All of the statements and results contained in this book have been compiled by the authors and are to
the best of their knowledge correct and have also been scrupulously checked by the Research Institute
of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements
(IFOAM). However, the possibility of mistakes cannot be ruled out entirely. Therefore, the editors,
authors and publishers are not subject to any obligation and make no guarantees whatsoever regard-
ing any of the statements or results in this work; neither do they accept responsibility or liability for
any possible mistakes, nor for any consequences of actions taken by readers based on statements or
advice contained therein.
Authors are responsible for the content of their own articles. Their opinions do not necessarily ex-
press the views of IFOAM or FiBL.
This document has been produced with the support of the International Trade Centre (ITC), the Swiss
State Secretariat for Economic Affairs (SECO), and NürnbergMesse. The views expressed herein can
in no way be taken to reflect the official opinions of ITC, SECO or NürnbergMesse.

Should corrections and updates become necessary, they will be published at www.organic-
world.net.
Figures, graphs, statistics as well as selected chapters from this book are available for download
at www.organic-world.net. Some of these are publicly accessible. Others are password protected
and have the username: ‘organic2011’ and the password ‘organicworld’.

Any enquiries regarding this book and its contents should be sent to Helga Willer, FiBL, Ackerstrasse,
CH-5070 Frick, e-mail helga.willer@fibl.org.

Please quote articles from this book individually with name(s) of author(s) and title of article. The
whole report should be cited as:

Willer, Helga and Lukas Kilcher (Eds.) (2011)
IFOAM, Bonn and FiBL, Frick

Die Deutsche Bibliothek – CIP Cataloguing-in-Publication-Data
A catalogue record for this publication is available from Die Deutsche Bibliothek

© 2011 FiBL and IFOAM
Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Switzerland, Tel. +41 62
865 72 72; Fax +41 62 865 72 73, E-mail info.suisse@fibl.org, Internet www.fibl.org
International Federation of Organic Agriculture Movements (IFOAM) e.V., Charles-de-Gaulle-Str. 5,
53113 Bonn, Germany, Tel. +49 228 926 50-10, Fax +49 228 926 50-99, E-mail
headoffice@ifoam.org, Internet www.ifoam.org, Trial Court Bonn, Association Register no. 8726

Language Editing: Claudia Frieden, FiBL, Frick, Switzerland and Catherine Reynolds, IFOAM Bonn,
Germany
Layout: Helga Willer, FiBL, Frick, Switzerland
Cover & Maps: Claudia Kirchgraber, FiBL, Frick, Switzerland
Cover picture: Bananas from the small farmers’ cooperative APPTA in the South of Costa Rica. Pic-
ture: Paolo van den Berge, FiBL, Frick, Switzerland
Graphs (if not otherwise stated): Helga Willer, FiBL, Frick, Switzerland
Printed by Medienhaus Plump, Rolandsecker Weg 33, 53619 Rheinbreitbach, Germany
Price: 50 Euros, IFOAM members: 25 Euros
Printed copies of this volume may be ordered directly from IFOAM and FiBL (see addresses above) or
via the IFOAM website at www.ifoam.org, the FiBL shop at www.fibl.org/shop.
ISBN 978-3-940946-83-6 (IFOAM) and ISBN 97-3-03736-192-4 (FiBL)
Table of contents

Foreword from ITC and SECO 13
Foreword from FiBL and IFOAM 15
Acknowledgements 16
Sponsors 21
Abbreviations 22
Organic Agriculture 2011: Key Indicators and Leading Countries 25
The World of Organic Agriculture 2011: Summary 26
Helga Willer

Organic Agriculture Worldwide: The Results of the Global Survey on Organic Agriculture 33
Organic Agriculture Worldwide – The Results of the FiBL/IFOAM Survey 34
Helga Willer

› Organic agricultural land
› Related tables
› Shares of organically managed agricultural land by region and country
› Growth of the organic agricultural land
› Other organic areas
› Wild collection and beekeeping
› Organic producers and other operator types 2009
› Further operator types
› Domestic market values
› Land use and crop data
› Arable land
› Permanent crops
› Land use in the regions
› Organic farming in developing and transition countries and in emerging markets
› Data collection on organic agriculture worldwide: background

Global Market 61
The Global Market for Organic Food & Drink 62
Amarjit Sahota

› 1 Introduction
› 2 Europe
› 3 North America
› 4 Asia
› 5 Oceania
› 6 Other Regions
› 7 Conclusions
## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Standards and Regulations</th>
<th>67</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standards and Regulations</td>
<td>68</td>
</tr>
<tr>
<td>Beate Huber, Otto Schmid, Gbati Napo-Bitantem</td>
<td></td>
</tr>
<tr>
<td>Organic legislations worldwide: Current situation</td>
<td></td>
</tr>
<tr>
<td>International standards &amp; regulations</td>
<td></td>
</tr>
<tr>
<td>The Codex Alimentarius Guidelines: Recent Developments</td>
<td></td>
</tr>
<tr>
<td>EU regulation on organic production</td>
<td></td>
</tr>
<tr>
<td>US National Organic Program (NOP)</td>
<td></td>
</tr>
<tr>
<td>Import requirements of major economies</td>
<td></td>
</tr>
<tr>
<td>Bilateral agreements between the exporting and the target importing country</td>
<td></td>
</tr>
<tr>
<td>Acceptance of the certifying agency by the target importing country</td>
<td></td>
</tr>
<tr>
<td>Facilitating Global Organic Market Access</td>
<td>76</td>
</tr>
<tr>
<td>Sophia Twarog</td>
<td></td>
</tr>
<tr>
<td>World of Organic Certification 2010</td>
<td>78</td>
</tr>
<tr>
<td>Kolbjörn Örjavik</td>
<td></td>
</tr>
<tr>
<td>Government Recognition of Participatory Guarantee Systems in 2010</td>
<td>82</td>
</tr>
<tr>
<td>Joelle Katto-Andrighetto</td>
<td></td>
</tr>
<tr>
<td>The Organic Standard in the Market for Sustainable Products</td>
<td>84</td>
</tr>
<tr>
<td>Oliver von Hagen and Alexander Kasterine</td>
<td></td>
</tr>
<tr>
<td>Environmental, Social, and Economic Impacts of Sustainability Certification in the Agricultural Sector – The Current State of Empirical Research</td>
<td>88</td>
</tr>
<tr>
<td>Julia Jawtusch, Bernadette Oehen, and Urs Niggli</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organic Beekeeping</th>
<th>93</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic Beekeeping: Opportunities and Risks</td>
<td>94</td>
</tr>
<tr>
<td>Salvador Garibay, Peter Gänz, Rémy Vandame, Ulrich Broeker, and Stefan Bogdanov</td>
<td></td>
</tr>
<tr>
<td>European Union</td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
</tr>
<tr>
<td>Other countries in Europe</td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td></td>
</tr>
<tr>
<td>Africa</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td></td>
</tr>
<tr>
<td>Australia / New Zealand</td>
<td></td>
</tr>
<tr>
<td>USA and Canada</td>
<td></td>
</tr>
<tr>
<td>Latin America</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Africa</th>
<th>103</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic Farming in Africa</td>
<td>104</td>
</tr>
<tr>
<td>Hervé Bouagnimbeck</td>
<td></td>
</tr>
<tr>
<td>The extent of organic agriculture in Africa</td>
<td></td>
</tr>
<tr>
<td>Organic wild collection areas and bee pastures</td>
<td></td>
</tr>
<tr>
<td>Markets</td>
<td></td>
</tr>
<tr>
<td>State support</td>
<td></td>
</tr>
<tr>
<td>Standards and legislation</td>
<td></td>
</tr>
<tr>
<td>Research, extension and training</td>
<td></td>
</tr>
<tr>
<td>Background: The Organic Alternative for Africa</td>
<td></td>
</tr>
</tbody>
</table>
# Table of Contents

## Tunisia: Country Report

*Lukas Kilcher and Samia Maamer Belkhiria*

- Production data and operators
- Key institutions/organizations
- Domestic market
- Trade: export, import
- Legislation
- Government support / development cooperation
- Research, advice, and training

## Uganda: Country Report

*Charity Namuwoza and Hedwig Tushemerirwe*

- Organic Certified agricultural land and farmers
- Production
- Key institutions/organizations
- Domestic market
- Growth in organic exports
- Export companies and challenges in international trade
- Standards and certification
- Government support and organic policy
- Research, advice, and training

## ASIA

121

### Organic Asia 2010

*Ong Kung Wai*

- Overview
- Production & Markets
- Standards, certification & regulation
- Development challenges: Collaboration is key

### Organic Agriculture in Armenia

*Nune Darbinyan*

- Recent important developments
- History
- Production data and operators
- Key institutions
- Legislation
- Domestic market
- Export market
- Imports
- Education, extension, and training
- Investment in the organic sector
- Donor support
## Table of Contents

Organic Agriculture Development in China  
Yuhui Qiao  
- Recent important developments  
- History  
- Production  
- Key actors  
- Market & trade  
- Legislation  
- Government and international (development) support  
- Research and Consulting  
- Constraints and Outlook  
- Links/Further reading

Indonesia: Country Report  
Lidy Artesusamty  
- Production  
- Domestic market and exports  
- Policy support  
- Certification  
- Links  
- References

Kazakhstan: Country Report  
Evgeniy Klimov  
- The agricultural sector in Kazakhstan  
- Conditions for the organic sector development  
- Regulatory and legal framework, labeling, and certification  
- Production and export of organic products in Kazakhstan  
- Internal Market  
- Third International Conference on organic sector development in Central/Eastern European and Central Asian countries  
- Links

South Korea: Country Report  
Dong-Geun Choi  
- Government support  
- Production  
- The market  
- Symposia and other Events in 2010  
- Outlook  
- References
<table>
<thead>
<tr>
<th>TABLE OF CONTENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ukraine Country Report</td>
</tr>
<tr>
<td><em>Natalie Prokopchuk and Tobias Eisenring</em></td>
</tr>
<tr>
<td>› Introduction</td>
</tr>
<tr>
<td>› Production Statistics</td>
</tr>
<tr>
<td>› Organic stakeholders in Ukraine</td>
</tr>
<tr>
<td>› Policy dialogue and legal framework</td>
</tr>
<tr>
<td>› Organic certification and standards in Ukraine</td>
</tr>
<tr>
<td>› Domestic market</td>
</tr>
<tr>
<td>› Export</td>
</tr>
<tr>
<td>› Research</td>
</tr>
<tr>
<td>› Education and capacity building</td>
</tr>
<tr>
<td>› Needs of Ukrainian organic sector</td>
</tr>
<tr>
<td>› Conclusion</td>
</tr>
</tbody>
</table>

**MEDITERRANEAN REGION**

Organic Agriculture in the Mediterranean Region: Updates | 177
*Lina Al Bitar, Marie Reine Bteich, Patrizia Pugliese*

› Structural aspects and trends |
› Opportunities and challenges of the new EU import rules: |
   *Highlights from the 5th MOAN annual meeting* |
› Investigating organic research in the Mediterranean: an outline |

**LATIN AMERICA**

Organic Farming in Latin America and the Caribbean | 182
*Salvador V. Garibay, Roberto Ugas, and Patricia Flores Escudero*

› Increase in organic land |
› Organic markets still mainly export oriented |
› Organic guarantee systems |
› Governmental support |
› Education, extension, and research |
› References |

Chile: Country Report | 191
*Pilar Eguillor Recabarren*

› Certification and Labeling |
› Production |
› Producers and other operators |
› Domestic market |
› Export market |
› Policy support |
<table>
<thead>
<tr>
<th>COSTA RICA: COUNTRY REPORT</th>
<th>194</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roberto Azofeifa</td>
<td>194</td>
</tr>
<tr>
<td>› Area and producers</td>
<td></td>
</tr>
<tr>
<td>› Certifying agencies</td>
<td></td>
</tr>
<tr>
<td>› Processors</td>
<td></td>
</tr>
<tr>
<td>› Domestic market</td>
<td></td>
</tr>
<tr>
<td>› Export</td>
<td></td>
</tr>
<tr>
<td>› Legislation and institutional support</td>
<td></td>
</tr>
<tr>
<td>› Government support</td>
<td></td>
</tr>
<tr>
<td>› Outlook</td>
<td></td>
</tr>
<tr>
<td>› Links</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NORTH AMERICA</th>
<th>199</th>
</tr>
</thead>
<tbody>
<tr>
<td>North American Overview</td>
<td>200</td>
</tr>
<tr>
<td><em>Barbara Fitch Haumann</em></td>
<td></td>
</tr>
<tr>
<td>› Key developments</td>
<td></td>
</tr>
<tr>
<td>› Production</td>
<td></td>
</tr>
<tr>
<td>› Organic product sales</td>
<td></td>
</tr>
<tr>
<td>› Advocacy efforts</td>
<td></td>
</tr>
<tr>
<td>› Standards issues</td>
<td></td>
</tr>
<tr>
<td>› Other issues</td>
<td></td>
</tr>
<tr>
<td>› Looking forward</td>
<td></td>
</tr>
<tr>
<td>› Further reading:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UNITED STATES: COUNTRY REPORT</th>
<th>205</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Barbara Fitch Haumann</em></td>
<td></td>
</tr>
<tr>
<td>› Organic market</td>
<td></td>
</tr>
<tr>
<td>› Organic production</td>
<td></td>
</tr>
<tr>
<td>› Consumer trends</td>
<td></td>
</tr>
<tr>
<td>› US labeling win</td>
<td></td>
</tr>
<tr>
<td>› Expanding production and supply</td>
<td></td>
</tr>
<tr>
<td>› Outlook</td>
<td></td>
</tr>
<tr>
<td>› Further reading</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CANADA: COUNTRY REPORT</th>
<th>211</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Matthew Holmes and Anne Macey</em></td>
<td></td>
</tr>
<tr>
<td>› Organic Market</td>
<td></td>
</tr>
<tr>
<td>› Organic production</td>
<td></td>
</tr>
<tr>
<td>› Highlight</td>
<td></td>
</tr>
<tr>
<td>› Research</td>
<td></td>
</tr>
<tr>
<td>› Challenges</td>
<td></td>
</tr>
<tr>
<td>› Outlook</td>
<td></td>
</tr>
<tr>
<td>› References</td>
<td></td>
</tr>
</tbody>
</table>
TABLE OF CONTENTS

OCEANIA 217
Organic Farming in Australia 219
Els Wynen, Alexandra Mitchell, and Paul Kristiansen
› Size of the industry
› Standards and Certification
› Market
› Domestic market
› Policy
› Research and extension
› References

The Pacific Islands 223
Karen Mapusua
› Recent important developments
› History
› Key actors
› Production
› Market & trade
› Domestic markets
› Legislation
› Government and international support
› Outlook
› Links/Further reading

ACHIEVEMENTS MADE AND CHALLENGES AHEAD 229
Creating Power Through Statistical Evidence: The Organic Alternative 230
Markus Arbenz

ANNEX 233
Tables 233
Organic agricultural land, share of total agricultural land and number of producers 234
Organic agricultural land by country 2009, sorted by area 238
Organic agricultural land: The top ten countries per region 2009 240
Share of organic agricultural land by country 2009, sorted by percentage of agricultural land 242
Percentage of organic agricultural land: The top ten countries per region 2009 244
Growth of the organic agricultural land by region 1999-2009 245
Development of the organic agricultural land and share of the agricultural land by region and country, 2007-2009 246
All organic land use types by region and country 2009 252
Organic producers and other operator types by country 2009 257
Land use and key crop groups in organic agriculture worldwide in the regions 2009 262
Data Providers and Data Sources 268
STANDARDS AND REGULATIONS

The Organic Standard in the Market for Sustainable Products

Oliver von Hagen1 and Alexander Kasterine2

The organic sector has grown fast in response to strong consumer concern over food safety and the environment. However, while sales of organically certified products have grown, the sector has had to face new market entrants making green and ethical claims. This is particularly the case when it comes to certified tropical commodities (Potts et al. 2010). This paper outlines the nature of competition to organic from other sustainability labels and initiatives and the strategic responses the sector is making.

The growth in the sustainability market

Despite the economic downturn, the market for products compliant with quality, safety and sustainability standards has continued to grow. This growth applies to both:

- Business to business (B2B) standards that mainly relate to quality or product safety issues (e.g., ISO, GlobalGAP or HACCP) and
- Business to consumer (B2C) standards making sustainability claims (Fairtrade, organic or Rainforest Alliance for example).

Products that comply with business to business standards accounted for 22 percent of global retail food sales in 2010 (GFSI, 2010). Products compliant with business to consumer standards range between 20 percent market share for bananas3 (2009) to 8 percent of exported green coffee4 (2009) and 3 percent of global cocoa sales5 (2009).

The number of business-to-consumer standards has proliferated due to greater consumer demand for products fulfilling sustainability requirements and retailers’ strategy to differentiate their product range according to their brand or choice of sustainability scheme.

Whilst the overall trend is towards competition, there has been some mutual recognition among standards based on benchmarking6 exercises and the establishment of codes of good practice for standard setting (e.g., ISO, ISEAL Alliance).

In the last decade, business to consumer standards have shown yearly double-digit growth rates. This is driven by:

- Multinational corporations who use green and ethical certification and verification as a means to differentiate products and to comply with Corporate Sustainability Reporting requirements (e.g., Unilever, Nestlé or Kraft Foods).

---

1 Oliver von Hagen, International Trade Centre (ITC), Geneva, Switzerland, www.standardsmap.org/
2 Dr. Alexander Kasterine, International Trade Centre (ITC), Geneva, Switzerland, www.intracen.org/organics
3 The State of Sustainability Initiatives Review 2010: Sustainability and Transparency (SSI Report). This number is based on export data.
6 Benchmarking is a process whereby standard setting organizations evaluate various aspects of their standard in relation to another standard. This allows comparisons between the respective standards and provides the basis for the recognition of the benchmarked standard as equivalent standard.
- Increasing consumer demand for assurance of green production processes and food safety.

**Challenges to the organic standard and responses**

Organic is distinct from other sustainability standards in two respects. Firstly, as described by the Codex Alimentarius, it is a “holistic production management system” and is unrestricted in product scope; the system is practiced and promoted by private and public organizations in over 160 countries of the world. Secondly, it is the only standard that is defined by public regulations, such as in the EU and US. However, despite this, organic standards compete for market shares with other sustainability standards such as Rainforest Alliance, UTZ Certified or Fairtrade. This mainly results from the undifferentiated perception of these standards by the majority of consumers.

**Competing claims for environmental sustainability**

Organic has long been the market leader in sustainability standards, but this position is under threat particularly in tropical commodities. Despite continuous growth of the market of organic products in absolute terms, new market entrants show stronger growth and compete with organic labels (Pierrot et al. 2011). Organic has taken a non-confrontational approach with competing green standards, perhaps confident of holding the position of delivering strong environmental benefits.

Threats from green claims extend beyond competing standards to corporations some of whom are accused of greenwashing¹ in their marketing and communication. Greenwashing is damaging to organic in so much as it undermines consumer confidence in sustainability products in general.

**Multiple sustainability issues**

“Sustainable” consumerism no longer encompasses just organic. Consumers demand evidence of sustainable practices beyond what organic can offer, including “ethical” labor practices, the exclusion of child labor, buying local products, reduced carbon emissions, conservation of flora and fauna, and so on.

A key response of private organic standard setters has been to integrate other sustainability criteria which do not relate directly to organic production, for example stricter rules on animal welfare than provided by the EU regulation and setting ceilings on carbon emissions from transport.

Alliances between brands have formed, which may eventually have negative implications for the organic standard and its ability to withstand competition. For example, the Rainforest Alliance standard for coffee has been benchmarked against the Common Code for the Coffee Community (4C) Association standard, making Rainforest Alliance certification of coffee equivalent to 4C Association certification and thus easier for producers to attain double certification.

The organic sector has also accepted double and triple certification with complementary schemes. In cocoa, 15 percent of organic and Fairtrade certified produce is double or triple

¹ For a definition see Greenpeace’s [www.stopgreenwash.org](http://www.stopgreenwash.org) for example.
certified.\textsuperscript{1} In coffee, 50 percent of Fairtrade certified produce is also organic certified.\textsuperscript{2} In coffee, organic has also double certified with Rainforest Alliance. The UK high end retailer Marks and Spencer, has announced it will sell only triple certified coffee (Fairtrade, organic, and Rainforest Alliance).

**Premium labels**

Manufacturers and retailers have developed premium labels to convey sustainability and food safety qualities to the consumer instead of using the organic standard. This is observed in the coffee sector with the coffee brand Nespresso\textsuperscript{3} who promote sustainability through other means than the use of the organic label.

Whilst the term “organic” is protected by law, similar claims like “natural” act as competition. For example, market research in the US from Shelton\textsuperscript{4} shows that many consumers misunderstand the terms “natural” and “organic,” and believe that natural is the more regulated term. Their focus groups also revealed that lower-middle income groups found the term organic “elitist” and a way simply “to extract more money” from the consumer.

**Local claims**

“Local” food is widely promoted by retailers, celebrity chefs, and politicians for its diversity, freshness and low “food miles”. Locally produced products appear to be an alternative for consumers who would otherwise buy organic. Some organic labels give clear preference to local food and ban air transport, ostensibly to reduce carbon emissions (e.g., Bio Suisse).

**Conclusion**

The organic sector faces the challenge of an increasing number of other standards and brands competing for green and ethical segment of the consumer market. Sustainability as a term has broadened and corporations are introducing sustainability objectives across the whole value chain. The organic sector is heterogeneous and private standard setters have responded differently. Some like KRAV and the Soil Association include broader sustainability objectives than just organic, whilst the majority of standards remains focused on organic production and processes.

Whilst the market grows, it appears the organic sector is unconcerned about competing standard setters and brands making claims on sustainability. This position is strengthened by the protection that the EU, US, and other countries’ regulations provide to the organic name and thus supports consumer confidence. The sector perceives larger threats to its growth from policies that favor GMOs and the agrochemical industry.

---

\textsuperscript{1} Tropical Commodity Coalition, Cocoa Barometer 2010.

\textsuperscript{2} Tropical Commodity Coalition, Coffee Barometer 2009.

\textsuperscript{3} The Nespresso Sustainable Quality was developed by Nespresso in collaboration with the Rainforest Alliance in 2005, this collaboration looks to serve the growing demand for sustainability standards across the specialty coffee sector (Potts et al., 2010).

### Table 17: Challenges for organic production from other standards and brands

<table>
<thead>
<tr>
<th>Challenges for organic</th>
<th>Examples</th>
<th>Risks to organic</th>
<th>Response of organic sector</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competing green claims</strong></td>
<td>Rainforest Alliance, UTZ Certified</td>
<td>Losing market share, particularly in tropical commodities</td>
<td>Passive; accepting multiple certification</td>
</tr>
<tr>
<td><strong>Corporate green-washing</strong></td>
<td>Regarding beef/soya and associated deforestation</td>
<td>Damage to growth due to lost credibility of green claims</td>
<td>Advocate sustainability of organic production systems</td>
</tr>
<tr>
<td><strong>Multiple sustainability issues</strong></td>
<td>Fair labor practices</td>
<td>Higher risk in produce from developing countries</td>
<td>Double/triple certification with complementary standards (Fairtrade)</td>
</tr>
<tr>
<td></td>
<td>Carbon emissions</td>
<td>Increasing risk, but an opportunity</td>
<td>Inclusion of criteria on transport (KRAV); risks of damage to trade; Advocate climate benefits of organic in general</td>
</tr>
<tr>
<td><strong>Premium labels</strong></td>
<td>Animal welfare</td>
<td>Low</td>
<td>Inclusion of criteria on welfare (Soil Association)</td>
</tr>
<tr>
<td><strong>Local production claims</strong></td>
<td>Nespresso</td>
<td>Risk of losing market share given corporate power behind claims</td>
<td>Passive; Advocate benefits of organic</td>
</tr>
<tr>
<td></td>
<td>Local food movement in US and EU</td>
<td>Restricts trade and market growth</td>
<td>Embrace localism in Europe and US. (Rejection by developing country exporters.)</td>
</tr>
</tbody>
</table>

Source: Authors' elaboration

### References

- Tropical Commodity Coalition, Cocoa Barometer 2010. Available at: www.teacoffeecocoa.org
- Tropical Commodity Coalition, Coffee Barometer 2009. Available at: www.teacoffeecocoa.org

### Acknowledgements

The authors would like to thank Julia Jawusch, Lukas Kilcher and Helga Willer (all FiBL) and Markus Arbenz, Executive Director of IFOAM, for sharing their perspectives on this subject.