

into  **THE**
FUTURE

CONSOLIDATED ANNUAL REPORT OF
IFOAM - ORGANICS INTERNATIONAL

2015

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PRESIDENT'S MESSAGE



It gives me great pleasure to present another great report about IFOAM - Organics International and the organic sector. We are the truly wonderful good news story in a world suffering from numerous social, environmental and economic problems.

This report shows how the staff and World Board have been working hard to fulfill our mission of leading, uniting and assisting the organic movement in its full diversity.

Organic 3.0 is resonating around the world. People on every continent are engaged in our process of developing our new collective vision for the organic movement. This will be signed off by all of us at our General Assembly in India in 2017.

2015 was the International Year of the Soils. We have been actively involved in promoting the importance of healthy soils, especially by increasing the levels of soil organic matter.

2015 was also the year of the most important international climate change meeting in the history of our planet. IFOAM - Organics International actively participated in this meeting in Paris. We have been involved in every meeting since Copenhagen in 2009.

One of the significant events in Paris was the launching of the '4 per 1000' initiative by the French Government. Just adopting renewable energy and stopping emission will not stop climate change. The current emissions will remain in the atmosphere for hundreds of years and will

cause climate change to intensify further. We need to take these greenhouse gases out of the atmosphere.

The best analogy is: If a boat is sinking we have to do more than just plug the leak – we have to bail out the water. We can 'bail out' the CO² by using plants to capture it and then recycle it as organic matter in the soil. Published science shows that scaling up good practice organic systems will assist in increasing soil carbon and reversing climate change.

The French Government's soil scientists have established that an annual growth rate of 4 parts per thousand of the agricultural soil carbon stocks would make it possible to stop the present increase in atmospheric CO².

The UNFCCC recognizes this initiative by the French Government as part of the Lima – Paris accord. Over 30 countries, several regions, FAO, IFAD, GEF, CGIAR and numerous NGOs have signed on. IFOAM - Organics International is one of the founding signatories of this important initiative.

Andre Leu

A handwritten signature in black ink, appearing to be 'AL' or similar initials, written in a cursive style.

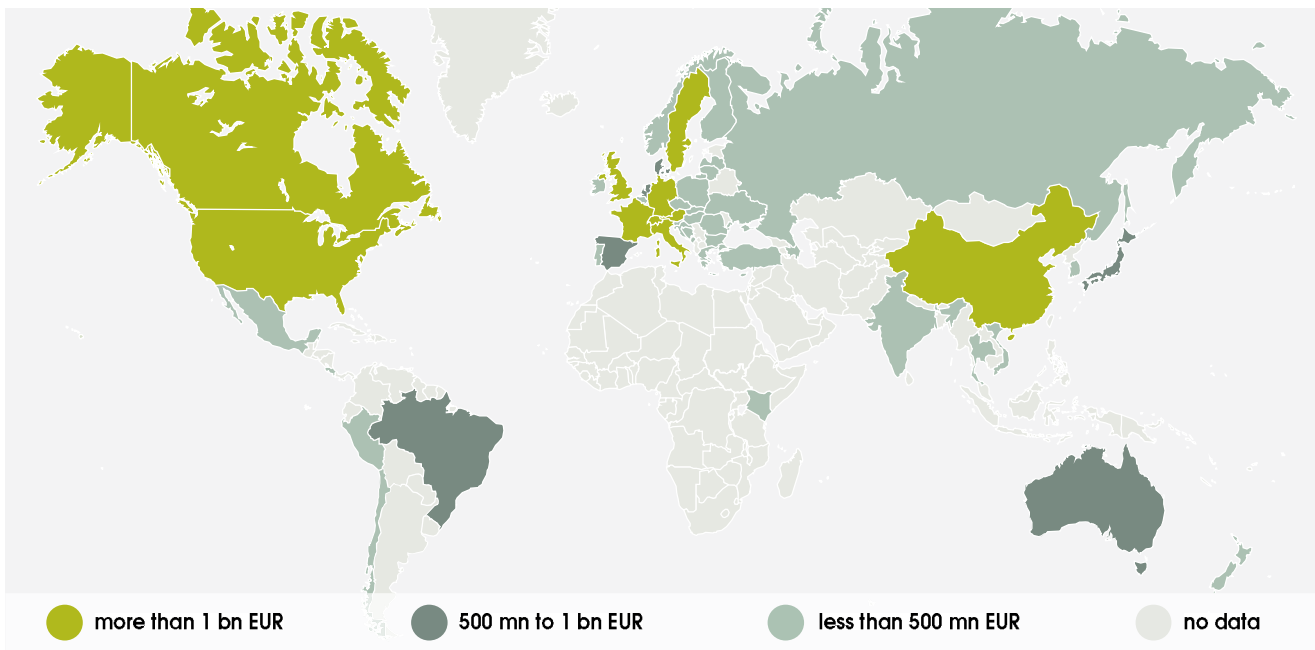
PRESIDENT of IFOAM - Organics International

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THE ORGANIC WORLD IN 2015

at a Glance

MAP OF ORGANIC AGRICULTURE: RETAIL SALES BY COUNTRY



INDICATOR	GLOBAL TOTALS	LEADING COUNTRIES
Countries with data on certified organic agriculture	2014: 172 Countries	New countries: Kiribati, Puerto Rico, Suriname, United States Virgin Islands
Organic agricultural land	2014: 43.7 mn ha (1999: 11 mn ha)	Australia (17.2 mn ha), Argentina (3.1 mn ha), US (2.2 mn. ha, 2011)
Organic share of total agricultural land	2014: 0.99%	Falkland Islands (Malvinas) (36.3%), Liechtenstein (30.9%), Austria (19.4%)
Wild collection and further, non-agricultural areas	2014: 36.7 mn ha (1999: 4.1 mn ha)	Finland (9.1 mn ha), Zambia (6.8 mn ha), India (4 mn ha)
Producers	2014: 2.3 mn producers (1999: 200,000 producers)	India (650,000), Uganda (190,552), Mexico (169,703)
Organic market size	2014: 80 bn USD (1999: 15.2 bn USD)	US (35.9 bn USD; 27.1 bn EUR), Germany (10.5 bn USD; 7.9 bn EUR), France (6.8 bn USD; 4.8 bn EUR)
Per capita consumption	2014: 11 USD (8.3 EUR) (1999: 2.5 USD)	Switzerland (221 EUR), Luxemburg (164 EUR), Denmark (162 EUR)
Number of countries with organic regulations	2014: 87 countries	
Affiliates of IFOAM - Organics International	2015: 784 affiliates from 117 countries	Germany: 91 affiliates, China: 57 affiliates, India: 44 affiliates, USA: 40 affiliates

Source: IFOAM survey 2016, based on the national data sources and data from certifiers. Global market: Organic Monitor 2016

*Note: Statistical data as of December 2014.

19th ORGANIC WORLD CONGRESS & General Assembly



1998



2000



2002



2005



2008



2011



2014



2017



Join us at the
19th ORGANIC WORLD CONGRESS
जैविक कृषि विश्व कुंभ

9 - 11 November 2017 | New Delhi, India



A series of public discussions and debates by leaders from the organic movement on how we can best promote and implement the organic agenda. The overarching theme is 'Global Adoption of Organic Principles for Truly Sustainable Agriculture.'



A forum to highlight farmers' work in organic, especially regarding innovations used on their farms. Presentations will be on **Seeds & Biodiversity, Soil Fertility & Health, Soil Life & Plant Health, and Ecological Farming Practices & Systems.**



A platform where research results are presented and discussed in 20 sessions. Papers must link to scientific disciplines such as **soil, plant, animal, or economics.**



Discussions of **innovative ideas for shortening value chains, for systems that build trust between actors, for promising marketing methods and for organic and fair trade alliance building.** Papers will deal with **emerging trends in quality assurance and fair trade.**

For more information, visit: www.owc.ifoam.bio | Paper Submission Deadline: **November 30th, 2016**

4 OUR ACTIVITIES



FROM MILANO TO GOESAN, HEADING TOWARDS OUR FUTURE

Small and larger-scale think-tanking marked much of 2015 with a focus on how we can shape the future of organic.

Ideas that took shape at the General Assembly in Turkey were taken into think spaces to define further action. This included the development of new positions as mandated by the membership – e.g. cooperation potential with like-minded organizations and movements, like Fair Trade, - as well as a focus on strategic development, especially in terms of communication, finances, impact building and adding substance to the now widely discussed concept of Organic 3.0.

Consequently, the many and diverse events with our involvement were full of new and sometimes surprising content. Events ranged from more intimate gatherings like the SOAAN think tank in Bonn or the OFIA Summit in Korea, to larger events like 'Celebrating Soil' in Amsterdam, the 'African Organic Conference' in Lagos, or the Organic Expo in Goesan (with 1.1 million visitors, the biggest organic event ever). BIOFACH continues

its role as the global platform for the organic industry, fomenting debate and contributing to giving organics increased visibility. Organics was further brought into mainstream discussions at events like the 'Organic Week' at Expo Milano 2015 or the COP21 Climate Conference in Paris.

The formal approval of a communications strategy in 2015 and its translation into action resulted in a more marked presence on selected social media. And content expertise led to an extraordinary demand for our advice by countries to support their sector development.

Successes in advocacy include references to organics by UN Secretary Bang Ki Moon, the approved Sustainable Development Goals (SDG) that finally acknowledges sustainability of agriculture in SDG 2, the International Year of Soils yielding recognition of organic soil management and the revelation of Pope Francis' endorsement of a green agenda.

2015 saw several new large projects moving towards implementation, all of them in cooperation with local partners: In East Africa there is a focus on organic market development with the support of the Swedish government; In mountain agro-ecosystems we empower rural service providers to achieve improved nutrition with support from the Swiss government; And food insecure areas of North Korea benefit from access to organic knowledge with the support from the European Union.



Regional Conference on Marketing & Innovation in Organic Farming, S. Korea

THE ORGANIC UMBRELLA



- 784 affiliates from 117 countries;
- Publication of 7 videos;
- 12,647 active .bio domain names, a +80% growth versus 2014.

International events offer an opportunity to exchange, think tank and jointly shape the future of organics.

2015 is marked by a number of events that bring to the fore topics of momentous importance and gather great thinkers from our movement - and beyond.

'The Organic Week', integrated into the broader program of Expo Milano 2015, literally brings organics into the mainstream: Over three days, 18 prominent speakers discuss the importance of soils, how to feed the planet sustainably and address, under the banner of Organic 3.0, the importance of re-assessing the premises that currently rule the organic sector.

The 'Marketing & Innovation Conference', together with the 'Organic Farming Innovation Award', is held in Goesan, South Korea, and takes a look at strategies

adopted by organic farming entrepreneurs and marketers to ensure long-term competitiveness. Farming strategies, direct marketing solutions, extension and education, and systems innovations are the thematic foci addressed by the 28 speakers from 20 countries.

The three-day conference on Organic 3.0, also held in Goesan, South Korea, casts a look into the future and continues the dialogue on the next phase of organic development. It is reflected on in more detail in the 'Our Impacts' section of this Annual Report.

Last but not least, an increased emphasis continues to be placed on digital communication with the launch of seven videos with themes ranging from GMO discussions, our participation at the COP21 climate change negotiations, reasons to go organic, to an introduction of some of our members to celebrating organic farmers as our everyday heroes.



Markus Arbenz, Executive Director, at EXPO MILANO 2015

ORGANIC ADVOCACY



- Sustainable agriculture is adopted as a Sustainable Development Goal;
- The UN Secretary General's Report on Agricultural Technology acknowledges that organic agriculture can significantly increase and stabilize yields in developing countries;
- IFOAM - Organics International is a member of the International Steering Committee for the International Year of Soils (IYS) 2015.

2015 was key for the future of humanity: Countries adopt a new sustainable development agenda for the next 15 years and a global agreement on climate change.

The year 2015 sees us become co-leader of the Farmers' Major Group in UN processes on sustainable development and also be elected by civil society organizations to be a member of the Multistakeholder Advisory Committee for the UNEP 10-year Framework Programme on Sustainable Consumption and Production.

We take a firm stand for smallholders worldwide in the G7 dialogue with civil society and take a delegation of organic farmers to speak out for organic agriculture at the COP21 climate negotiations. On the sidelines of COP21, we sign the '4 pour 1000' Initiative which recognizes the carbon sequestration potential of soils to battle climate change and the contribution of

organic farming methods to capturing carbon in the soil. Other signatories include ministers from Australia, Germany and France.

At the Global Soil Week in Berlin, we highlight cases in which local communities benefit from sustainable soil management practices and explain why the actions of the agro-food industry are massive violations of Nature's Rights at the Rights of Nature Tribunal in Paris. We address organic agriculture and the role of traceability as a model for connecting to consumers at the IFAD AgTalks.

The Global Goals for Sustainable Development are agreed on. By 2030 they aim to end poverty, combat climate change as well as fight injustice and inequality. We highlight how investing in organic agriculture can address goals on hunger and malnutrition, poverty, water use, climate change, and unsustainable production and consumption.

Last but by no means least, Andre Leu's book on the Myths of Safe Pesticides becomes a number 1 bestseller in its category on Amazon. It is presented to FAO staff in Rome and we promote organic agriculture as a pesticide-free solution for food security, health and environment protection at the Science Fair of the UNEP triple COPs.



The organic farming delegation of IFOAM - Organics International at COP21



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

ORGANIC VALUE CHAIN



- Organic Regulation Toolkit published;
- 234 PGS initiatives worldwide;
- PGS training video produced;
- Organic 3.0 booklet published;
- Regulatory advice given to 8 countries



Organic produce section in supermarket (Brazil)



PGS - Giyani, South Africa

Expertise on organic policies and guarantee systems serves members, governments and the broader organic sector.

The Organic Guarantee System (OGS) of IFOAM – Organics International serves as the global reference for organic integrity, with organic standards being assessed and improved as part of the IFOAM Family of Standards and certification bodies demonstrating best certification practices through the IFOAM Accreditation Program. We also foster fraud prevention through the BloC certification database.

Several technical issues raised through membership motions are worked on, including new plant breeding techniques, varieties derived from cell fusion, and closing nutrient cycles. We further the development of Organic 3.0, continue lobbying for improvements of existing regulations, whilst assisting governments in developing new ones, using our newly launched Organic Regulation Toolkit.

In 2015, we start looking beyond regulation to policies that support organic. We initiate a global study to collect information on such policies and plan to develop a new Organic Policy Toolkit in 2016.

Participatory Guarantee Systems (PGS) projects, funded by FAO and the Asian Development Bank, are under implementation in Asia and, in that context, we produce the first global PGS training video. Development of PGS is supported worldwide, with specific projects under implementation in the Greater Mekong Sub-region. A global PGS survey reveals significant increase in the number of PGS initiatives and of beneficiaries.

ORGANIC ACADEMY



- ❑ 170 Organic Leadership Course (OLC) alumni from over 25 countries;
- ❑ OLC Southeast Asia concludes successfully in Thailand;
- ❑ OLC Europe launches 3rd consecutive program;
- ❑ OLC comes to Africa.

The Organic Academy continues to focus on its flagship program, the Organic Leadership Course (OLC), but increases its scope for cross-pillar support in capacity development programs in the organization.

The OLC celebrates its 4th year by concluding the second edition of the OLC Europe in Nuremberg and kicking off the third OLC Europe in the Netherlands with 20 participants. In addition, the OLC Southeast Asia group graduates in Thailand after sharing their individual development plans with their peers and other stakeholders in the Thai sector.

Increasingly, OLC alumni take on leadership positions in the sector, from contributing at conferences, leading institutional development and innovation, supporting local food systems and grassroots movements and by achieving recognition at academic level.

The Academy is proud to launch its first OLC program in Africa, as 22 applicants from across the continent, are selected for the program to kick off in Tanzania. The Africa OLC, part of the Sida supported OTEA project, will play a key role in supporting the institutional development of countries like Sudan, Burundi, Rwanda, Zimbabwe and South Africa while strengthening the movements already active in countries like Tanzania, Uganda and Kenya.

A further development in the Academy is its ability to support capacity development programs in major projects like NMA and OTEA, by developing customized curricula and implementing training programs based on the successful model of the OLC.

The Organic Agriculture Academy for Extension Agents enters its second phase in South Korea by training a third group of extension officers in organic conversion and extension support. The lessons learnt in this program are supporting the development of the curriculum for rural service providers' training to take place in five countries, on three continents and in three languages as part of the NMA project.



ORGANIC PROGRAMS



- 14 projects running in 24 countries;
- Growth of programs;
- increased project support for African movement

In 2015, we see a shift from 'organic for the sake of organic' towards using organic solutions to sustain communities.

The SDC-supported Nutrition in Mountain Agro-ecosystems (NMA) project leads the way in extending organic and agro-ecological solutions to a widening base of rural service providers, while Organic Trade in

East Africa (OEA) project is not just developing value chain support, but also assisting African stakeholders to develop capacity while implementing locally relevant solutions for trade and policy.

Working on four continents on behalf of eight donors, IFOAM – Organics International shows an increasing capacity to implement big-ticket projects. Our strength remains the ability to network and empower stakeholders across the value chain, but the focus starts to echo the development towards new food and farming systems, in the spirit of the movement's vision towards Organic 3.0.

Two projects, supported by the EU Commission, running back-to-back in the Democratic People's Republic of Korea, speak for our ability to deliver under challenging circumstances. Our expertise in converting theoretical concepts into practical solutions helps us support not only the traditional production-for-trade in developing economies, but also supporting rural service provision (NMA in five countries and OAAEA in South Korea), institutional development in Rwanda and Burundi (OEA), advocacy and policy support for the African Continent (Pro Eco Organic Africa and OEA), cleaner production systems for bamboo shoot growers and processors (INBAR) and grassroots farmer support (IFAD-INOFO).

We continue to play an important supporting role in projects like Bioguard to support research and development of biological solutions to pest and disease in the Mediterranean production sphere.

The biggest impact of our projects remains the empowerment and development of global networks to assist and lead the movement.



Nutrition in Mountain Agro-ecosystems Project (Peru)

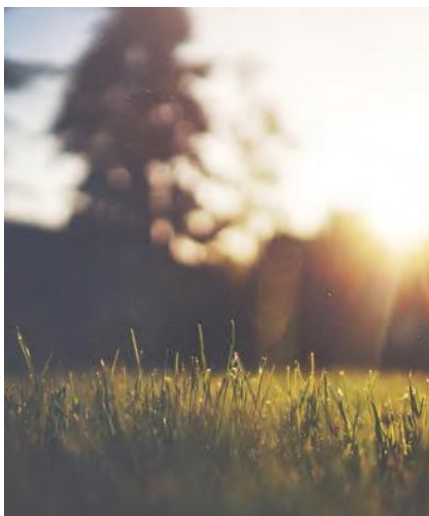
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ACTION GROUP of IFOAM - ORGANICS INTERNATIONAL

SECTOR PLATFORMS



- China Amenity Agriculture Alliance was set up, Mr. Liu Qingdong selected as Chairman;
- IAA received approval to set up an office in mainland China in July 2015;
- A new 1.000 m2 office will open in April 2016;
- A BIOMASS fund was set up in mainland China and China HK to help poor farmers.



IAHA is an informal network of individuals and organizations interested in inspiring, supporting and strengthening the development of organic animal husbandry. Main activities after the IFOAM Organic World Congress and in 2015 were:

- The publication of the proceedings and workshop results of the IAHA-Preconference and main session at 18th Organic World Congress on the IAHA website;
- Dissemination of the Istanbul Declaration of IFOAM Animal Husbandry Alliance from October 2015;
- An IAHA newsletter on organic animal husbandry in Turkey and the Middle East, published in March 2015;
- Discussion of concepts for organic animal husbandry as contribution to the Organic 3.0 discussion process.



- IFOAM Apiculture Forum (IAF) established;
- Joint initiative by Naturland, Demeter (Germany), FiBL (Switzerland), Coopsol (Argentina), ECOSUR (Mexico) and the consultancy Apicon;
- The main aim of IAF is to advance the development of organic beekeeping and to encourage traditional practices;
- IAF focuses on the contribution that organic beekeeping makes to rural areas;
- The first major task for the forum is the organization of the World Conference on Organic Beekeeping;
- World Conference to be held between 6-10 September, 2016, Argentina.





- IFOAM EU Organic Aquaculture Expert Group meets to discuss regulatory issues;
- Expert Group drafts position paper on non-organic juveniles and submits it to the EU Commission;
- Development of webpage, informing of its aims and objectives and defining of organic aquaculture;
- Finalization of Rules of Procedure.



- Seeds Platform created as a Self-organized Structure in June 2015;
- Several outputs presented to the public;
- Recruitment of new members in order to set its future work agenda.



IFOAM Seeds Platform - Group Meeting in Peru



- The European Organic Farmers' Group meets four times throughout the year;
- One of INOFO's convenors for Europe, invited by the governor of Hunan Province, attends an agricultural conference in China;
- Participation of an INOFO delegation of organic farmers' organizations at the Climate Summit in Paris, with IFAD funding participation of farmers from the global South;
- Preparations for OWC 2017 India have begun, i.e. the recruiting of organic farmers from all continents to make presentations about their agricultural activities at the congress;
- The following convenorships are now operational: Latin America & Caribbean, Africa (West, East, Southern), Europe, & Asia (South, South-East).



- The 3rd Science Day at BIOFACH 2015 in Nuremberg, Germany;
- Summary of the discussion on the 1st Draft of the Research Vision of TIPI published;
- Summary of the survey on research needs presented at Science Day;
- Launch of TIPI Twitter account (www.twitter.com/tipifoam);
- Preparation of the final version of the TIPI Global Vision and Strategy for Organic Farming Re-research;
- TIPI Council meetings.



TIPI - Science Day 2015

