture 2011* provides a unique global service in this regard and so makes an important contribution to bringing about greater sustainability in trade and agriculture in both the developed and developing world.

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Foreword from FiBL and IFOAM

Data collection is a major concern of the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM). The comprehensive data provided in this publication serve as an important tool for stakeholders, policy makers, authorities, and the industry, as well as for researchers and extension professionals. The information provided here has proven useful in development programs and supporting strategies for organic agriculture and markets, and crucially, for monitoring the impact of these activities.

With this edition, FiBL and IFOAM are presenting *The World of Organic Agriculture* for the twelfth time. The data and information compiled in this volume document the current statistics, recent developments and trends in global organic farming. The statistical information and all chapters have been updated. Furthermore, for this edition a large number of country reports was compiled.

We would like to express our thanks to all authors and data providers for contributing in-depth information and figures on their region, their country or their field of expertise.

We are grateful to the International Trade Centre (ITC) and the Swiss State Secretariat for Economic Affairs (SECO)/Economic Development and Cooperation for their support for this project, which will help to expand and improve the data collection and processing activities in the future.

Furthermore, we are happy to count on the continuous support of NürnbergMesse, the organizers of the BioFach World Organic Trade Fair.

Bonn and Frick, February 2011

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www.biofach.de, www.nuernbergmesse.de

Abbreviations

AMI: Agricultural Market Information Service (Agrarmarkt Informations-Gesellschaft), Bonn, Germany

APEDA: Agricultural & Processed Food Products Export Development Authority, India

AQIS: Australian Quarantine and Inspection Service, Canberra, Australia

BMELV: Ministry of Food, Agriculture and Consumer Protection, Berlin, Germany, www.bmelv.de

CACC: Certification, Accreditation and Compliance Committee of the US National Organic Standards Board (NOSB)

CNCA Certification and Accreditation Administration of the People's Republic of China, Beijing, China

CBTF: Capacity Building Task Force on Trade, Environment and Development of the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Environment Programme (UNEP)

EPOPA: Export Promotion of Organic Products from Africa

EquiTool: Guide for Assessing Equivalence of Standards and Technical Regulations, developed by ITF

EU: European Union

FAO: Food and Agriculture Organization of the United Nations, Rome, Italy

FiBL: Research Institute of Organic Agriculture, Switzerland

GOMA: Global Organic Market Access project of FAO, IFOAM, and UNCTAD

GTZ: German Society for Technical Cooperation and Development, Germany

IAASTD: International Assessment of Agricultural Knowledge, Science and Technology for Development

IAMB: Mediterranean Agronomic Institute of Bari, Italy

ICROFS: International Center for Research in Organic Food Systems, Denmark

IFAD: International Fund for Agricultural Development

IFOAM: International Federation of Organic Agriculture Movements, Bonn, Germany

IFPRI: International Food Policy Research Institute

IOAS: International Organic Accreditation Service

IROCB: International Requirements for Organic Certification Bodies of the ITF

ITF: International Task Force on Harmonization and Equivalence in Organic Agriculture

ITC: International Trade Centre, Geneva, Switzerland

JAS: Japan Agricultural Standard
MOAN: Mediterranean Organic Agriculture Network, Italy
NOGAMU: National Organic Agricultural Movement of Uganda
Norad: Norwegian Agency for Development Cooperation
NOSB: US National Organic Standards Board (USA)
NGO: Non-governmental organization
NOP: National Organic Program of the United States
ORC: The Organic Research Centre Elm Farm, UK
ORCA: Organic Research Centres Alliance, c/o FAO, Rome, Italy
OTA: Organic Trade Association, com, USA
SECO: Swiss State Secretariat for Economic Affairs, Berne Switzerland
SENASA: Servicio Nacional de Sanidad y Calidad Agroalimentaria, Buenos Aires, Argentina
SIDA: Swedish International Development Cooperation Agency
SME: Small and Medium-sized Enterprises
UNCTAD: United Nations Conference on Trade and Development
UNEP: United Nations Environment Programme
UNESCO: United Nations Educational, Scientific and Cultural Organization
USDA: United States Department of Agriculture, Washington, US, www.usda.gov
WTO: World Trade Organization

ABBREVIATIONS

Organic Agriculture 2011: Key Indicators and Leading Countries

Indicator		Leading countries 2009
Countries with data on certified organic agriculture 2009 ¹	2009: 160 countries (2008: 154; 2000: 86)	
Organic agricultural land 2009	37.2 million hectares (2008: 35.2, 1999: 11)	Australia (12 million ha), Argentina (4.4 million ha), US (1.9 million ha)
Number of countries with more than five percent organic agricultural land 2009	24 countries (2008: 22); More than ten percent: 7 countries (2008: 6 countries)	Falkland Islands (Malvinas) (35.7 %), Liechtenstein (26.9 %), Austria (18.5 %)
Further, non-agricultural organic areas 2009	41.9 million hectares (2008: 31 million)	Finland (7.8 million ha), Brazil (6.2 million ha); Cameroon (6 million ha).
Producers 2009	1.8 million producers (2008: 1.4 million)	India (677'257), Uganda (187'893), Mexico (128'826)
Organic market size 2009	54.9 billion US dollars or 40 billion euros (2008: 50.9 billion US dollars; 1999: 15.2 billion)	US (17.8 billion euros), Germany (5.8 billion euros), France (3 billion euros)
Number of countries with organic regulations 2010	74 countries (2008: 73 countries)	
Organic certifiers 2010	523 certifiers (2008: 489)	Japan, USA, South Korea
Number of IFOAM affiliates 2011	1.1.2011: 757 affiliates (2008: 734 affiliates 2000: 606 affiliates)	Germany: 98 affiliates; United States: 45 affiliates; India: 44 affiliates

Source: FiBL and IFOAM; for total global market: Organic Monitor; for certifiers: Organic Standard/Grolink.

¹ Where the designation "country" appears in this book, it covers countries or territories.

The World of Organic Agriculture 2011: Summary

HELGA WILLER¹

Organic agricultural land and farms as well as the global market continued to grow in many countries during 2009.

Current status of organic agriculture

According to the latest FiBL/IFOAM survey on certified organic agriculture worldwide (data as of end of 2009, see page 33), statistical information on organic agriculture is now available from 160 countries, an increase of six countries since the last survey.

There are 37.2 million hectares of organic agricultural land (including in-conversion areas). The regions with the largest areas of organic agricultural land are Oceania (12.2 million hectares), Europe (9.3 million hectares), and Latin America (8.6 million hectares). The countries with the most organic agricultural land are Australia, Argentina, and the United States.

Currently 0.9 percent of the world's agricultural land is organic. However, some countries reach far higher shares: Falkland Islands (35.7 percent), Liechtenstein (26.9 percent), and Austria (18.5 percent). Seven countries have more than ten percent organic land.

Compared with the previous survey, organic land increased by two million hectares or six percent. Growth was strongest in Europe, where the area increased by almost one million hectares. The countries with the largest increases were Argentina, Turkey, and Spain.

Apart from agricultural land, there are further organic areas, most of these being areas for wild collection. These areas constitute 41.9 million hectares and have increased by 10 million hectares since 2008.

There were 1.8 million producers in 2009, an increase of 31 percent since 2008, mainly due to a large increase in India. Forty percent of the world's organic producers are in Asia, followed by Africa (28 percent), and Latin America (16 percent). The countries with the most producers are India (677'257), Uganda (187'893), and Mexico (128'862).

Almost two-thirds of the organic agricultural land of 37.2 million hectares in 2009 was grassland/grazing areas (23 million hectares). With a total of at least 5.5 million hectares, arable land constitutes 15 percent of the organic agricultural land. An increase of 13.2 percent compared with 2008 was reported. Most of this category of land is used for cereals including rice (2.5 million hectares), followed by green fodder from arable land (1.8 million hectares), and vegetables (0.22 million hectares). Permanent crops account for approximately six percent of the organic agricultural land, amounting to 2.4 million hectares. Compared with the previous survey, almost half a million hectares more were reported. The most important crops are coffee (with 0.54 million hectares reported, constituting one-fifth of the organic permanent cropland), followed by olives (0.49 million hectares), cocoa (0.26 million hectares), nuts (0.2 million hectares), and grapes (0.19 million hectares).

¹ Dr. Helga Willer, Communication, Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Internet www.fibl.org

Global market

According to Organic Monitor, the global market for organic food and drink is recovering from the repercussions of the economic crisis. Single-digit market growth was observed for the first time in 2009 because of the economic slowdown reducing industry investment and consumer spending power. Organic food and drink sales expanded by roughly five percent to 54.9 billion US dollars¹ in 2009. Global revenues have increased over three-fold from 18 billion US dollars in 2000 and double-digit growth rates were observed each year, except in 2009. Healthy growth rates are envisaged to restart as consumer spending power rises and as more countries come out of economic recession (see article by Amarjit Sahota, page 62). The countries with the largest markets are the US, Germany, and France; the highest per capita consumption is Denmark, Switzerland, and Austria (see article on the global survey on organic agriculture, page 33.)

Africa

In Africa, there are slightly more than one million hectares of certified organic agricultural land. This constitutes about three percent of the world's organic agricultural land. There were 500'000 producers reported. The countries with the most organic land are Uganda (226'954 hectares), Tunisia (167'302 hectares), and Ethiopia (122'727 hectares). The highest shares of organic land are in Sao Tome and Principe (6.5 percent), Sierra Leone (1.8 percent), and Uganda (1.7 percent). The majority of certified organic produce in Africa is destined for export markets; in Uganda the export value for organic products was 37 million US dollars in 2009/2010 (see article by Charity Namuwoza and Hedwig Tushemerirwe, page 117). The European Union, as the major recipient of these exports, is Africa's largest market for agricultural produce. Tunisia was accepted under the EU's Third Country List in 2009 (see article by Lukas Kilcher and Samia Maamer Belkhiria, page 111). Organic agriculture has a significant role to play in addressing the pressing problems of food security and climate change in Africa. It is therefore very important that national and regional policies in Africa do not overlook the benefits provided by organic agriculture.

The second African Organic Conference to be held in Lusaka, Zambia, from May 15-19, 2012 will provide a key platform for discussion and sharing experiences. Moreover, this conference will provide a significant opportunity to mobilize support for organic agriculture and take the necessary actions to bring the organic agenda to new heights in Africa (see article by Hervé Bouagnimbeck, page 104).

Asia

The total organic agricultural area in Asia is nearly 3.6 million hectares. This constitutes ten percent of the world's organic agricultural land. There were 731'315 producers reported. The leading countries by area are China (1.9 million hectares) and India (1.2 million hectares). Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent). The region hosts a wide range of organic sector development scenarios, from early development to highly regulated. Far from the marginal position it held previously, organic is now an accepted concept and growing market trend in the region. Whilst export remains the dominant feature of sector development in the majority of developing countries in the region, local markets have emerged and are gaining ground. Primarily a market driven sector, government policy is an emerging and significant sector

¹ 1 US dollar = 0.71895 Euros; average exchange rate 2009, Source: <http://www.oanda.com/lang/de/currency/average>

development factor today in many countries. Although domestic market size is still relatively small, the high value and profile associated with organic has led to civil society (consumer) calls and governments' interest to regulate the sector. Seven markets have implemented organic labeling regulations (i.e., China, India, Japan, South Korea, Philippines, Taiwan, and Malaysia). Others, Sri Lanka and Nepal have established government competent authorities. Thailand and Indonesia have also established accreditation systems (see article by Ong Kung Wai, page 122). A major event—The 16th IFOAM Organic World Congress—will be held in Korea in autumn 2011. See also country reports (starting page 128) on Armenia by Nune Darbinyan, on China by Yuhui Qiao, on Indonesia by Lidya Ariesusanty, on Kazakhstan by Evgeniy Klimov and on South Korea by Dong-Geun Choi.

Europe

As of the end of 2009, 9.3 million hectares of agricultural land in Europe were managed organically by more than 250'000 farms. In Europe, 1.9 percent of the agricultural area, and in the European Union 4.7 percent of the agricultural area is organic. Twenty-five percent of the world's organic land is in Europe. Compared to 2008, organic land increased by nearly one million hectares. The countries with the largest organic agricultural area are Spain (1.3 million hectares), Italy (1.1 million hectares) and Germany (0.95 million hectares). There are five countries now in Europe with more than ten percent organic agricultural land: Liechtenstein (26.9 percent), Austria (18.5 percent), Sweden (12.6), Switzerland (10.8 percent), and Estonia (10.5 percent).

Sales of organic products were approximately 18'400 million euros in 2009. The market grew at smaller rates than in previous years even though some countries like France and Sweden showed strong growth. The largest market for organic products in 2009 was Germany with a turnover of 5'800 million euros, followed by France (3'041 million euros) and the UK (2'065 million euros). As a portion of the total market share, the highest levels have been reached in Denmark, Austria and Switzerland, with five percent or more for organic products (see article by Schaack et al. page 156). The highest per capita spending is also in these countries.

Support for organic farming in the European Union and neighboring countries includes grants under rural development programs, legal protection, and the European as well as national action plans. An updated overview of European action plans shows that currently 26 action plans (including regional action plans) are in place (see article by Gonzalez et al., page 160). A major development in 2010 was the launch of the new European logo for organic food (see article by Helga Willer, page 150). European country reports include a report about Switzerland by Lukas Kilcher (page 169) and one about Ukraine by Natalie Prokopchuk and Tobias Eisenring (page 173).

Latin America

In Latin America, more than 280'000 producers managed 8.6 million hectares of agricultural land organically in 2009. This constitutes 23 percent of the world's organic land and 1.4 percent of the regions agricultural land. The leading countries are Argentina (4.4 million hectares), Brazil (1.8 million hectares), and Uruguay (930'965 hectares). The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.7 percent), the Dominican Republic (8.3 percent), and Uruguay (6.3 percent). Most organic products from Latin American countries are sold on the European, North American or Japanese markets. Popular goods are especially those that cannot be produced in these regions, as well as off-season

products. Thus, the development of robust local markets is still a major challenge, without which the sustainability of organic production cannot be achieved. Important crops are tropical fruits, grains and cereals, coffee, cocoa, sugar, and meats. Most organic food sales in the domestic markets of the countries occur in major cities. Eighteen countries have legislation on organic farming, and five additional countries are currently developing organic regulations. Costa Rica (see article by Roberto Azofeifa on page 194) and Argentina have both attained Third Country status according to the EU regulation on organic farming. The types of support in Latin American countries range from organic agriculture promotion programs to market access support by export agencies (see article on Latin America by Salvador Garibay, Roberto Ugas and Patricia Flores, page 182 and on Chile by Pilar Eguillor Recabarren, page 191).

North America

In North America, almost 2.7 million hectares are managed organically, of these nearly two million in the United States and 0.7 million in Canada, representing approximately 0.7 percent of the total agricultural area in the region and 7 percent of the world's organic agricultural land.

US sales of organic products continued to grow during 2009 despite the distressed state of the economy. In fact, organic product sales in 2009 grew by 5.3 percent overall, to reach 26.6 billion US dollars.¹ Of that figure, 24.8 billion US dollars represented organic food or 3.7 percent of the food market. The remaining 1.8 billion were sales of organic non-foods. On the Canadian front, Agriculture and Agri-Food Canada in 2010 released a new report on the Canadian organic sector's trade data and retail sales. Analyzing the 2008 sales of organic foods, the report concludes that the total Canadian organic market is now worth 2 billion Canadian dollars annually.² Projections for 2010 and beyond indicate higher growth rates for organic sales in North America.

Regarding legislation, representatives from the Canada Organic Office and the US National Organic Program have completed a full peer review, in order to monitor and evaluate how the US-Canada organic equivalence arrangement is being applied (see articles by Barbara Haumann, page 205; and Matthew Holmes and Anne Macey, page 211).

Oceania

This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu. Altogether, there are 8'466 producers, managing 12.2 million hectares. This constitutes 2.8 percent of the agricultural land in the area and 33 percent of the world's organic land. Ninety-nine percent of the organic land in the region is in Australia (12 million hectares, 97 percent of which is extensive grazing land), followed by New Zealand (124'000 hectares), and Vanuatu (8'996 hectares). The highest shares of all agricultural land are in Samoa (7.9 percent), followed Vanuatu (6.1 percent), the Solomon Islands (4.3 percent), and Australia (2.9 percent). Growth in the organic industry in Australia, New Zealand and the Pacific Islands has been strongly influenced by rapidly growing overseas

¹ 1 US dollar was 0.71895 euros in 2009, and 0.75464 in 2010 Average exchange rate according to www.oanda.com

² 1 Canadian dollar = 0.63046 euros, average exchange rate 2008; source: www.oanda.com/lang/de/currency/average

demand; domestic markets are, however, also growing. In Australia it was at 947 Australian dollars¹ in 2009 and in New Zealand at 350 million New Zealand dollars.²

The biggest change in the Australian domestic market over 2009 was that the Australian Standard for Organic and Biodynamic Products was adopted and published by Standards Australia. Now that the Australian Standard has been published, the organic industry and the authority in charge, the Australian Quarantine and Inspection Service, are working towards a situation where one standard can be used for the domestic and export market (see article on Australia by Els Wynen et al., page 218).

The year 2010 marked a milestone for the Pacific Region as the International Organic Accreditation Service (www.ioas.org) has assessed the Pacific Organic Standard (POS) and found it to be equivalent to the standards requirements of the European Union's organic regulations. This means that, according to the IOAS, the Pacific Organic Standard is suitable for use by conformity assessment bodies in the Pacific region as a standard for the certification of operators who may wish to export products to the European Union.

Most of the organically certified products from the region are for export. Generally, the domestic markets for organically certified products are not very developed and in some cases are non-existent. Organic products are commonly sold as conventional without a price premium. Interesting opportunities are now being explored within the tourist structures of several countries that are facing a growth in the presence of tourists (e.g., Fiji, Cooks, and Samoa) focusing on development of Pacific cuisine and linking small holder organic farmers directly with tourist and hospitality providers. While there is no regional policy for organic agriculture, the Secretariat of the Pacific Community developed a specific policy brief in 2009 to assist governments and others in the region to develop relevant policy. The policy brief focuses on how organic agriculture can assist in meeting regional challenges and outlines seven initial policy recommendations (see chapter by Karen Mapusua, page 223).

Standards and regulations

The year 2010 has been a year of consolidation in the field of standards and regulations.³ The new EU regulation on organic production as well as the Canadian organic standard have been implemented, and the details for Canada and the US—the world's first fully reciprocal agreement between regulated organic systems—have been clarified. Regulations in new countries have only been adopted in Malaysia, but a fair amount of countries especially in Africa are in the process of elaborating legislations on organic agriculture. According to the FiBL survey on organic rules and regulations, the number of countries with organic standards has increased to 74, and there are 27 countries that are in the process of drafting a legislation (see article by Huber et al., page 68).

There has been modest growth in the number of certification bodies in most regions, it has, however, increased rapidly in some European countries because international certification

¹ 1 Australian dollar = 0.56599 euros in 2009; average annual exchange rate 2009; Source: <http://www.oanda.com/lang/de/currency/average>

² 1 New Zealand dollar = 0.45376 Euros in 2009, average exchange rate; average annual exchange rate 2009; Source: <http://www.oanda.com/lang/de/currency/average>

³ For a brief history of organic standards and regulations see www.organic-world.net/rules.html as well as previous versions of this article as published in the various editions of *The World of Organic Agriculture*. These can be downloaded at www.organic-world.net/former-editions.html.

bodies have started branch offices that have gained approval by, for example, the EU or the local government. The total number of certification bodies is 532, up from 489 in 2009. Most certification bodies are in the European Union, the United States, Japan, South Korea, China, Canada, and Brazil (see article by Kolbjörn Örjavik, page 78).

In 2009, FAO, IFOAM and UNCTAD started the Global Organic Market Access (GOMA) project. Activities in 2010 included the promotion of south-south cooperation on organic agriculture in Asia and in Central America as well as consultations on objectives and related practice requirements for organic standards (see article by Sophia Twarog, page 76).

A growing number of organic producers across the world are verified for the local market through Participatory Guarantee Systems (PGS). There are now PGS initiatives on all continents, with Latin America and India being the leaders in terms of the number of farmers involved. In the year 2010, important steps were taken in increasing official recognition of PGS by governments, most notably in Brazil and in India (see article by Joelle Katto, page 82).

The organic sector faces the challenge of an increasing number of other standards and brands competing for green and ethical segments of the consumer market. While sales of organically certified products have grown, the sector has to face new market entrants making green and ethical claims. The article from Oliver von Hagen und Alexander Kasterine (page 84) outlines the nature of competition to organic from other sustainability labels and initiatives and the strategic responses the sector can make.

A recent study conducted by FiBL reviewed the current state of empirical research on environmental, social, and economic impacts of sustainability certification in the agricultural sector. According to this study, sufficient evidence is available for organic agriculture, which shows a wide-range of environmental and economic benefits (but with an emphasis on the western world). For fairtrade, most studies on social and economic benefits report positive impacts on producers in developing countries (see paper by Jawtusich et al., page 88).

Organic beekeeping

For the first time, an overview of organic beekeeping is presented in *The World of Organic Agriculture*. In the article of Garibay et al. (page 94) a general overview is given, including statistical information, obtained at the First World Conference on Organic Beekeeping that took place in Bulgaria in 2010. The next conference on organic beekeeping will be organized by FiBL, Naturland, and local partners in Mexico in 2012.

Developments within IFOAM

The IFOAM Inspiration for Living Change Declaration, which was publicly affirmed by a dozen laureates of the Alternative Nobel Prize, the World Food Prize and the One World Organic Lifetime Achievement Award, outlines the importance of reforming national and international policies to advance organic agriculture

IFOAM has three campaigns advocating for organic solutions: the “People before Commodities” campaign focuses on Food Security, “Powered by Nature” focuses on Biodiversity, and “Not just Carbon” is on Climate Change.

All these campaigns see eco-intensification as the common strategy to develop agriculture in the 21st century. Besides the aforementioned declaration and campaigns, IFOAM initiated a new tool to lead the organic movement called “camps,” which are workshops to build

participatory strategies for stakeholders. Campaigns on fairtrade, nanotechnology, food sovereignty or aid effectiveness will also be pursued, as soon as donors and stewards for those topics can be identified. Another element that leads the organic movement towards the facilitation of development is the best practice standard, decided upon by the IFOAM membership in July 2010 as part of the Organic Guarantee System. IFOAM, with the “International Association of Partnership (IAP),” is showing a way to position organic as a development model for the sustainability of rural livelihoods in poor and rich countries.