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The EU-U.S. Organic Equivalence Cooperation Arrangement

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Organic Products

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Report Highlights:

On February 15, 2012, the European Union and the United States announced that beginning June 1st, 2012 their respective countries' certified organic products will be recognized. This, in combination with the growing demand in the EU is expected to open new opportunities for U.S. exporters.

General Information:

Disclaimer: This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

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Summary

On February 15, 2012, the European Union and the United States announced an important new arrangement to expanded market access, reduce duplicative requirements, and lower certification costs for the trade in organic products. This report provides information on the organic market in the EU and opportunities for U.S. products in light of the new arrangement. Growing demand in the EU, supported by the arrangement, is creating new export opportunities for U.S. companies in the following market segments: tree nuts, fresh fruit, specialty grains, dried fruit, vegetables and processed food products.

USDA/FAS estimates the EU demand for organic food and drink products in 2010 at 24.5 billion USD an increase of 7.8 percent compared to the previous year.

The EU-U.S. Organic Equivalence Cooperation Arrangement and implications for the trade

Coordinated by Karin Bendz/USEU FAS Brussels and Kelly Strzelecki/FAS Washington

On February 15, 2012, the European Union and the United States announced that beginning June 1st, 2012 their respective countries' certified organic products will be recognized. Formal letters creating "the Arrangement", or "the Partnership", were signed at the BioFach World Organic Fair in Nuremberg, Germany, by Dacian Cioloş, European Commissioner for Agriculture and Rural Development; Kathleen Merrigan, U.S. Deputy Secretary of Agriculture; and Isi Siddiqui, U.S. Trade Representative Chief Agricultural Negotiator.

This Partnership focuses on the importance of products produced using organic methods in both markets. Although there have been no actual problems in trade of organic products between the U.S. and the EU, the Partnership will decrease the burden of administration and is expected to open new possibilities for trade. Previously, operations that wanted to trade organic products on both sides of the Atlantic had to obtain separate certifications to both standards, which meant a second set of fees, inspections, and paperwork. Additionally, in most cases, the Partnership will provide exporters the opportunity to serve both the U.S. and EU markets from a single inventory of organic products.

To prepare for the Partnership, both parties conducted thorough on-site audits to ensure that their programs' regulations, quality control measures, certification requirements, and labeling practices were compatible. The United States and the European Union will continue to have regular discussions and will review each other's programs periodically to affirm that the terms of the Partnership are being met.

Under the Partnership, the EU will recognize the USDA National Organic Program (NOP) as equivalent to the EU Organic Program (under applicable EU regulations) and will allow U.S. organic products to be marketed as "organic" in the EU using the EU organic logo, and vice versa, under the following two conditions:

- Tetracycline and streptomycin were not used to control fire blight in apples and pears (for U.S. exports to the EU); and
- Antibiotics were not administered to animals (for EU exports to the U.S.)

The Partnership is limited to organic products, certified under the NOP program, of U.S. origin, either produced within the U.S. or where the final processing or packaging occurs within the U.S. A list of the USDA accredited certifying agents can be found on the following website:

<http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateJ&navID=NationalOrganicProgram&leftNav=NationalOrganicProgram&page=NOPACAs&description=USDA%20Accredited%20Certifying%20Agents&acct=nopgeninfo>

In addition to these restrictions, all products traded under the Partnership must be accompanied by an organic export certificate. This document will state the production location, identify the organization that certified the organic product, verify that prohibited substances and methods were not used, certify that the terms of the Partnership were met, and allow traded products to be tracked.

In three years, the Parties will review the operation of the Partnership to determine whether the export certification requirement should be eliminated, resulting in a full and complete recognition of the equivalence of each other's organic programs.

Under the Partnership, the EU and the U.S. also agreed to begin work on a series of technical cooperation initiatives to promote organic production and to establish common practices for the assessment and recognition of the organics programs of third countries. The Parties agreed to exchange information on animal welfare, including living conditions and organic livestock health care concerns, antibiotic-free dairy and other animal production issues, monitoring conversion practices and parallel production, and control and approval processes in third countries. The Parties will also exchange information on methods to avoid adventitious presence of genetically engineered plants and work together on future activities to enhance the integrity of organic production systems.

Further details, including the letters exchanged in the Partnership and certificate information can be found on the USDA, National Organic Program website:

<http://www.ams.usda.gov/NOPTTradeEuropeanUnion>.

Regulations and Policy

The legislation for organic production in the EU is similar to the U.S. system, yet there are differences. The EU the organic legislation covers only food and feed products. Currently, products for personal care are not covered. With growing interest for organic products, pressure to find new markets, and the new EU wide organics legislation on organic products, there are increasing possibilities for a growing trade. An overview of the new trade opportunities are detailed in Table 1 of the report.

Organic Wine

Until now there has been no EU legislation on organic wine. The only wine available has been “wine made from organic grapes”. On February 8, 2012 the Standing Committee on Organic Farming (SCOF) agreed on EU rules for organic wine. These rules will be published in the Official Journal (OJ) in the coming weeks and will apply from the 2012 harvest. The most complicated issue in drafting this legislation was sulfite reduction. In the new rule the maximum sulfite content is set at 100 mg per liter for red wine (150 mg/l for conventional) and 150mg/l for white/rosé (200 mg/l for conventional), with a 30mg/l differential where the residual sugar content is more than 2g per liter.

Certification for exports of U.S. organic products to the EU

There are currently three different ways to export organic products to the EU:

First is the option of being on the EU list of third countries with full recognition of that country’s organic production system. With the Partnership the U.S. is added to this list. The list of countries and the relevant specifications can be found in Annex III of the regulation of imports of organic products from third countries ([1235/2008](#)). The countries currently on the list are: Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Switzerland, Tunisia, and as of February 15, 2012, United States.

Second is the option of an exporter having an agreement with a specific Member State. This system, where a Member State can certify and import an organic product has been in use since 1994. This option is being phased out under the new legislation, and will no longer be eligible after July 1, 2013.

Third for countries that are not on the third country list, the option of exporting organic products to the EU is by having the product certified by a certifier that is recognized by the European Commission. Products certified this way are allowed to be sold as organic in all EU Member States.

On December 6, 2011, the European Commission published the implementing regulation [1267/2011](#) laying down detailed rules for the Partnership for imports of organic products from third countries, including the long awaited list of certification bodies. The U.S. certification bodies are:

- Washington State Department of Agriculture
- Organic crop improvement association
- Oregon Tilth
- Quality Assurance International
- International Certification Services, Inc.
- Organic Certifiers
- California Certified Organic Farmers

According to EU Commission officials the list is not comprehensive. Some organizations are not on the list simply because they failed to submit their information on time. The Commission intends to update the list before July 2012, and will include the rest of the approved U.S. certifying agents.

After June 1, 2012, the United States will be on the EU’s list of third countries. Therefore all products certified by the USDA (NOP), and exported from the United States, can be sold in the EU as certified organic products. U.S certifiers will no longer need to be on the EU list of certifying agents, unless if they operate in a third country.

Differences

The U.S. and the EU requirements for organic products are similar in many ways although marketers of U.S. products should keep in mind that there are a few areas where there are differences:

Program oversight: In the EU, enforcement, compliance and oversight responsibilities are delegated to the authorities in each of the Member States. Member States are permitted to approve private certification and set up government authorities to oversee the organic operations within the respective Member State. In the U.S., it is the USDA's National Organic Program (NOP) that has strict enforcement and reporting requirements and conducts regular audits and oversight of all domestic and international certification bodies and authorities.

Approach: In the EU, the legislation is based on lists of allowable production methods for organic products while in the U.S., the legislation lists methods that are not allowed.

Antibiotics: In the EU, it is required to give antibiotics to a sick animal, up to three times during a 12-month period. In the United States an animal that has received an antibiotic treatment can no longer be considered organic.

Organic content: In both the United States and the EU a product must contain at least 95 percent organically produced products to be labeled as organic. In the U.S. a product that contains 70-95 percent may be labeled as "made with organic". This is not an option in the EU.

Labeling

On July 1, 2010, the use of the EU organic logo became mandatory for prepackaged organic food produced in the EU. It may be accompanied by national or private logos. For any organic products (pre-packaged and non pre-packaged) imported from third countries, the use of the EU logo is optional, [Commission Regulation 889/2008](#). However, when the EU logo appears on the label, the indication of the place where the products were farmed is required. The regulation lays down detailed rules for the implementation of Regulation 834/2007 with regard to production. A sample of the logo is published in Annex XI-A of Regulation 889/2008. Annex XI-B sets out the format for the code number of the control body or authority. This code number together with an indication of the place of farming of the agricultural raw materials must be placed below the EU organic logo. More information on organic food labeling is available in [GAIN report E48106](#).

The EU-27 Organic Agricultural Production and Market

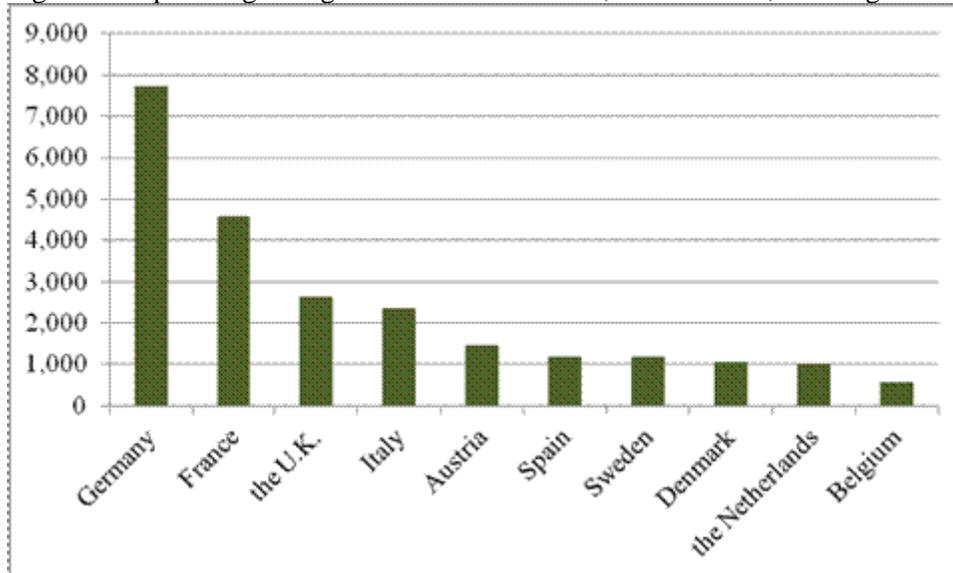
Coordinated by Marcel Pinckaers/FAS The Hague

Over the past decade, the organic agricultural land in the EU-27 more than doubled. The organic area grew especially in the new Member States. The largest areas are in Spain, Italy and Germany. These three alone have 40 percent of the EU organic area. FiBL data shows that in 2010, almost 9.0 million hectares were under organic agricultural management or slightly over 5 percent of the total EU-27 agricultural land. This percentage differs however considerably between Member States. Austria, Sweden and Estonia, with respectively 20, 14 and 13 percent, rank among the highest while Bulgaria, Ireland and Romania (at 1 percent) have the lowest percentage of agricultural land under organic production.

FiBL data also shows that almost half of this organic land, or 4.0 million hectares, is used for permanent grassland. Spain (760,000 hectares), Germany (514,000 hectares), the U.K. (496,000), Austria (342,000 hectares) and Czech Republic (329,000 hectares) have the largest organic permanent grassland. Slightly over 38% of the organic area, or 3.2 million hectares, is used for arable crops (led by cereal production) and the largest areas are to be found in Italy (487,000 hectares), Germany (415,000 hectares) and France (332,000 hectares). Another 10 percent, or roughly 850 thousand hectares, is being used to grow permanent crops of which two-third is in Italy and Spain. Most of this land is used for the production of

olives, grapes or nuts.^[1]

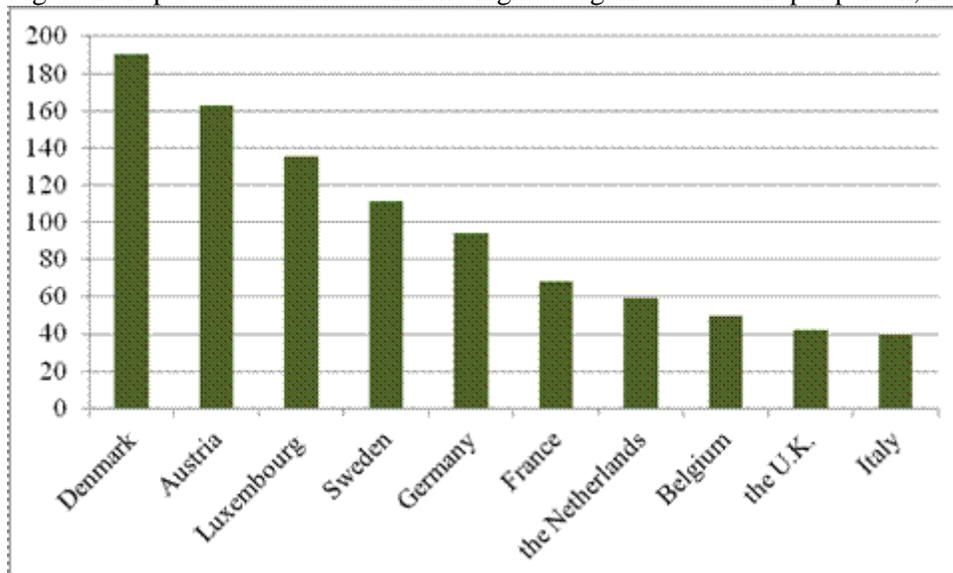
Figure 1. Top 10 largest organic markets in the EU, million USD, 2010 figures



Source: www.organic-world.net, USDA/FAS Estimates

Despite the struggling economy, the demand for organic products in the EU continues to grow. Based on FiBL data, USDA/FAS estimates the EU demand for organic food and drink products in 2010 at 24.5 billion USD^[2], an increase of 7.8 percent compared to the previous year. The largest markets are Germany, France, the UK and Italy as they represent 71 percent of the EU-27 organic market. The highest sales per person of organic food and drinks (over 100 USD per person per year) on the other hand were reached in Denmark, Austria, Luxembourg and Sweden. At the same time there are a dozen Members States with sales of less than 10 USD per person, mainly in Eastern Europe.

Figure 2. Top 10 EU countries with the highest organic sales USD per person, 2010 figures

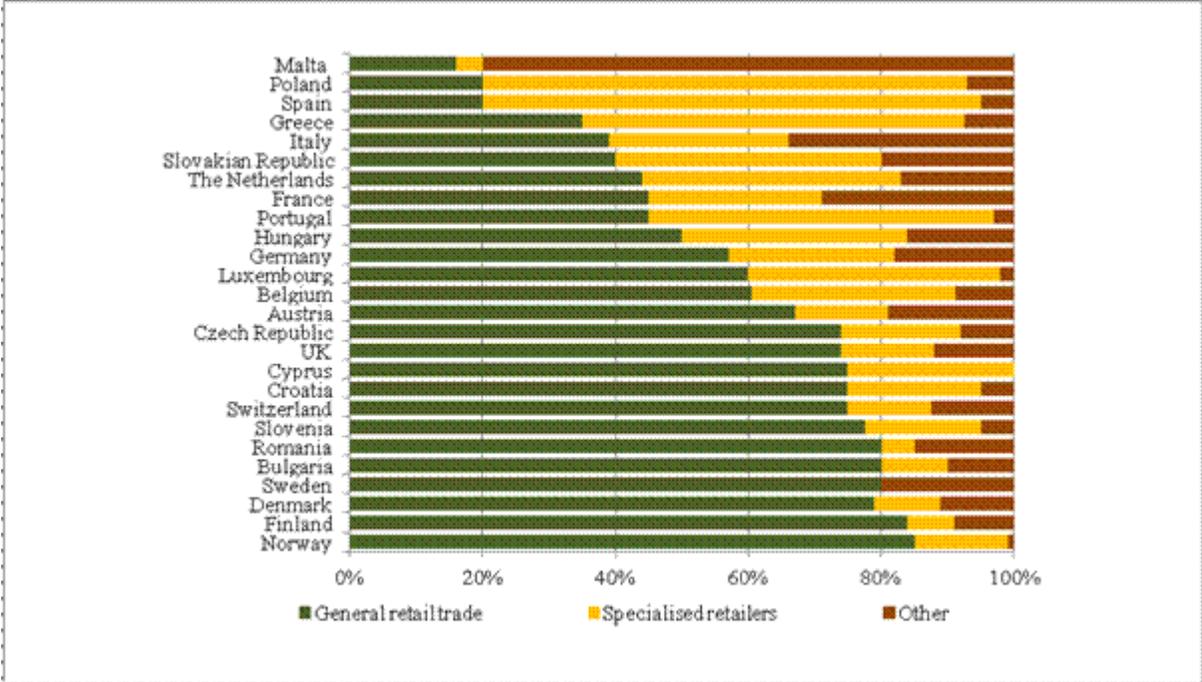


Source: www.organic-world.net, USDA/FAS Estimates

The most important driver is considered to be the predominance of large supermarket chains, which has resulted in a greater availability of organic products. Not only have supermarkets embraced organic products, increasingly they have placed organic products on the shelves next to non-organic (or conventional) products. This has enhanced the availability for a larger audience. Specialty stores of organic products still play an important role as they are also becoming more professional and offer a wider assortment than regular supermarkets.

The distribution of organic products differs considerably between Member States. In the largest markets, the market share for full service supermarkets ranges between 40 to 70 percent of total organic sales. Industry experts believe that this market share will continue to grow. In the U.K., the Nordic countries and Romania most organic food sales are generated in full service supermarkets. In France and the Netherlands the share of supermarkets and organic specialty shops is more evenly divided. In neighboring Germany, discounters and supermarkets dominate the distribution market for organic food, predominantly under private label. In Spain, the fifth largest market, and Poland almost three quarter of organic sales are generated in specialty shops. More information on the individual country’s retail structure can be found in below figure.

Figure 3. Distribution of organic products, various European countries



Source: www.organic-world.net

Consumers of organic products in Europe can roughly be divided in two groups. The first group, the so-called ‘regular buyers’, is a rather small group that has been buying organic products for decades. This group includes environmentalists, lovers of nature, and socially conscious people. Although this group is small, they are responsible for almost half of EU’s organic sales. Regular buyers tend to buy at organic specialty shops or farmers’ markets. For them price is not an important purchasing decision factor.

The second and much bigger group is quite different. Double-Income-No-kids households, older consumers (aged 50-75) and New-Trends seekers will fall in this group. They buy organic products for various reasons, including healthy lifestyle, food safety concerns, animal welfare, sustainability, quality and taste of food, innovative packaging. This group the so-called ‘light buyers’ buys organic products at

supermarkets and to a much lesser extent organic specialty shops. Due to its size and diversity, it is this group that the organic industry will focus on to generate further growth in the near future.

Remarks from various Member States

Coordinated by Marcel Pinckaers/FAS The Hague

Bulgaria:

Bulgaria has an emerging and still very small organic market due to generally low purchasing power. Most locally produced organic products are exported to the EU-15 and the U.S. The U.S. is the major market for locally produced organic herbs, spices and essential oils. Imported organic products dominate with over 70 percent market share. Due to the lack of well established processors, U.S. exporters of processed organic foods and food ingredients may benefit from the Partnership.

Denmark:

Denmark has a long tradition of organic farming and is a leading market with both high domestic organic consumption as well as high organic exports. Denmark is also a country that enjoys strong government support for organic agriculture. Approximately 7 percent of the land area is used for organic farming and the goal is to reach 15 percent by 2020. Denmark has the world's highest per capita sales of organic foods, organic food making up 8 percent of the total food market. In 2011, sales of organic products increased by 10 percent and are estimated to continue to grow by 10-12 percent in 2012. Both organic imports and exports are growing. Dairy products, meat and eggs account for more than half of Denmark's organic exports. In the past few years, the demand for a broad range of organic products has resulted in Danish imports of organic products exceeding exports. Danish imports consist mainly of organic fruits and vegetables, cereal products and animal feed. Although major imports come from other European countries, it is expected that the new Partnership will lead to increased direct imports of U.S. organic products to Denmark.

France:

With a growth of 10.8 percent in 2010 the French organics' market reached almost USD 4.7 billion. According to a 2010 study, over a third of the organic products consumed in France are coming from a foreign country. These products are essentially exotic produce, fruits and vegetables, soy and a variety of grocery products. In 2010, there are 18 French buyers of organic products in France who import from the U.S. The main imported products are dried fruits and exotic fruits, essential oil and aromatic plants. The demand for baby food, pre-packaged pastries, cheese, breakfast cereals, ready to eat meal and canned sauces boomed last year. The French certification agency Ecocert has recently purchased a local U.S. certification agency. The new partnership will certainly open new opportunities for French importers and boost the trade between France and the United States.

Germany/Austria:

Presently, only limited quantities of U.S. organic products enter the EU market via Germany. It is expected that the Partnership will clear out existing differences of import requirements between EU Member States and this will lead to increased direct imports of U.S. organic products into Germany and to a limited extent into Austria.

Italy:

Italy is a major organic producer and competitor. Italy has the largest number of certified organic producers in the EU and is second to Spain for organic farmland. Domestic production consists of mainly grains, olive tree, fruits (including shell fruit), vineyards, citrus fruit, and vegetables that are exported to neighboring countries. While the processing sector is less developed, U.S. exporters of organic food ingredients and high value processed products might benefit from the Partnership.

Presently, only limited quantities of U.S. organic products are exported to Italy. It is expected that the Partnership will facilitate U.S. exports and streamline import requirements between EU Member States and the U.S.

Romania:

The main driver for organic production remains the foreign demand though domestic consumption is on an upward trend. Highly-processed products are mostly imported, while raw materials such as oilseeds, grains, protein products, forest fruits are exported. Domestic consumption consists mainly of fresh fruits and vegetables, processed fruits, herbal tea selection, bread, pasta, dairy products (cow and sheep), eggs, oil, wine, honey. Imports grew significantly in 2010 reaching 46 million USD from about 12 million USD in 2009. Retail stores, mainly full service supermarkets contributed to this expansion, as they have dedicated shelves to organic products, making them more visible and attractive to consumers. In terms of financial support for organic producers, the support package offered starting with 2010 encouraged more farmers to enter this market segment and organic production is expected to further grow in 2011.

Spain:

Spain is a competitor and a potential export market for organics. Domestic production consists primarily in fresh produce that is exported to neighboring countries. While the processing sector is less developed, U.S. exporters of organic food ingredients and high value processed products might benefit from the Partnership between the U.S. and the EU.

Sweden:

Sweden is self sufficient in the area of organic dairy products, where also consumers seem to be sensitive and prefer “domestically produced products”. In Sweden, the demand for organic baby food boomed in 2011.

The Netherlands:

Prior to the Organic Equivalency Cooperation Arrangement, the different views of the U.S. and the Netherlands on issues such as conversion practices occasionally lead to trade disruptions. In the Partnership the U.S. and the EU have agreed to exchange information on how to monitor conversion practices. This will improve and enhance trade between both countries.

The United Kingdom:

Following the inception of the National Organic Program the U.K. had a reciprocal agreement with the U.S. Trade flow has historically been very good. However, the Partnership will remove a sometimes lengthy paperwork step for U.K. importers/U.S. exporters since importers will no longer have to apply to UK authorities for market authorization for each organic import.

Organic HS Codes

Note: The new HS coding likely does not yet fully capture existing organic trade to the EU.
Coordinated by Roswitha Krautgartner/FAS Vienna

In January 2011, the United States introduced specific HS (Harmonized Commodity Description and Coding System) tariff codes for a selected number of “certified organic” fresh or processed agricultural products that are certified to the United States Department of Agriculture National Organic Program (NOP) Regulation or the Canadian Organic Product Regulation. The newly created HS codes allow for tracking U.S. trade statistics on the specified organic products. There is a different set of organic products for exports and imports. The European Union has not yet introduced HS codes for organic products.

An entire list of the selected organic products including detailed product names and the corresponding HS codes can be found under:

http://www.fas.usda.gov/http/organics/2011_List_of_Organic_Trade_Codes.pdf

Export HS codes include:

Potatoes, tomatoes, onions, cauliflower, broccoli, lettuce, carrots, celery, peppers, spinach, oranges, lemons, grapes, blueberries, apples, pears, cherries, strawberries, coffee, tomato sauce.

Import HS codes include:

Peppers, avocados, apples, pears, blueberries, coffee, green tea, black tea, durum wheat, rice, soybeans.

United States' export and import statistic on the above mentioned organic products can be obtained at the USDA's Global Agricultural Trade System Online:

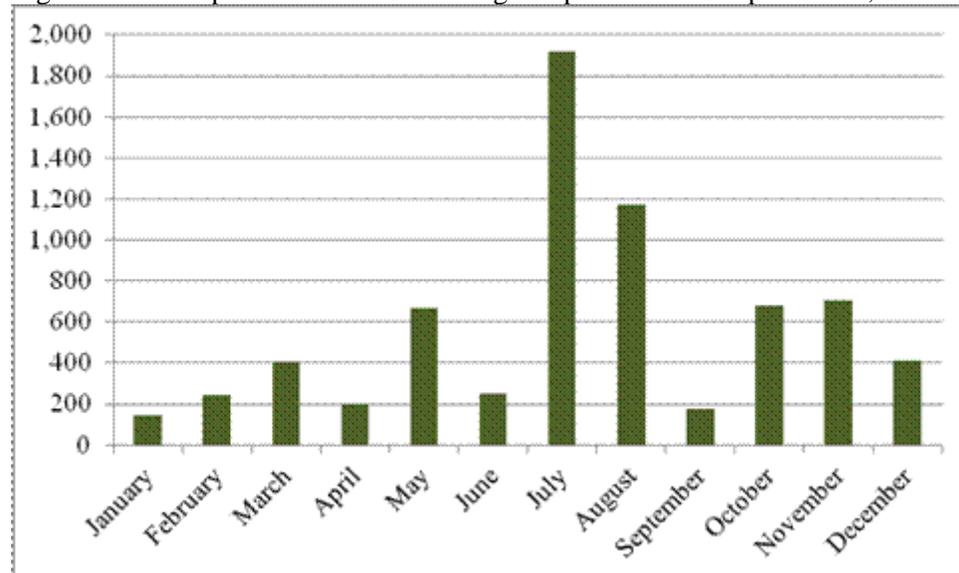
<http://www.fas.usda.gov/gats/default.aspx>

by running a standard query and selecting "Organics-Selected" under "Product Groups".

Important Remark:

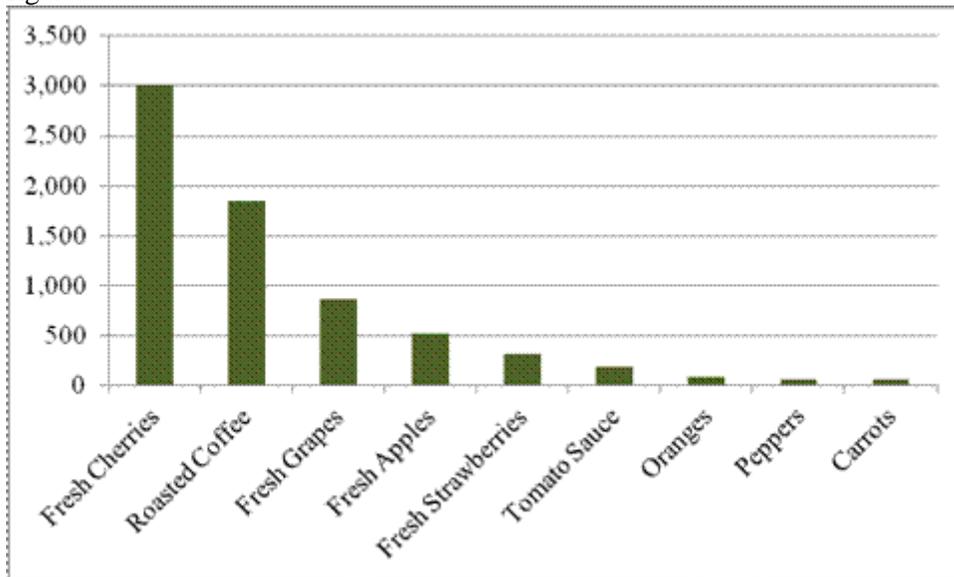
The following statistics and charts include U.S. trade in 2011. Please note that the statistics only represent the trade of organic products where an HS code has been introduced and not the entire organic trade; but the numbers may be used as an indicator for total organic trade. Export codes cover a different set of organic products than import codes. Source for all trade figures is the USDA's Global Agricultural Trade System Online (GATS).

Figure 4. U.S. exports of total selected organic products to EU per month, in thousand USD, 2011 figures



Source: USDA's Global Agricultural Trade System Online

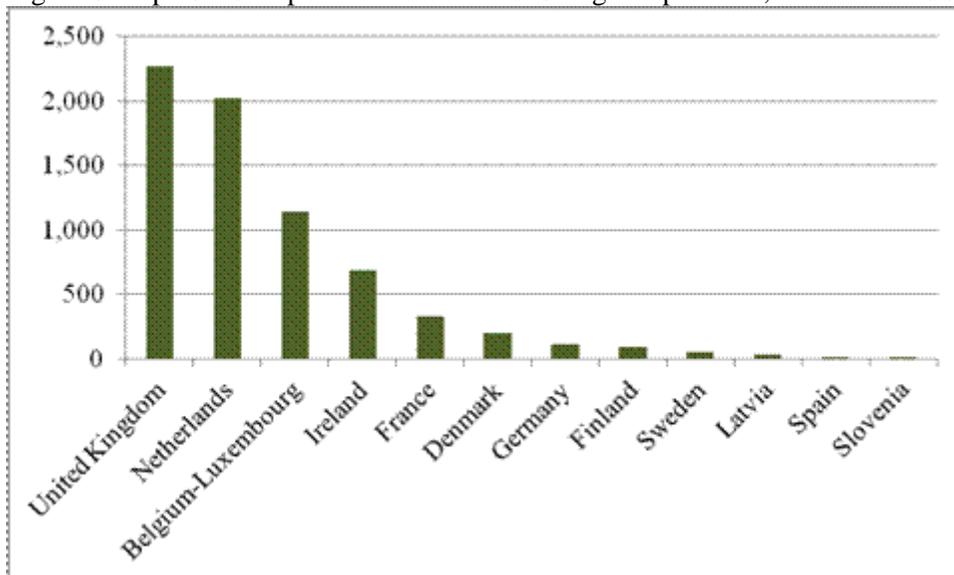
Figure 5. U.S. exports of total selected organic products to EU per product group, in thousand USD, 2011 figures



Source: USDA's Global Agricultural Trade System Online

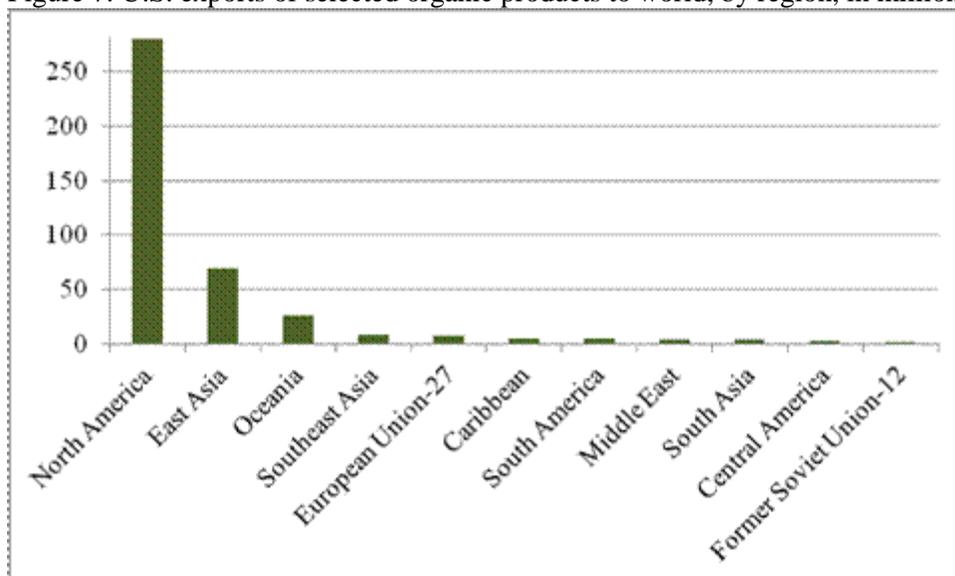
In 2011, the United States exported 7 million USD worth of organic products covered under the new HS codes to the EU-27. Major export commodities included organic fresh cherries, roasted coffee, fresh grapes and fresh apples. Most exports by value occurred during July and August which is due to major fresh cherry exports to the Benelux, United Kingdom and France. The most important EU-27 ports of entry for U.S. organics are The Netherlands, United Kingdom, and Belgium. These three countries imported 78 percent of all U.S. selected organic products. Major EU importers act as distributors and transship organic products to other EU Member States.

Figure 6. Top 10 EU importers of selected U.S. organic products, in thousand USD, 2011 figures



Source: USDA's Global Agricultural Trade System Online

Figure 7. U.S. exports of selected organic products to world, by region, in million USD, 2011 figures



Source: USDA's Global Agricultural Trade System Online

Canada is the most significant market for U.S. organic selected products, reaching an export value of 230 million USD in 2011. Other significant markets include Australia, Hong Kong, Japan, Mexico and Taiwan. Imports to the United States of selected organic products derive to a majority from South America (Peru, Colombia, Brazil), Central America (Costa Rica, Guatemala, Honduras, Nicaragua) Mexico, and Canada.

Identifying new trade opportunities & Table breakdown Sector/Region

Coordinated by Marcel Pinckaers/FAS The Hague

The market for organic products in the EU grew by an estimated 7.8 percent in 2010. This growing demand, in combination with the Partnership between the EU and U.S. offers export opportunities for U.S. companies.

Opportunities in the EU are especially to be found in the following market segments:

- fresh fruit (cherries, grapes, apples, pears, grapefruit, cranberries) – estimated market potential of 10 million USD
- tree nuts (almonds, walnuts, hazelnuts) – estimated market potential of 10 million USD
- dried fruit (raisin, dates, cranberries) – estimated market potential of 8 million USD
- specialty grains (millet, soybeans, wheat, gluten-free for the bakery industry) – estimated market potential of 8 million USD
- vegetables (lentil, olives, sweet potato) – estimated market potential of 5 million USD
- processed products (baby food) – estimated market potential of 2 million USD

The Organic Trade Association (OTA) has a wealth of information and experience in helping U.S. companies in their endeavors expanding business overseas. More information about the OTA and how they can help the U.S. organic industry can be found on <http://www.ota.com/index.html>.

In addition to the OTA, there are various other Cooperators that can be of assistance in promoting your organic commodity overseas. An overview of U.S. commodity cooperators can be found at <http://www.usaedc.org/about.cfm#members> (click on “Click Here for a list of USAEDC Members”). Be aware that not all U.S. cooperators have programs for the EU.

Trade Shows are excellent venues for U.S. exporters to make contact with potential business partners, to conduct product introductions and to gauge buyers’ interest. BioFach is the largest international Trade Show for organic products in the world and is USDA endorsed. Show organizer works with the OTA and FAS to create a U.S. pavilion. More information about BioFach can be found at www.biofach.de.

Below table has been designed to provide you with a more detailed overview of where the export opportunities lie within the EU. In addition to the specific market segments, an estimated size of the market, where the competition comes from, and why it is attractive for U.S. suppliers are covered.

Table 1. Trade opportunities for U.S. exporters on the EU market

| Sector | Region | Estimated size of this organic market, USD | Competition from other suppliers | Attractiveness for U.S. suppliers |
|---------------------------------|---------------------|---|---|--|
| Tree Nuts (almonds and walnuts) | EU-27 | 10 million | Mediterranean countries, Moldova and Iran | Strong and growing demand by the snack and bakery industry; The U.S. dominates international trade. |
| Lentil | EU-27 | 5 million | Canada, India and Turkey | Stable market for lentil in Mediterranean countries. |
| Millet | EU-27 | 1 million | India, Africa and China | Growing demand for specialty grains. |
| Soy beans | EU-27 | 1 million | South America and Asia | Demand for organic soybean by the snack industry. |
| Cranberry products | Benelux | 8 million | Canada | Demand for fresh, dried, sweetened and juice continues to grow; the U.S. dominates international trade. |
| Pears | Benelux | 1.5 million | Southern Hemisphere countries | Seasonal demand (Oct-Feb) for red Anjou and Bosc. |
| Grapefruit | Benelux | 0.5 million | Spain, Greece and Turkey | Strong demand for excellent quality fruit and to a lesser extent organic juice |
| Raisins | Benelux | 0.5 million | Turkey, Israel, Pakistan and Iran | Growing demand for organic dried fruits. |
| Dates | Benelux | 0.5 million | Mediterranean countries and the Middle East | Stable market for dates. |
| Snack Foods | Austria and Germany | 0.2 million | Belgium, Switzerland | Growing demand for environmentally and socially sustainable produced sweets and snacks including organics. |
| Hazelnuts | Austria | 0.3 million | Turkey, Italy | Strong demand for nuts used as ingredients. |

| | | | | |
|-----------------------------|---------------------|-------------|---|--|
| | and Germany | | | United States is second largest supplier for hazelnuts (including conventional hazelnuts). |
| Cherries | Austria and Germany | 0.1 million | Turkey, Netherlands | Growing demand for organic cherries especially outside the European harvesting period (fall, winter and early spring). |
| Coffee Roasted | Austria and Germany | 0.3 million | Switzerland, Italy | Growing demand for organic and fair trade coffee. |
| Apples | UK and Ireland | 3 million | South Africa, New Zealand, Chile, and Italy | Demand for Red Delicious, Braeburn, Empire and Pink Lady. |
| Raisins | UK and Ireland | 3 million | Turkey, Chile, China | Demand from the premium and snacking sectors, especially targeting young children. |
| Pears | UK and Ireland | 1 million | South Africa, Argentina and Italy | Seasonal demand (Oct-Feb) for Red Anjou, Green Anjou and Bosc. Consumers increasingly prefer “Perfectly ripe” pears. |
| Wheat, and Other Grains | UK and Ireland | 1 million | Canada | Demand from processing industry to provide wheat flour and other products for organic baking industry . |
| Wine | UK and Ireland | 1 million | Australia, Chile, New Zealand, Italy | Demand from retail and foodservice outlets. |
| Food Ingredients | Spain | Unknown | Other EU MS | Growing demand for organic ingredients for Spanish organic industry. |
| Almonds and other tree nuts | Spain | Unknown | Domestic production | Growing demand for organic nuts which domestic production cannot satisfy |
| Bakery Products | Spain | Unknown | Domestic and other MS production | Growing demand for organic and gluten free products |
| Olives | Italy and Greece | Unknown | Domestic and other MS production | Growing demand for organic olives and oil |
| Cherries | Sweden and Denmark | Unknown | Germany, Spain, Turkey | Growing demand for quality organic fruit. |
| Cranberry Products | Sweden and Denmark | Unknown | Canada, Chile, Netherlands | Growing demand for organic cranberries. Due to new EU customs duties on US cranberries, importers are now eyeing Chile and other markets. |
| Apples & Pears | Sweden and Denmark | Unknown | Italy, Netherlands, Germany, Belgium, Argentina | Growing demand for organic fresh fruits. Despite fierce competition from EU and southern hemisphere suppliers, there are seasonal demand for premium pears (Oct-Feb) |

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| | | | | and apples (Nordic consumers prefer large red delicious apples at Christmas time (Nov-Dec). |
| Grapefruit | Sweden and Denmark | Unknown | Netherlands, Israel, China | Growing demand for quality organic grapefruit. |
| Raisins | Sweden and Denmark | Unknown | Turkey, Chile, South Africa, Germany | Strong demand for organic raisins. Also as a healthy snack food, given the emphasis that the Scandinavian populations are placing on health, nutrition and fitness. The target group should be both young and adult populations. |
| Tree Nuts | Sweden and Denmark | Unknown | Turkey, Netherlands, Germany | Growing demand for organic nuts. U.S. is the major supplier of tree nuts to Scandinavia. |
| Processed vegetables | Sweden and Denmark | Unknown | Spain, Greece, Turkey, Germany | Growing demand for organic processed vegetables where the variety and availability in Scandinavia is still much more limited than that found in the United States. Regarding packaging, U.S. suppliers need to be aware that retailers are more and more looking to switch from canned products to tetra pack cartons. |
| Wines | Sweden and Denmark | Unknown | South Africa, Italy, Spain, France, Chile | Extremely strong demand for organic wines. In 2011, sales of organic wines in Sweden increased by 40 percent. This trend is forecasted to continue in 2012. |
| Fruit and Vegetables | France | Unknown | Turkey, Spain, Southern Hemisphere countries | Strong demand for both dried and fresh fruits and vegetables. |

Source: USDA/FAS

^[1] Source: Willer, Helga and Kilcher, Lukas (Eds.) (2011) *The World of Organic Agriculture - Statistics and Emerging Trends 2011*. IFOAM, Bonn, and FiBL, Frick

^[2] 1 USD = 0,762 EURO