



**Fortieth Regular Meeting
of the Executive Committee**

**REPORT OF THE INTER-AMERICAN
COMMISSION ON ORGANIC AGRICULTURE
2019- 2020**

June 2020

San Jose, Costa Rica

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ANNEX I. 2030 STRATEGIC PLAN OF THE ICAO

1. BACKGROUND

In 2007, the “First Meeting of the Competent Authorities for Organic Agriculture in Latin America and the Caribbean” was held in the city of Managua, Nicaragua. At this meeting, the Competent Control Authorities (CCAs) ¹ from 16 countries in the region met and resolved to create the Network of Competent Authorities for Organic Agriculture in Latin America and the Caribbean. This network constituted the first immediate antecedent of the Inter-American Commission on Organic Agriculture (ICOA).

The ICOA was established as a Special Commission by the Ministers of Agriculture of the Americas through resolution IICA/CE/Res. 484, on “Coordination Mechanisms for the Development of Organic Agriculture in the Americas”, issued at the Twenty-eighth Regular Meeting of the Executive Committee (EC) of the Inter-American Institute for Cooperation on Agriculture (IICA), held in 2008. At said meeting, the ministers of agriculture entrusted IICA with the responsibility and management of ICOA's Executive Secretariat (ES), and the task of preparing a proposal for the bylaws jointly with the CCAs of the member states of the Commission. Obeying this mandate, in 2009 the ES/ICOA presented a proposal for the bylaws at the Twenty-ninth Regular Meeting of IICA's EC, which was approved by resolution IICA/CE/Res. 506, and subsequently ratified by the Inter-American Board of Agriculture (IABA) through resolution IICA/JIA/Res. 455 at its Fifteenth Regular Meeting. Thus, the first official regional body dedicated to the subject of organic agriculture was formed.

Protected by article 29, paragraph 1 of the ICOA's Bylaws, and through agreement N° 2 of the V Regular General Assembly of the ICOA in Santiago de Chile (May 2013), the Commission approved its Operating Regulations, which set forth in Article 7 that all ICOA Member States will contribute annually the sum of six thousand American dollars (USD 6000.00) to finance the annual work plan and its administrative activity.

With the aim of establishing a legal framework that would ensure the means to favor cooperation between IICA and the ICOA for the implementation of the actions established in the agenda and work plans, the 1st Cooperation Agreement was signed in March 2014 between both institutions. A second Agreement was signed in October 2019 for a period of one year, in which IICA and the ICOA established the new guidelines for cooperation.

As a follow-up to the mandate issued by the IABA, during 2015, and based on the efforts of IICA and the ICOA in previous years, it was possible to convene the Competent Development Authorities (CDAs)² to the VII General Assembly of the IICA on the subject of Organic Agriculture. This initial group of the CDAs signed its Articles of Association as agreement No. 2 of the general minutes, providing inputs to set the strategic pillars to support the promotion of organic agriculture in the hemisphere.

Throughout the six years in which the ICOA has worked with the support of IICA, the Commission has managed, through its actions, to strengthen the development of its markets as well as the national systems that control organic production, to improve information and knowledge management, as well as the promotion of actions and policies to advance and promote organic production.

¹The Competent Control Authorities (CCAs) for organic agriculture are the national entities responsible for ensuring the application and compliance with the technical regulations of the activity and to guarantee the organic condition of the country's products. Among its functions are: to register producers, processors, marketers, input processors, inspectors and certifying agencies of organic production, to audit them and to keep records of the activity.

² The Competent Development Authorities (CDAs) of organic production are the bodies dedicated to the development, promotion and advancement of the organic sector.

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Currently, the ICOA is made up of 19 countries in the Americas as Full Members, which have organic production authorities and rules for regulating the activity: Argentina, Brazil, Bolivia, Chile, Colombia, Costa Rica, Ecuador, El Salvador, United States, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Uruguay and Venezuela. Canada has participated in General Assemblies as an Observer. During 2017 and 2018, Spain and Portugal have respectively joined the Commission as Permanent Observer Members. Currently the ICOA maintains valid agreements with the main benchmark bodies of the sector at the international level; OIRSA, FiBL, IFOAM, as well as in the private sector such as Intereco and Ecovalia (Spain).

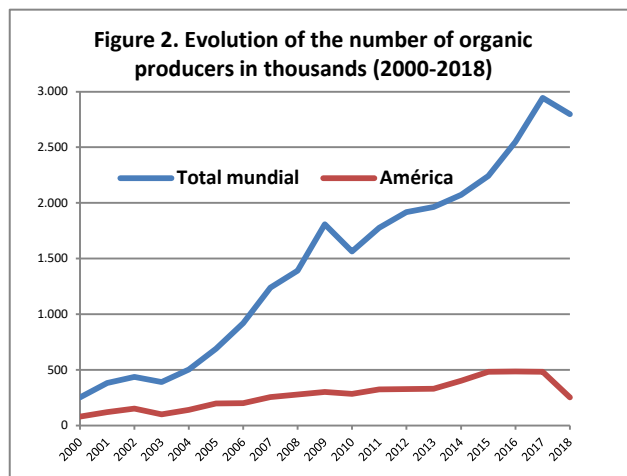
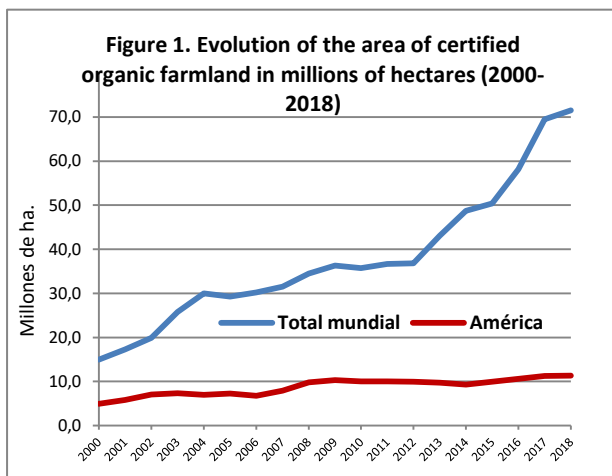
As a result of IICA's new cooperation scheme and the ICOA's emerging needs, it became necessary for the Institute to participate in the Commission's Board of Directors as a permanent member. This change was approved during an Extraordinary Assembly of the ICOA in July 2019. Furthermore, given the need to implement changes at both the institutional (IICA) and organizational (ICOA) levels, the ICOA must also modify its Bylaws. To this end, the Executive Committee of IICA will be asked to entrust the Director General with taking any necessary steps in that regard and submitting them for approval by that governing body of IICA at its Forty-first Regular Meeting.

Currently, the ICOA Board of Directors (BD) is made up of Ecuador –acting as Chair–, Bolivia, Mexico, Brazil and the Technical Cooperation Office (TCO)/IICA. Brazil will host the XII Regular General Assembly of ICOA, which will be held on a date to be determined during the second semester of the current year.

The ICOA, in compliance with the provisions of Article 3, paragraph m, of its Bylaws, submits this report to the Executive Committee of IICA, meeting at its Fortieth Regular Meeting.

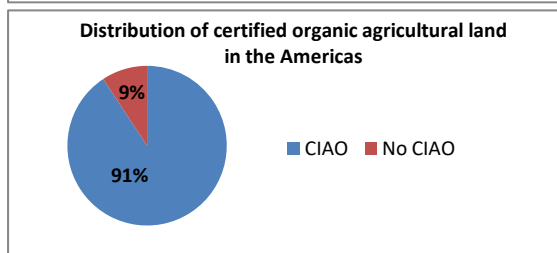
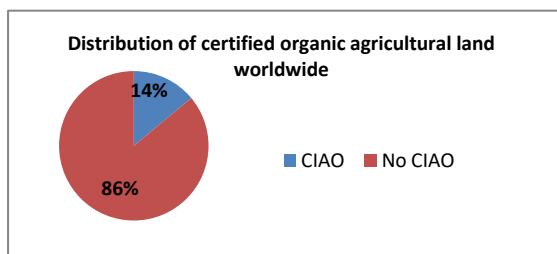
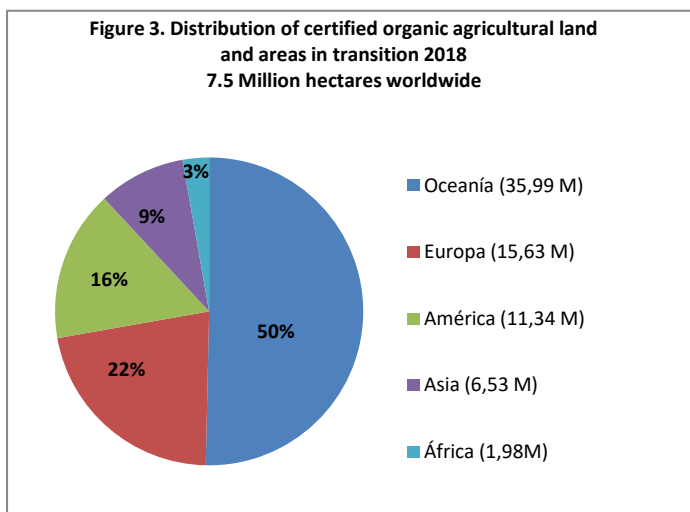
2. ORGANIC AGRICULTURE IN THE AMERICAS IN THE GLOBAL CONTEXT

According to *The World of Organic Agriculture. Statistics & Emerging Trends 2020* (FiBL-IFOAM³, 2020) annual report, the growth trend of the certified area and the number of producers worldwide has kept a consolidated increase since the beginning of the records in the late 1990s, as shown in figures 1 and 2.



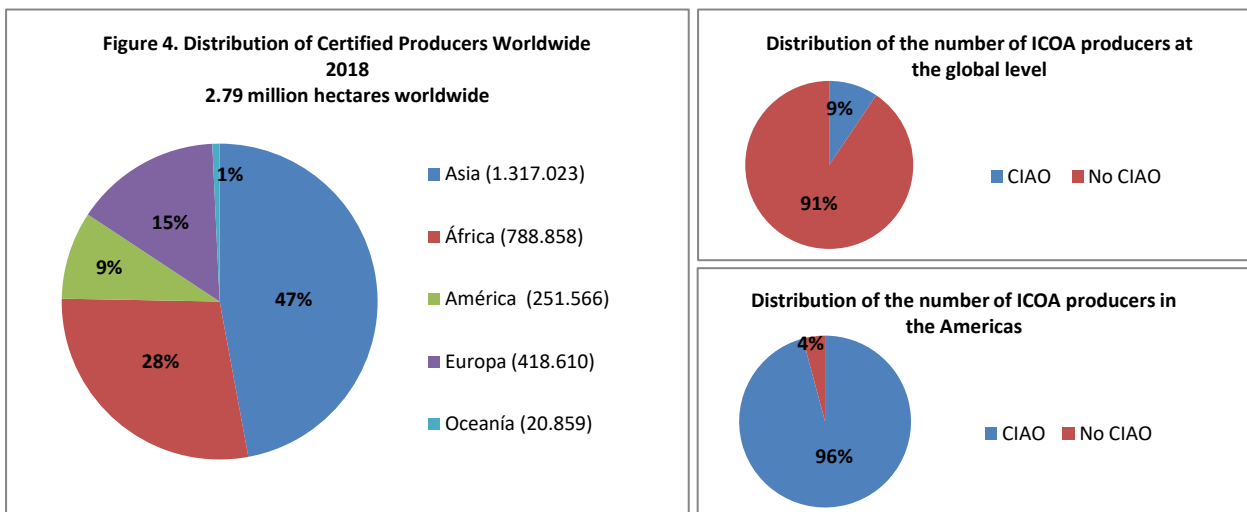
In 2018 (latest updated data) **71.45 million hectares** were recorded as certified and in transition, reaching **1.5% out of the total of productive lands**. It is estimated that this activity has the participation of **2.79 million producers**, of which around 80% are found in developing countries in Asia, Africa and Latin America.

The countries of **The Americas** possess **11.34 million hectares** under organic production, which represents **16%** of the total area dedicated to this type of production worldwide. Latin America and the Caribbean (LAC) represent 8 million hectares, while the United States and Canada have 3.3 million. The member countries of the ICOA represent 81% of the area dedicated to organic production in the Americas, reaching 14% of said area worldwide (Figure 3).



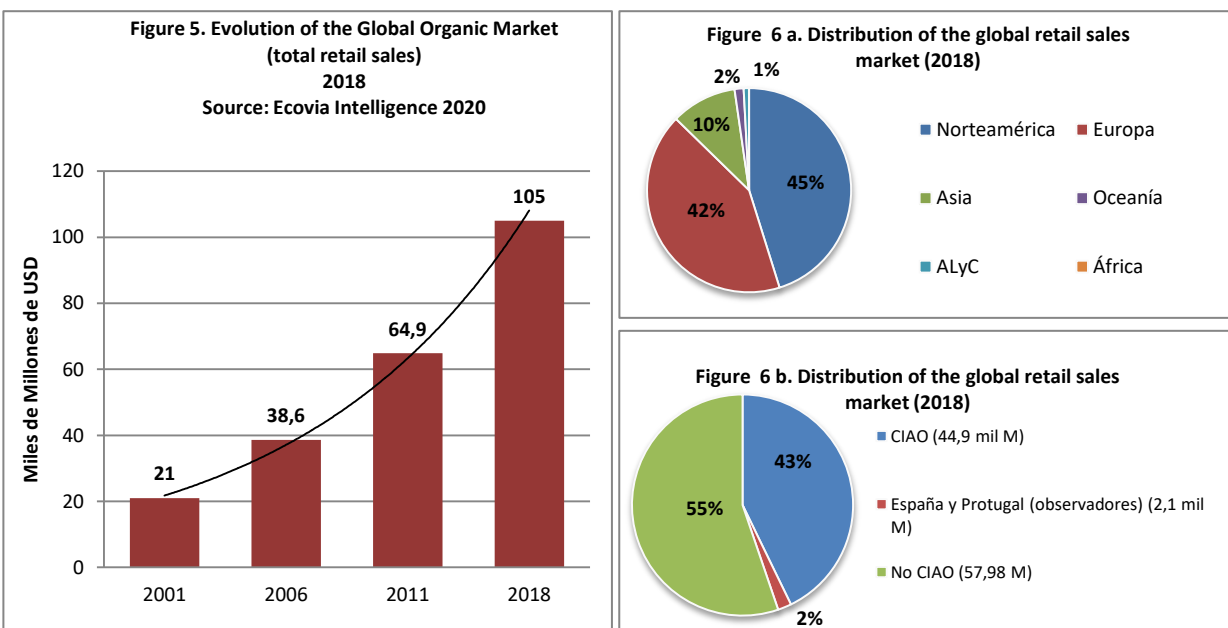
³ FiBL: Forschungsinstitut für biologischen Landbau (Institute for Research in Organic Farming, Switzerland). IFOAM: International Federation of Organic Agriculture Movements.

On the other hand, more than **250 thousand organic producers**⁴ from the American hemisphere represent **9% of all producers worldwide. 96% of the producers in the Americas belong to ICOA countries** (Figure 4)



It is estimated that during 2018, **\$105 billion dollars** were generated in terms of domestic sales⁵ with a firm year-over-year increase of over 10% (Figure 5).

As of 2018, the United States market has the highest volume, with more than 44 billion dollars, representing together with Canada 45% of the global total. It is followed by the European market with 42%



There is a challenge with the number of producers in some countries, as some certifiers and Competent Authorities provide data on all producers, including small members from producer groups, while in other cases only data on group certificates is provided. This problem became particularly marked in the case of Mexico, where the data source changed the criteria, and the new source does not include small farmers, resulting in a significant drop in organic producers in Mexico and Latin America in general. This change in criteria also had an effect on the global number of organic producers: almost 150,000 were registered, or 5.0 percent less producers compared to 2017. Nevertheless, on all other continents, with the exception of Africa, the number of producers increased.

⁵ Ecovia Intelligence

From figure 6. b. it follows that of the total global market, 45% is distributed among the ICOA countries and their partners, mainly due to the weight of the *retail* market from the U.S. The domestic market for LAC is still incipient and less than 1% of the global total and, although there is currently greater awareness of sustainable and healthy production, the region maintains a strong profile as a supplier of raw materials to the most developed markets. The exception in the region is Brazil, which has a marked profile of development of the domestic market as a contribution to food security and family farming.

- **Outlook and challenges for the Americas**

- ✓ To strengthen the policies and strategies that underpin the promotion and development of organic production and its control and promotion systems.
- ✓ To strengthen the public institutional framework necessary to take full advantage of the opportunities provided by the local, regional and global contexts,
- ✓ To link producers with local, regional and international markets, where it is becoming increasingly important to comply with the requirements and demands that regulate the regulations and standards of organic production and trade.
- ✓ The harmonization of national organic production standards among the countries of the region, and the strengthening of national control systems for organic production, are priority tasks to achieve recognition with the main trade partners and to create assurance and confidence on the products of the region, thereby facilitating trade and access to global markets.
- ✓ The creation and/or development of active public policies that include awareness raising, training of producers and consumers, as well as the promotion of new market strategies for organic products at the domestic level.
- ✓ Since the declaration of a pandemic by the WHO due to Covid-19, a change in some consumption patterns towards healthier, safer and more environmentally responsible foods has been detected, the market for organic products has shown significant growth, therefore, it is necessary to create strategies to sustain this growing trend and strengthen the sector in order to consolidate domestic commerce and increase international trade in these products.

3. 2019/20 ONGOING ACTIVITIES AND ACTIONS

3.1. XI ICOA Regular General Assembly:

In August 2019, the XI Regular Meeting of the BD/ICOA and XI Regular General Assembly of the ICOA were held in the City of Santo Domingo (Dominican Republic), with the presence of 11 Member Countries and the special participation of Spain, Portugal, Ecovalia and Intereco.

3.2. Modification of the ICOA's Bylaws and Operating Regulations

The IICA Technical Cooperation Office reported during the 10th ICOA General Assembly (Cusco, August 2018) that the Institute was in a process of re-organizing all technical cooperation mechanisms, seeking to integrate them into the new Medium-Term Plan (MTP) approved by the EC/IICA. Pursuant to the foregoing, and on the particular case of the ICOA, the Technical Cooperation Office of IICA informed the General Assembly the necessary conditions for the signing of a new IICA-ICOA Agreement: the Commission should assume the operating costs of the ES/ICOA, as well as the participation of IICA with the right to speak and vote in the decision-making spaces of the BD/ICOA. These conditions were then to be reflected in the new IICA-ICOA Agreement and the New ICOA Bylaws.

Based on Article 6, paragraph 2 of ICOA's Bylaws, on April 8, 2019 the BD/ICOA decided to convene the member countries to the Special General Assembly on May 13, 2019 in order to explain the reasons why the modification of the Bylaws of the ICOA was requested and the general guidelines for said modification were submitted to a vote, according to Article 13, paragraph 1 of the Bylaws. After the procedure, the Chair of the BD/ICOA informed the General Office of IICA, by note dated July 03, in Quito, the result of the vote, which was favorable to IICA's request.

In view of the foregoing, at the Fortieth Regular Meeting of the Executive Committee of IICA, that governing body will be asked to task the Director General of the Institute and the ICOA members with making any necessary amendments to the ICOA Bylaws, in order to adapt them to the new needs of IICA and of the ICOA member countries. The proposed amendments will be submitted for approval by that governing body of the Institute at its Forty-first Regular Meeting.

3.3. ICOA 2030 Strategic Plan:

The Plan is the result of the joint and participatory work of the countries, through their Development and Control Authorities. The initiative arose during the VIII Annual Meeting of the ICOA, held in the city of Buenos Aires (Argentina) during the month of August 2016. From there, numerous face-to-face and virtual meetings were held, in order to build and share qualified information and provide feedback to the document. With this Plan, the ICOA plans and guides its actions based on the objectives established since its creation, and with a view to contributing to the Sustainable Development Goals (SDGs).

The Plan is set forth in 1. Current Situation (which includes outstanding information on organic production in ICOA countries, including for the first time, their own surveying of Statistics of the organic sector); 2. Future Scenario; 3. Vision, Mission, Strategic Objectives, Indicators and Goals and 4. Action Plan including a 2020-2025 Medium Term Plan.

The ICOA Strategic Plan for 2030 is attached here as **Annex I** for general information purposes.

3.4. ICOA Working Groups

During 2019 and 2020 the ICOA has established the following working groups:

3.4.1. Producer and Internal Control Systems Groups:

With the Coordination of Mexico and Peru, questionnaires were prepared and information was collected from Ecuador, Argentina, Bolivia, Chile, U.S., Spain, Nicaragua, and Paraguay with the objective of evaluating the certification requirements for producer groups. Documents with the positions and references from IFOAM and NOP have been shared following this criterion. At the same time, work was carried out in a common position with respect to the requirements established in the new organic production regulation 848/2018 regarding Producer Groups.

3.4.2. Inputs suitable for organic production:

With the coordination of Chile, Argentina and Mexico, the Terms of Reference for hiring the consultancy were designed, the objective of which is to prepare a Manual of Procedures that meets the essential requirements for the evaluation and authorization of inputs in organic production, covering the scope of agricultural, livestock, aquaculture and processed (transformed) production, which serves as a reference to the ICOA countries.

3.4.3. Organic Integrity:

With the Coordination of the U.S. and with the objective of having Competent Authorities of the ICOA exchange information and good practices on maintaining organic integrity and examine opportunities for collaboration to strengthen the control and its enforcement in the region, a group was formed that will work on: activities related to the control and enforcement by each country; share the training the NOP has on control and enforcement. Share the NOP performance analysis and other research tools. Share updates on recent control and enforcement actions; present the new NOP standard (proposal) "Strengthening Organic Enforcement"; analyze what information or examples related to control the competent authorities can share with each other: trends in the market or in complaint reports; research/concerns about the OC or operators.

3.4.4. Analysis of Supplementary Documents to Reg. EU 848/2018:

With the coordination of Ecuador and the participation of Argentina, Peru, Nicaragua, Ecuador, Paraguay, Chile, Panama, Dominican Republic, Mexico and Brazil, the ICOA countries worked on the analysis of the Supplementary Rules to Regulation EU 848/2018 in order to issue a consensus position at the regional level, especially in relation to the issue of producer groups.

3.5. ICOA Website and Social Networks:

The ICOA newsletter was redesigned into a monthly format fed with news from the sector and ICOA's own content. Similarly, improvements were made to the website through digital updates

and the creation of an exclusive space for the dissemination of news about Covid-19. As for social network profiles, we can conclude that the goals set forth in the Communication Work Plan were met in this period, given that: The ICOA and its actions were made known to a wide network of contacts at the global level; traffic to the ICOA website increased; we contributed to the knowledge of the characteristics of organic products among: consumer public; press and producers, among others, and collaborated in managing knowledge about organic agriculture. To this end, 4 ICOA profiles have been created and are currently operating on social networks, reaching a total of 8,479 followers. Achieving a 30% increase during the year.

3.6. New Agreements with Strategic partners:

During this period, the following cooperation instruments have been signed:

3.6.1. Framework collaboration agreement between the International Regional Organization for Plant and Animal Health (OIRSA) and the ICOA:

Collaboration activities include: Plant health, animal health and food safety in organic production; mutual collaboration in knowledge and dissemination activities including training sessions, presentations, seminars, workshops, forums and conferences;

3.6.2. Memorandum of Understanding between FiBL and the ICOA:

Collaborative activities include those associated with data tools, methods and analysis required for global monitoring of organic agriculture, as well as the dissemination of related products.

As a result of this collaboration, the ICOA has provided official statistical information on organic agriculture at the hemispheric level.

3.6.3. Framework Agreement for the collaboration between IFOAM and the ICOA:

Collaborative activities between the signatory parties aim to: contribute to the promotion of certified organic, ecological or biological agriculture and livestock: mutually collaborate in knowledge exchange and dissemination activities in which presentations, seminars, workshops, forums and conferences may be included, the call and preparation of which will be carried out by mutual agreement; boosting and advertising actions to promote sustainable development, environmental protection and the consumption of organic food.

3.7. Cooperation actions with other institutions:

3.7.1. With OIRSA:

- Forecast Plan for FocR4T in Peru (DGA/MINAGRI; IICA/ICOA; OIRSA; FAO)
- Videoconference on security measures against FocR4T in musaceae in ICOA countries.

3.7.2. With Ecovalia:

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- The ICOA was named Honorary Partner of Ecovalia within the framework of the award ceremony of the Ecovalia - Núñez de Prado National Awards for Research and Defense of Ecological Production, which will take place in Baena (Córdoba).
- Webinar Cycle on "Health and Organic Production": 3 virtual workshops on the positioning of organic agriculture with its nutritional attributes and virtues facing the situation of responding to consumer demands within the food consumption paradigm shift. More than 1,400 people from 30 different countries participated.

3.7.3. With INTERECO:

- Technical cooperation and training of ICOA countries on public certification systems.

3.7.4. With the Ministry of Agriculture and Fisheries, Food and Environment of Spain:

The ministry included ICOA in its national Stand at the Biofach world organic fair, in Nuremberg, Germany. Positioning together with organizations such as IFOAM, FIBL, the public and private sector in Spain and Portugal.

3.7.5. With Organic Food Iberia (OFI):

ICOA countries have been incorporated into the OFI, with special benefits. We actively collaborated in the organization of the 2nd edition of the OFI, which was finally postponed to 2021

3.7.6. Horizontal cooperation on Covid-19 effects:

With the cooperation of the IICA office in Panama, a Post-pandemic Covid-19 Situational Assessment Tool was created to design strategies to face upcoming challenges.

Argentina, Bolivia, Peru, Ecuador, Guatemala, Panama, Paraguay and Nicaragua will apply the tool.

4. FINANCIAL SITUATION OF THE ICOA

The ICOA has an annual budget to finance the activities approved by its General Assembly detailed in its annual work plan, which will be funded by its Member States. At the V Regular General Assembly of the ICOA, the representatives of the ICOA Member States approved the Commission's Operating Regulations, which set forth among its articles, the following details of the commitments regarding the deposit of the annual fee:

- Art. 6: The main resources of the ICOA will come mainly from the fees contributed by the Member States.
- Art. 7: The ICOA Member States will contribute USD 6,000.00 annually to finance the annual work plan and its administrative activity.
- Art. 10: Said fee must be paid during the 1st quarter of each calendar year, financing the annual work plan established for said calendar year. The delay in the payment of the fee conditions the execution of the annual work plan and this will require the Board of Directors to rethink said plan.

In addition, with the aim of specifying some administrative and management aspects of the regular annual fee contributed by the ICOA Member States, the BD-ICOA approved, through Virtual Meeting Minutes No. 02 of 2014, the Manual of Procedures to support the administration of the resources provided under the agreement signed with IICA for this purpose.

As of May 19, the financial statement of the ICOA can be seen in **Table 1**. The detail of fee contributions from Member Countries is detailed in **Table 2**.

Table 1. REF: T-003719-01-USD/FUND: T3D01 FINANCIAL STATEMENT in USD AS OF MAY 19, 2020		
ICOA	REGULAR INCOME CONTRIBUTIONS BY COUNTRIES (USD)	(-) PROJECT EXPENSES (USD)
2014	24.000	7,381.57
2015	24.000	6,087.03
2016	65,750.80	23,262.67
2017	42,031.97	23,621.15
2018	66,000	25,949.26
2019	41,515.32	26,622.41
2020	5,356.40	11,022.85
TOTAL (USD)	268,654.49	123,946.94
BALANCE		USD 144,707.55

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COUNTRY	FEES (1) 2014-2020	CONTRIBUTIONS RECEIVED								BALANCE	Years owed (2)
		2014	2015	2016	2017	2018	2019	2020	Total		
Argentina	40,000.00	6,000.00		6,000.00					12,000.00	28,000.00	2016-20
Bolivia	40,000.00								0.00	40,000.00	2014-20
Brazil	40,000.00								0.00	40,000.00	2014-20
Chile (4)	40,000.00				6,000.00	6,000.00	6,000.00	6,000.00	24,000.00	16,000.00	2014-16
Colombia	40,000.00								0.00	40,000.00	2014-20
Costa Rica (5)	40,000.00								0.00	40,000.00	2014-20
Ecuador	40,000.00	6,000.00		12,000.00	6,000.00		6,000.00		30,000.00	10,000.00	2019-20
El Salvador	40,000.00								0.00	40,000.00	2014-19
U.S. (3)	36,000.00	n/a	6,000.00	6,000.00	6,000.00	6,000.00	6,000.00		30,000.00	6,000.00	2020
Guatemala	40,000.00					30,000.00			30,000.00	10,000.00	2019-20
Honduras	40,000.00								0.00	40,000.00	2014-20
Mexico	40,000.00		12,000.00	6,000.00	6,000.00	6,000.00			30,000.00	10,000.00	2019-20
Nicaragua	40,000.00	6,000.00		17,750.80		6,000.00			29,750.80	10,249.20	2019
Panama	40,000.00			12,000.00	12,000.00	6,000.00	6,000.00		36,000.00	4,000.00	2020
Paraguay	40,000.00	6,000.00	6,000.00	6,000.00	6,031.97	6,000.00	6,000.00		36,031.97	3,968.03	2020
Peru	40,000.00								0.00	40,000.00	2014-20
Dominican Rep,	40,000.00						11,515.32		11,515.32	28,484.68	2016-20
Uruguay	40,000.00								0.00	40,000.00	2014-20
Venezuela	40,000.00								0.00	40,000.00	2014-20
TOTAL	756,000.00	24,000.00	24,000.00	65,750.80	42,031.97	66,000.00	41,515.32	6,000.00	269,298.09	486,701.91	

(1) Annual fee of USD 6,000.00

(2) The contributions received are applied to the oldest fee

(3) The United States joined the ICOA in 2015,

(4) Chile informed the X General Assembly that its fees were computed for 2017 and 2016, clarifying that the country will not be able to pay retroactive fees, The subject is being treated by the BD/ICOA

(5) Costa Rica, by note DSFE-0479-2019 of June 13, 2019, requests that it be excluded from the list of debtors since there is no agreement with the ICOA that guarantees the payment of the fee, The subject is being treated by the BD/ICOA

5. ACKNOWLEDGEMENTS

The ICOA Board of Directors, through its Chair, wishes to express its gratitude to IICA, its General Director, and its Director of Technical Cooperation for the contribution provided through its Executive Secretariat, its offices in the Member States and other levels of the Institute, without which it would not have been possible to show the achievements of this Commission.

Similarly, the ICOA wishes to thank the Ministers and, through them, the Member States, for the support provided in each country during the 2019-2020 period regarding this report.

We trust that this contribution will continue to be returned by the ICOA for the benefit of the countries of the Americas and of organic producers and their families.

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**ANNEX I to the 2019-20 ICOA Report
(FIFTEENTH REGULAR MEETING CE/IICA)**

**STRATEGIC PLAN FOR THE
DEVELOPMENT AND CONTROL OF
ORGANIC AGRICULTURE BY 2030, IN
MEMBER COUNTRIES OF THE INTER-
AMERICAN COMMISSION ON
ORGANIC AGRICULTURE- ICOA**

This documents is the result of the joint and participatory work of the member countries of ICOA, represented through their Development and Control Authorities.

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1. Introduction

This document constitutes the Strategic Plan for the Development and Control of Organic Production by 2030 in ICOA, a technical platform made up of 19 member countries.

The Plan is the result of the joint and participatory work of the countries, through their Development and Control Authorities.

The initiative arose during the VIII Annual Meeting of the ICOA, held in the city of Buenos Aires (Argentina) during the month of August 2016. From there, numerous face-to-face and virtual meetings were held, in order to build and share qualified information and provide feedback to the document.

With this Plan, the ICOA plans and guides its actions based on the objectives established since its creation⁶, and with a view to contributing to the Sustainable Development Goals (SDGs). The following graph shows the direct relationship that exists with at least 10 of these Objectives:



Source: Compiled by author.

Increase Positive Impacts: 1. Value rural production; 2. Promote food security and sovereignty; 3. Healthy and nutritional food; 6. Higher water retention capacity; 8. Formal and profitable work; 11. Value peri-urban spaces; 12. Certificate recognizable by consumer; 13. Climate Smart Agriculture; 15. Increase Biodiversity (+30-50%); 17. Solid Institutional Network;

Reduce Negative Impacts: 1. Reduce unfair competition; 2. Prevents soil degradation; 3. Food without negative health effects; 6. Prevents river and aquifer pollution; 8. Reduces informal work, exploitation and child labor; 11. Resolves conflict through a profitable productive alternative; 12. Minimizes the negative impact on the biosphere;

⁶ Objectives: 1) Facilitation of the trade and market development of organic products, 2) Establishment and strengthening of National Organic Production Control Systems 3) Information and knowledge management 4) Development of Organic Production and 5) Institutional Strengthening.

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13. Sequesters CO₂ from the air into the soil; 15. Prevents mono-crops and soil erosion; 17. Reduces short-term non-inclusive policies

This way we intend to give a new and strong impetus to the integral development of Organic Agriculture, for a sustainable, inclusive and auspicious growth of the economies of the member countries.

In the end, we seek to establish a long-range vision (2030), beginning with action strategies in the medium term (2020-2025) and the creation of annual agendas, to achieve our Strategic Objectives, and fulfill the purpose of our creation.

As time passes, this plan will be supplemented in the medium and short term with actions based on the decisions made by the successive Assemblies.

Therefore, the Plan will allow, to:

- Plan the **strategic route to be progressively followed by the ICOA**, where development and control are integrated, providing strategic objectives, actions, goals, indicators and budgets in a harmonized and agreed upon manner that can be implemented in the short and medium term.
- Strengthen, **generate and reinforce public policies** that promote the development of Organic Agriculture in the countries, and achieve continuity on the part of their government decision-makers.
- Be a guideline for **Strategic Plans for the Development and Control of Organic Production** in ICOA member countries.
- Create an information and monitoring system of Organic Production in member countries, based on standardized indicators.
- Prioritize themes **for the countries, agreed upon in the Assemblies, to be incorporated in the Annual Work Plan** of the ICOA.
- **Determine the progress, achievements, redefine strategies, and forecast** future scenarios that may be outlined.
- Report the situational state of organic agriculture in the member countries, to feed back strategies for developing and controlling this differentiated productive system.

With this, the ICOA will be able to boost the purpose of its creation, invigorating itself as a technical platform for the joint development of the member countries, where the institutional framework of Organic Agriculture is strengthened through its Development and Control Authorities.

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Consequently, it will contribute to the strengthening of the National Control Systems, the harmonization of standards, trade between countries, and the promotion and positioning of this differentiated productive system that positively impacts the environment, biological diversity, consumer and worker health, which gives added value to primary and industrial production and contributes to the roots of the population, territorial development and local markets, guaranteeing food security and sovereignty.

GLOSSARY

Accreditation: action by which an accreditation entity recognizes the technical competence and reliability of certification bodies for the conformity assessment applied to a specific organic regulation.

Approval: process by which a Competent Authority legally recognizes and authorizes an accredited certification body, and the participatory guarantee systems, to perform functions as a certifier for an official regulation.

Authorization/enabling audit: procedure by which an official team of auditors carries out the evaluation of a candidate entity for its accreditation as in conformity assessment body, to verify compliance with official regulations.

Organic certification: act by which an authorized conformity assessment body guarantees in writing that a clearly identified production or process was methodically evaluated and is in conformity with the Organic Production regulations in force.

Development of Organic Production: promotion through various mechanisms and incentives of Organic Production, the processing, commercialization and consumption of organic products in the domestic and international market, for the sustainability of this clean agriculture, which positively impacts food security, the socioeconomic conditions of the country, biological diversity, and the environment; contributing to the achievement of the Sustainable Development Goals (SDGs).

Qualification: procedure by which the competent control authority formally recognizes that a conformity assessment body is authorized to carry out the conformity assessment of organic products, in accordance with the official Organic Production regulations and with the criteria currently in force.

Operator: natural and/or legal person who has signed an agreement for the certification of organic products with a certifying entity authorized by the relevant official control body, which produces, prepares, exports or imports organic products (ecological or biological), with a view to its subsequent commercialization, or who markets such products and who is responsible for ensuring that they comply with official organic regulations.

Conversion period: time elapsed between the start of organic management, collection, vegetable crops or animal husbandry, and its recognition as an Organic Production system.

Participatory Organic Quality Guarantee Systems (PGS): set of activities carried out in a certain organizational structure, with the purpose of ensuring the guarantee that a product, process or service meets the specific regulations or standards and that it was subjected to a conformity assessment in a participatory manner.

2. Current situation

2.1. THE INTER-AMERICAN COMMISSION ON ORGANIC AGRICULTURE

In 2007, the “First Meeting of the Competent Authorities for Organic Agriculture in Latin America and the Caribbean” was held in the city of Managua, Nicaragua. At this meeting, Competent Control Authorities (CCA)⁷ from 16 countries in the region met and resolved to create the Network of Competent Authorities for Organic Agriculture in Latin America and the Caribbean. Said network constituted the first immediate antecedent of the Inter-American Commission on Organic Agriculture (ICOA), later becoming established as such by the ministers of Agriculture of the Americas through Resolution IICA/CE/Res. 484, on “Coordination Mechanisms for the Development of Organic Agriculture in the Americas”, issued at the Twenty-eighth Regular Meeting of the Executive Committee (EC) of the Inter-American Institute for Cooperation on Agriculture (IICA), held in 2008. At that meeting, the ministers of agriculture entrusted IICA with the responsibility and management of ICOA's Executive Secretariat (ES), and the task of preparing a proposal for the bylaws jointly with the CCAs of the member states of the Commission. Observing this mandate, in 2009 the ES of the ICOA presented the proposal for the Bylaws at the Twenty-ninth Regular Meeting of the EC of IICA, which was approved by resolution IICA/CE/Res. 506, and subsequently ratified by the Inter-American Board of Agriculture (IABA) through Resolution IICA/JIA/Res. 455 at its Fifteenth Regular Meeting; thus, the first official regional body working on the subject of organic agriculture was established.

At its first Regular General Assembly held in San José, Costa Rica, in November 2009, and based on the mandates established by the ministers of Agriculture of the Americas, the ICOA established its policy guidelines, which served as the basis for preparing its annual work plans.

With the aim of establishing a legal framework that would ensure the means that favor cooperation between IICA and the ICOA for the implementation of the actions established in the annual work plans, in March 2014 a cooperation agreement was signed between both institutions.

In 2015, the Competent Development Authorities for Organic Agriculture joined the ICOA to undertake integrated work with their Control peers, to achieve a greater boost of Organic Agriculture in the countries of the Americas.

Over the work years that the ICOA has been developing with the support of IICA, it has managed to facilitate trade in organic products and the development of markets, strengthen national organic production control systems, improve information and knowledge management, as well as promoting actions and policies to develop and promote Organic Production.

Currently, the ICOA is made up of 19 countries in the Americas as Full Members, which have control authorities for Organic Production and rules to regulate the activity: Argentina, Brazil, Bolivia, Chile, Colombia, Costa Rica, Ecuador, El Salvador, United States, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Uruguay and Venezuela. Canada has

⁷ The Competent Control Authorities (CCAs) for Organic Agriculture are the bodies responsible in the countries to ensure the application and compliance with the technical regulations of the activity and to guarantee the organic condition of the country's products. Among its functions are to register producers, processors, marketers, input producers, inspectors and certifying agencies for Organic Production, to audit them and to keep records of the activity.

participated in assemblies as an Observer Member. During 2017, Spain joined the Commission as a Permanent Observer Member and, in the course of 2018, authorities from Portugal did the same.

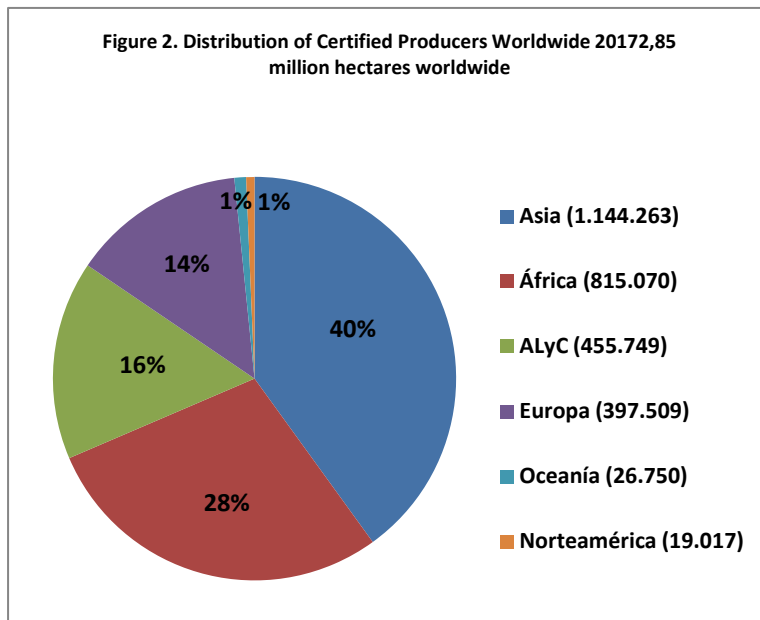
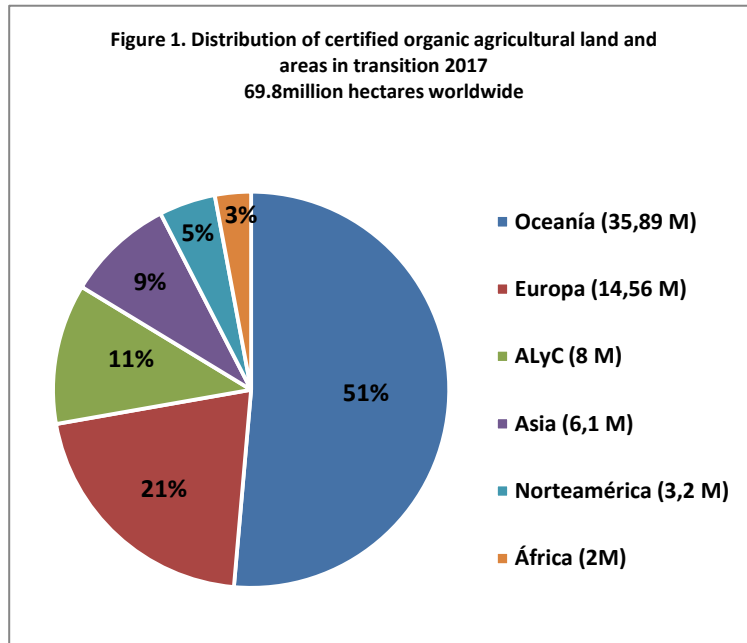
2.2. ORGANIC AGRICULTURE IN ICOA MEMBER COUNTRIES

In most countries of the region, the contributions of Organic Agriculture to the development of the agricultural sectors are associated with sustainable food production, income generation and, to a large extent, food security and the improvement of the quality of life of the producers who engage in this activity, which to a large extent are linked to family farming. Undeniable contributions to the conservation of natural resources, biodiversity and the mitigation of climate change, among others, are also recognized, which are an inherent part of this form of production.

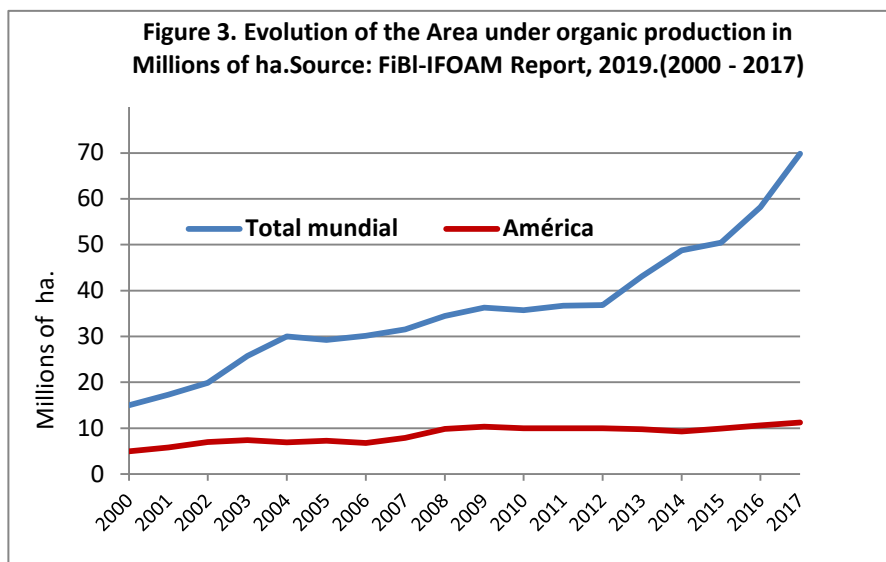
From the 181 countries that possess records on Certified Organic Production, the area dedicated to this type of production in the world is around 69.8 million hectares, including in-transition/conversion land in 2017 (latest data updated at a global level, [FiBL-IFOAM report, 2019](#)). This represents 12 million more hectares compared to the previous year, reaching 1.4% of the total productive land. It is estimated that this activity has the participation of 2.9 million producers, of which around 80% are found in developing countries in Asia, Africa and Latin America. Meanwhile, the largest domestic markets are in the United States and Europe, exceeding between them 90% of the global sales, which generated in 2017 a turnover of almost 97,000 million dollars.

According to this same global report, the countries of the American continent possess 10.05 million hectares under Organic Production, which represents 16% of the total surface dedicated to this type of production worldwide. Latin America and the Caribbean (LAC) represent 8 million hectares, while the United States and Canada have 3.2 million (Figure 1). The member countries of the ICOA represent 88% of the area dedicated to Organic Production in the Americas, reaching more than 14.3% of said area worldwide.

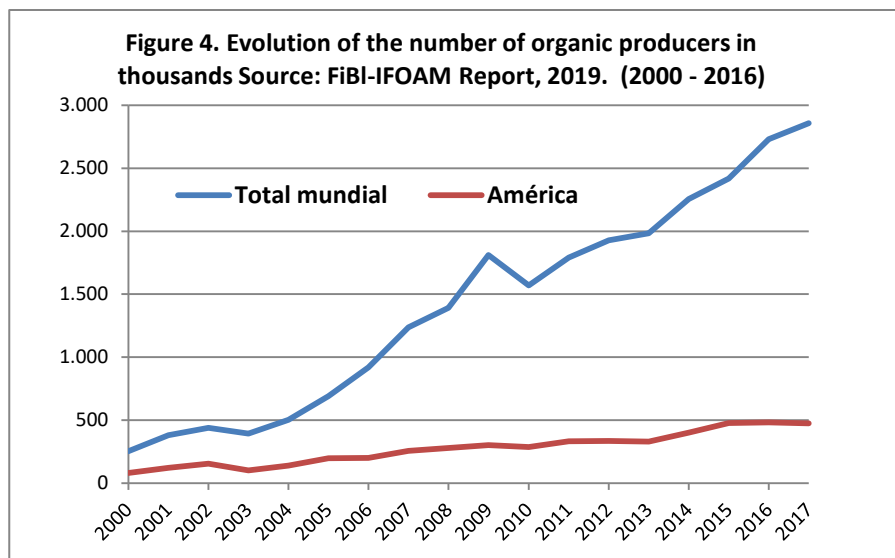
On the other hand, it is estimated that there are close to 475,000 organic producers in the American hemisphere, which represent 17% of the total producers worldwide. Of these, 16% of the total are located in LAC and the remaining 1% in the United States and Canada (Figure 2).



The trend in the increase of the worldwide area has been consolidated since the end of the nineties, quadrupling the area from 1999 to 2017, as seen in Figure 3.

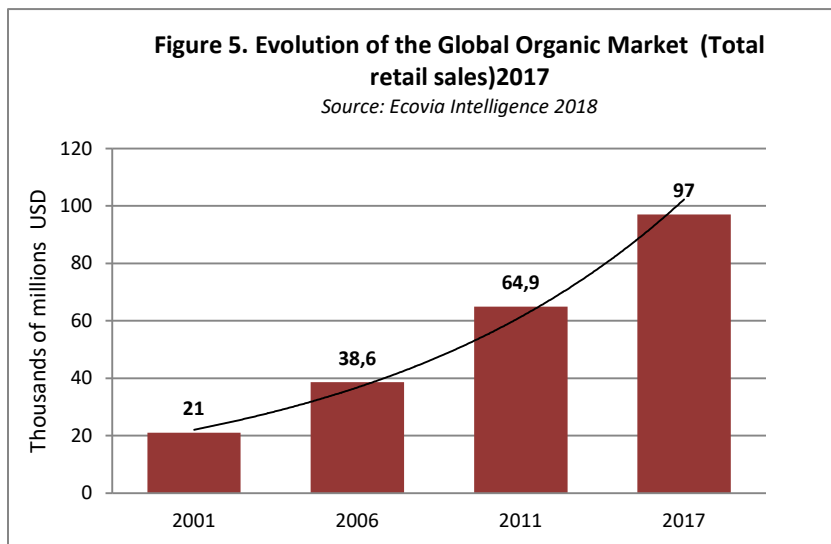


Even more marked was the increase in the number of producers, which went from approximately 200,000 to 2.8 million (Figure 4).



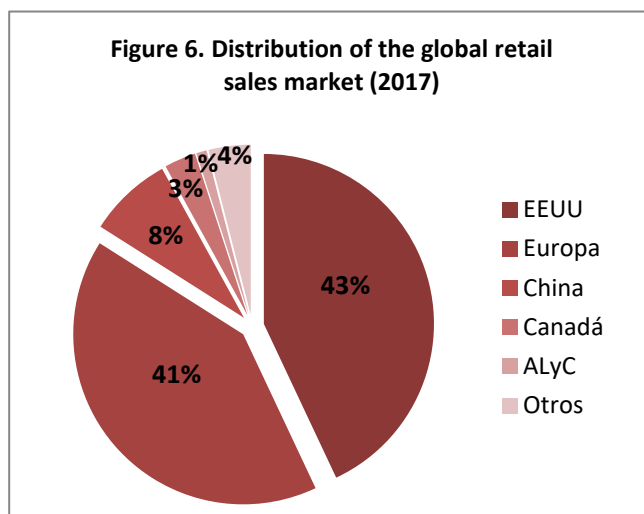
Although the trend is positive for the Americas, the increase is less than that observed worldwide. While on the global surface, the 2000-2017 increase has been 450%, in the Americas it was 225%. The Americas represented 34% of the certified global area in 2001, falling in 2017 to 16%. Regarding the number of producers, the increase in the continent was multiplied by 6 between 2000 and 2017, while globally the increase was more than 10 fold. The Americas represented 31% of the total number of certified producers worldwide in 2000, falling in 2017 to 17%.

It is estimated that during 2017, 97,000 million dollars were generated (*Ecovia Intelligence 2018*) in terms of domestic sales (or 92,000 million Euros, according to the FiBI-IFOAM report), with a firm year-over-year increase of over 10% (Figure 5).



The United States market is the one with the largest volume, with almost 40 billion Euros (or 43.2 billion dollars according to Organic Monitor), representing 43% of the global total. It is followed by the European market with 37.7 billion Euros (41%). The ranking is completed by China with 8%, and Canada with 3%.

The LAC domestic market is still in its infancy, reaching 0.9% of the global total. Although there is currently greater awareness of sustainable and healthy production, the region maintains a strong profile as a supplier to the most developed markets. The exception in the region is Brazil, which has a marked profile of development of the domestic market as a contribution to food security and family farming. (Figure 6).



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To supplement this analysis, we also sought to update the information of each ICOA member country with certain data of statistical interest through a survey, which was completed by Argentina, Brazil, Chile, Ecuador, U.S., Mexico, Nicaragua, Panama, Paraguay, Peru and the Dominican Rep.

This exercise, which was a first attempt to standardize production and product categories as well as vocabulary and different ways of systematizing information, revealed a series of limitations and a real challenge in itself in keeping with the path undertaken by the ICOA. Thus, in view of its complexity, this initiative can be taken as the starting point to be undertaken by a specific work group or agenda item in future meetings, in the sense of seeking to guide all countries towards a good systematization of data for the achievement of annual regional statistics.

Thus, as a diagnosis, the collected data is displayed below:

Total area dedicated to Organic Production:

Total area (hectares)	
Argentina	3,629,968
Bolivia	1,241,670
Brazil	822,406
Chile	113,176
Colombia	No updated data
Costa Rica	No updated data
Ecuador	47,719
U.S.	2,023,430
El Salvador	1,642
Guatemala	200,141
Honduras	48,513
Mexico	1,141,651
Nicaragua	34,324
Panama	3,761,90
Paraguay	38,942
Peru	440,006
Dominican Rep.	131,114
Uruguay	No updated data
Venezuela	No updated data

Area dedicated to Organic Production according to categories:

Area (ha)	Argentina	Chile	El Salvador	Guatemala	Mexico	Nicaragua	Paraguay	Peru	Dominican Republic
Cereals	24,202	292	-	-	2,840	141	400	-	-
Oilseeds	17,500	-	-	-	5,218	14	2,186	-	-
Legumes	2,900	-	-	148	5,953	-	-	-	-
Rice	2,870	-	-	-	400	-	-	-	-
Garlic and/or shallot	757	-	-	-	51	-	-	-	-

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Onion	32	-	-	-	13	-	-	-	-
Cucurbits	187	-	-	58	719	-	-	-	2
Leafy vegetables	188	109	4	-	68	-	-	-	-
Fruit vegetables			-	94	777	-	-	-	-
Tubers and rhizomes			-	-	606	-	-	-	5
Cacao	-	-	-	194	71	4,084	-	40,211	81,399
Coffee	-	-	1,418	12,000	29,802	23,917	-	133,057	329
Stone fruits	736	488	-	-	25	-	-	-	-
Citrus fruits	1,160	-	-	224	11,719	-	636	-	1,482
Pome fruits	4,603	2,356	-	-	39	-	-	-	-
Berries	992	5,734	-	3	262	-	-	-	-
Banana and/or plantain	-	-	-	268	1,540	485	-	11,960	41,483
Aromatic and/or medicinal	21	225	-	-	14	-	248	-	-
Ornamental	-	-	-	-	-	-	-	-	-
Tropical fruits	-	-	-	-	6,854	180	-	-	4,2016
Olive trees	4,040	786	-	-	-	-	-	-	-
Vines	3,575	3,360	-	-	-	-	-	-	-
Dried fruit	280	-	-	61	-	-	-	213,102	-
Peanut	-	-	-	-	-	316	157	-	-
Yerba Mate and/or tea	772	-	-	116	-	-	447	-	-
Stevia	-	-	-	97	1	-	-	-	2
Sugar cane	18,640	-	-	223	620	-	33,842	-	1,000
Andean crops	9	-	-	-	4	-	727	12,067	-
Implanted pastures and greening or forage surface	-	1,147	-	-	13,811	37	300	-	118
Natural grassland	3,365,000	-	-	-	484	-	-	-	83
Intended for beekeeping	397,000	-	-	103	-	-	-	-	-
Intended for wild harvesting	3,900	92,279	-	147	951,957	-	-	-	-
Others (detail):	-	Without productive use: 775 Seeds, seedlings and nursery: 48 Kiwifruit: 116 Other fruit trees: 869	Cashew nut: 171 True Indigo: 14 Roselle: 3 Great morinda: 22 Various: 11	Turmeric: 3 Cardamom: 274 Annatto Seed: 54 Jamaica Pepper: 12 Sapodilla Latex: 18 Avocado: 2 Rambutan: 19 Aloe vera leaves: 75		Sesame: 3,399 Ayote (pumpkin-like Veggie): 5 Roselle: 182 Chia: 463 Turmeric: 135 Ginger: 15 Moringa: 140 Cardamom: 27 Cashew nut: 4 Chia: 5,048 Beans: 693 Tobacco: 45 Vanilla: 39 Lemon grass: 4	-	-	Passion fruit: 8 Coconut: 1,081 Citronella or lemongrass: 8 Moringa: 5 Ginger: 3 Turmeric: 2

The U.S. and Ecuador indicated these crops but did not detail the areas corresponding to each one, while Panama indicated a volume for the selected categories. In turn, Brazil indicated that it does not have official data by category.

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Heads (organic animals):

	Argentina	Chile	U.S.	Mexico
1, Beef Bovines	34,568	338	46,014	5,526
2, Milk Bovines	178		279,021	400
3, Caprinae	21	-	4,475	100
4, Ovine	932,083	541	12,476	470
5, Camelids	1,303	-	-	-
6, Poultry	3,190	-	40,760,712	451,225
7, Porks	-	-	19,817	-
8, Guinea pigs	-	-	-	-
9, Others: Bulls, calves, milk replacement heifers	-	-	256,031	-

Mexico indicated that poultry is for meat only.

Organic hives:

Argentina	33,788
Chile	24,733
El Salvador	4,000
Mexico	100,240
Nicaragua	23,755
Dominican Rep.	1

Organic operators:

	Operators	Primary producers	Producers/processors	Units (producer organizations)
Argentina	1,871	1,366	389	0
Bolivia	29	11,478	26	29
Brazil	19,978	25,227	No data	Not specified
Chile	2,368	1,543	275	550
Colombia	No data	No data	No data	No data
Costa Rica	No data	No data	No data	No data
Ecuador	628	13,792	129	67
U.S.	27,468	19,489	No data	No Data
El Salvador	13	12	10	8
Guatemala	161	95	0	74
Honduras	123	10,071	56	58
Mexico	859	36,289	345	In process
Nicaragua	188	8,286	99	89
Panama	30	33	0	1
Paraguay	22	5,187	12	1
Peru	825	107,152	No data	680
Dominican Rep.	398	16,119	No data	No Data
Uruguay	No data	No data	No data	No data
Venezuela	No data	No data	No data	No data

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Organic Production Volume produced:

	Total volume (tons)	Volume (tons) by category
Argentina	170,000	See next table
Brazil	No Data	There are no figures in production volume, only organically certified hectares.
Chile	No Data	There are no figures in production volume, only organically certified hectares.
U.S.	No Data	Crops were indicated, but not the volumes
Ecuador	759,085	It was indicated only for banana, cacao and coffee
El Salvador	1,303	See next table
Mexico	No Data	It was indicated by crop volume See next table
Guatemala	216,190	See next table
Honduras	103,512	95% coffee, cacao and cashew
Nicaragua	31,730	Crops were indicated, but not the volumes
Panama	1,528	See next table
Paraguay	95,983	See next table
Peru	170,943	See next table
Dominican Republic	1,090,247	See next table

Organic Production Volume produced according to categories:

Volume (T)	Argentina	Ecuador	Guatemala	Mexico	Nicaragua	Panama	Paraguay	Peru	Dominican Republic
Cereals	30,000	-	-	25,131	405	2	1,200	-	-
Oilseeds	20,000	-	-	-	27	-	56,446	-	-
Legumes	471	-	4,282	-	-	2	1	-	-
Rice	4,000	-	-	2	-	-	-	-	-
Garlic and/or shallot	3,000	-	-	-	-	-	-	-	-
Onion	21	-	-	-	-	1	2	-	-
Cucurbits	2,500	-	-	-	70	6	6	-	-
Leafy vegetables	No Data	-	-	-	-	28	-	-	-
Green shoots	-	-	-	-	-	-	-	-	-
Fruit vegetables	No Data	-	574	-	-	24	8	-	-
Tubers and rhizomes	No Data	-	-	-	-	17	3	-	-
Cacao	-	9,637	36	11	1,278	328	-	23,913	70,625
Coffee	-	2,183	15,947	33,066	18,265	155	-	96,593	108
Stone fruits	217	-	-	-	-	-	-	-	-
Citrus	211	-	6,604	-	-	39	7,3471	-	18,600
Pome fruits	46,000	-	-	-	-	-	-	-	-
Berries	1,250	-	400	3,220	-	1	-	-	-
Banana and/or plantain	-	747,265	20	-	767	53	4	31,253	940,353
Aromatic and/or medicinal	21	-	-	-	22	3	365	-	-
Ornamental	-	-	-	-	-	-	-	-	-
Tropical fruits	-	-	-	-	4	4	2	-	40,827
Olives/Olive trees	-	-	-	-	-	-	-	-	-
Grapes/Vines	-	-	-	-	-	-	-	-	-
Dried fruit	111	-	5	-	-	-	-	5,450	-
Peanut	-	-	-	-	1,330	-	595	-	-

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Yerba mate	182	-	-	-	-	-	2,271	-	-
Tea	-	-	48	-	-	-	-	-	-
Stevia	-	-	2,000	-	-	-	-	-	2
Forage feed and/or concentrates	730	-	-	-	2,299	1	-	-	-
Andean crops	683	-	-	-	-	-	1,511	13,735	-
Honey	328	-	106	283	1,564	-	-	-	9
Wool	780	-	-	-	-	-	-	-	-
Others (detail):	-	-	Ramón Seed: 243 Jamaica Pepper: 124 Sapodilla Latex:46 Annatto Seed: 93 Turmeric: 60 Cardamom: 555 Avocado: 10 Sugar cane: 10,130 Rambutan: 106 Aloe vera leaves: 32	-	Chia: 202 Marango: 2,126 Cardamom: 41 Beans: 42 Turmeric: 301 Ginger: 27	-	-	-	Coconut: 3,244 Ginger: 10 Citronella grass: 113 Passion fruit: 10

Mexico indicated only the crops with the highest volume.

Exports of organic products:

	Total volume (tons)	Volume (tons) by category
Argentina	165,866	See next table
Brazil	No Data	No Data
Chile	84,763	Crops were indicated, but not the volumes
U.S.	341,037	Crops were indicated, but not the volumes
Ecuador	414,830	The total corresponds to the value of bananas
El Salvador	602	See next table
Guatemala	No Data	Approximately 98% of the volume is exported
Mexico	110,745 (Only to the EU)	See next table
Nicaragua	11,891	Only indicated crops, but not volumes
Panama	812	See next table
Paraguay	95,983	See next table
Peru	No Data	No Data
Dominican Rep.	No Data	See next table

Exports of organic products according to categories:

Volume (T)	Argentina	El Salvador	Nicaragua	Panama	Paraguay	Dominican Republic
Cereals	29,600	-	-	-	1,200	-
Oilseeds	19,800	-	1,251	-	137	-
Legumes	144	-	-	-	-	-
Rice	4,000	-	-	-	-	-
Garlic and/or shallot	3,000	-	-	-	-	-
Onion	21	-	-	-	-	-
Cucurbits	2,500	-	-	-	-	-
Leafy vegetables	-	-	-	-	-	-
Asparagus	14	-	-	-	-	-

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Fruit vegetables	-	-	-	-	-	-
Tubers and rhizomes	-	-	-	-	-	-
Cacao	-	-	150	280	-	70,625
Coffee	-	586	9,977	-	-	108
Stone fruits	94	-	-	-	-	-
Citrus	590	-	-	-	248	18,600
Pome fruits	45,000	-	-	-	-	-
Berries	1,250	-	-	-	-	-
Banana and/or plantain	-	-	-	-	-	940,353
Aromatic and/or medicinal	21	-	-	-	176	-
Ornamental	-	-	-	-	-	-
Tropical fruits	-	-	245	-	-	40,827
Olives	-	-	-	-	-	-
Grapes/Vines	-	-	-	-	-	-
Dried fruit	111	-	-	-	-	-
Peanut	-	-	188	-	518	-
Yerba mate	182	-	-	-	29,682	-
Tea	-	-	-	-	-	-
Stevia	-	-	-	-	-	2
Meat and its by-products	2	-	-	-	-	-
Andean crops	683	-	-	-	298	-
Honey	327	-	17	-	-	9
Wool	772	-	-	-	-	-
Others (detail):	-	Cashew: 17	Cashew: 12 Chia: 208	-	-	Coconut: 3,244 Ginger: 10 Citronella grass: 113 Passion fruit: 10

Exported value of organic products:

Exported value (U\$S)		Destination countries
Argentina	No Data	U.S., EU, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Ecuador, Guatemala, Honduras, Mexico, Panama, Peru, Paraguay, Puerto Rico, Trinidad and Tobago, Uruguay, Switzerland, Japan
Brazil	No Data	No Data
Chile	290,723,689	U.S., EU, Canada
Ecuador	415,325	U.S., EU
U.S.*	619,596,000	90 countries (no detail)
El Salvador	No Data	Norway, Canada, United States, Germany, France, Japan, Taiwan
Guatemala	No Data	U.S. EU, Japan, Canada
Honduras	No Data	Australia, Belgium, Canada, China, Denmark, El Salvador, Germany, Spain, United States, Finland, France, Guatemala, Netherlands, England, Ireland, Italy, Japan, Mexico, Nicaragua, Norway, United Kingdom, Russia, South Africa, Sweden, Switzerland, Taiwan
Mexico	392,000,000	Estimated for the USA and Canada
Nicaragua	44,486,317	U.S., EU, Canada, Mexico, Central America,
Panama	No data	EU, U.S.,
Paraguay	No Data	Canada, EU, U.S., Peru, New Zealand, England, Australia, Dominican Republic, Holland, Brazil, Uruguay, Mexico, Costa Rica, Korea, Egypt, Saudi Arabia, Japan, Argentina, Chile, Japan, Argentina, Switzerland and Taiwan
Peru	438,000,000	U.S., EU, Japan
Dominican Rep.	500,000,000	U.S., EU, Japan, Canada, Caribbean Islands

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* Not all exports are counted.

Domestic market for organic products:

	Total volume (tons)	Volume (tons) by category
Argentina	547	Cereals 62, Oilseeds 1.3, Legumes 0.5, Rice 29, Garlic and/or shallot 12, Onion 17, Cucurbits 27, Tubers and rhizomes 32, Citrus 0.3, Pome fruits 12.5, Berries 0.7, Wine 3, Dried fruits 0.25, Yerba mate 188, Tea 1.3, Sugar 57, Andean crops 1, Honey 6.5, Meat and its by-products 1.8, Dairy 1.5
Brazil	No Data	No Data
Chile	Area data only	No Data
Ecuador	8.000	Crops were indicated, but not the volumes
U.S.*	No Data	No Data
El Salvador	701	No Data
Guatemala	No Data	No Data
Honduras	No Data	No Data
Mexico	No Data	It is estimated that 20% goes to the national market
Nicaragua	No Data	No Data
Panama	716	Cereals 1.89, Oilseeds 0.14, Legumes 1.74, Garlic and/or shallot 0.05, Onion 0.6, Cucurbits 5.75, Leafy vegetables 27.6, Green shoots 0.15, Fruit vegetables 24,095, Tubers and rhizomes 16.6, Cacao 48,644, Coffee 155, Citrus 38.73, Berries 1,1, Banana and/or plantain 53,395, Aromatic and/or medicinal 3,053, Tropical fruits 4,101, Forage feed and/or concentrates 0.6
Paraguay	No Data	Onion 2, Cucurbits 5,643, Fruit vegetables 8, tubers and rhizomes 2, citrus 2, banana and plantain 2, peanut 1, yerba mate 116
Peru	No Data	No Data
Dominican Rep.	No Data	No Data

Imports of organic products:

	Total volume (tons)	Volume (tons) by category
Argentina	Organic products are not imported	
Brazil	No Data	
Chile	5.625	No Data
Ecuador	Organic products are not imported	
U.S.	1.737.773	Crops were indicated, but not the volumes
El Salvador	No Data	
Guatemala	No Data	
Mexico	No Data	There is no volume data but an import value of US \$ 183,000,000 from the U.S. and Canada was indicated.
Nicaragua	No Data	
Panama	No Data	
Paraguay	No Data	
Peru	No Data	
Dominican Rep.	No Data	

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Industrialization (processing/added value) of organic products:

	Total volume (tons)	Volume (tons) by category
Argentina	62.000	Flours, granolas, textured products, breakfast cereals and/or baked goods 5, 867 oil, juices and/or pulps concentrated or not, and or dehydrated and/or essential oil and/or essence and/or jams or jellies, mashed 16,384, packaged aromatic and/or medicinal 21, olive oil 282, wine and sparkling wines 7,753, raisins 925, packed dried fruits or in bars 111, yerba mate and/or tea packaged and/or processed 183, sugar 21,263, seaweed (packaged) 47, processed wool, combed wool, garments 724, meat and its by-products 2
Brazil	No Data	No Data
Chile	The SAG does not handle data on volumes produced only hectares	The SAG does not handle data on volumes produced only hectares
Ecuador	3.700	Chocolate, packaged coffee
U.S.	No Data	No Data
El Salvador	1.080	No Data
Guatemala	No Data	No Data
Mexico	No Data	There are a total of 1,903 processed products of which the following stand out: coffee, agave syrup, honey, tequila, flours, oils, piloncillo, coconut fiber, juices, jams, pickles and dehydrated products
Nicaragua	1.429	Juices and/or pulps concentrated or not, and/or dehydrated and/or jams and/or tropical fruit jellies
Panama	No Data	No Data
Paraguay	215.850	Juices and/or pulps concentrated or not, and/or dehydrated, and/or puree and/or jams or fruit jellies with pits 300, yerba mate and/or packed tea and/or processed 2,271, sugar 75,196, alcohol 123,855, molasses 14,228
Peru	71.291	8,456 chocolate, 49,734 packaged coffee, 12,003 dehydrated banana and/or plantain, packaged and/or processed Andean crops such as flour, granolas, etc. 1,099
Dominican Rep.	No Data	No Data

More information:

Access link to official Statistics of the Organic Production sector	
Argentina	<ul style="list-style-type: none"> • http://www.alimentosargentinos.gob.ar/HomeAlimentos/Organicos/estadisticas_oficiales.php • https://www.argentina.gob.ar/senasa/mercados-y-estadisticas/estadisticas/produccion-organica
Brazil	<ul style="list-style-type: none"> • http://www.agricultura.gov.br/assuntos/sustentabilidade/organicos
Chile	<ul style="list-style-type: none"> • https://www.sag.gob.cl/sites/default/files/datos_de_produccion_organica_ano_2018.pdf
U.S.	<ul style="list-style-type: none"> • https://downloads.usda.library.cornell.edu/usda-esmis/files/zg64tk92g/70795b52w/4m90dz33q/OrganicProduction-09-20-2017_correction.pdf • https://apps.fas.usda.gov/gats/ExpressQuery1.aspx • https://organic.ams.usda.gov/Integrity/Default.aspx • https://www.nass.usda.gov/Surveys/Guide_to_NASS_Surveys/Organic_Production/index.php • https://www.fas.usda.gov/commodities/organic-products and https://apps.fas.usda.gov/GATS/ExpressQuery1.aspx • https://www.ams.usda.gov/market-news/organic
Ecuador	<ul style="list-style-type: none"> • http://www.agrocalidad.gob.ec/direccion-de-organicos/

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Mexico	<ul style="list-style-type: none"> • https://nube.siap.gob.mx/gobmx_publicaciones_siap/pag/2018/Atlas-Agroalimentario-2018 • https://datos.gob.mx/ • https://www.gob.mx/siap/documentos/siap-senasica-informacion-de-produccion-organica-2016
Nicaragua	Does not exist.
Panama	Does not exist.
Paraguay	Yes, but it is not updated.
Peru	<ul style="list-style-type: none"> • https://www.senasa.gob.pe/senasa/informacion-de-interes/
Dominican Republic	Does not exist.

By way of conclusion regarding this section of collected statistical data, partly incomplete and partly estimated, the limitations found and opportunities for improvement to obtain ordered and qualified information are listed below:

- Many countries do not survey all products or they do so by groups, by area and not by volume, or by different categories.
- There are disaggregated figures in many countries and/or their groupings duplicate information, as well as being highly dynamic for many crops (e.g., vegetables).
- Selecting and obtaining precise data of the products considered as processed or with added value is a complex task.
- Regarding market data, whether external/domestic or export/import data, there is an extra difficulty in being at the hands of national customs services and/or estimates provided by the private sector. If there were specific tariff fractions for organic products, as is the case of Chile, more and better information could be obtained.
- Once a data system for the region is standardized or harmonized, it would be possible to make better comparisons, make sums and generate totals as ICOA, and even the percentage share of the countries could be visualized.
- Regarding the figures, it is important to know the cut-off date of each case, as well as whether they are estimates or not.
- In the case of per capita consumption or other indicators, it is possible that a methodology will be developed through the ICOA and this will be applied to the countries in order to collect this information.

The current scenario below is completed in terms of the institutional framework according to different items that compose it and which are detailed here.

2.2.1 CONTROL INSTRUMENTS

The following are different results related to the **National Control Systems (NCS)**, which are summarized in the following tables:

Argentina	Bolivia	Brazil	Chile	Colombia	Costa Rica	Ecuador	U.S.	El Salvador
Law	Law	Law	Law	-	Law	Law	Law	-
Decree	-	Decree	Decree	-	Decree	-	-	-
-	-	-	-	-	-	Ministerial agreement	Regulations	Regulations
Resolution	-	-	Resolution	Resolution	-	Resolution	-	-
-	-	Supplementary regulatory	-	-	-	-	Instructions Guidelines	Instructions

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		instructions					Rules	
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Guatemala	Honduras	Mexico	Nicaragua	Panama	Paraguay	Peru	Dominican Republic
-	-	Law	Law	Law	Law	Law	-
-	-	-	-	Decree	Decree	Decree	Decree
Ministerial agreement	Ministerial agreement	Agreement on the Guidelines for Organic Production and Agreement for the use of a National Logo	-	-	-	-	-
-	-	-	-	Resolution	Resolution	-	Resolution
-	-	Regulation	Regulation	-	-	-	Regulation

It should be taken into account that the countries of Guatemala, El Salvador, Honduras, Nicaragua, Costa Rica and Panama have agreed to the Central American Technical Regulation (RTCA 67.06.74: 16) that will enter into force on 10/25/2019 (except for Costa Rica).

All countries indicate that they have official regulations for the control and certification of Organic Production, the scope of which covers both plant production and the processing stage, while "cosmetic" products are not covered by any regulations. All of these results are summarized below:

	Vegetable prod.	Animal prod.	Aquaculture	Apiarian	Mushrooms	Algae	Wild Gathering	Process	Alcoholic drinks.	Cosmetics
Argentina	X	X	X	X	X	X	X	X	X	-
Bolivia	X	X	X	X	-	-	X	X	-	-
Brazil	X	X	X	X	X	-	X	X	X	-
Chile	X	X	-	X	X	-	X	X	X	-
Colombia	X	X	-	X	-	-	-	X	-	-
Costa Rica	X	-	-	-	-	-	X	X	-	-
El Salvador	X	X	-	X	-	-	-	X	-	-
Ecuador	X	X	X	X	X	X	X	X	-	-
U.S.	X	X	-	X	X	X	X	X	X	-
Honduras	X	X	-	X	-	-	X	X	-	-
Mexico	X	X	X	X	X	-	X	X	X	-
Nicaragua	X	X	-	X	-	-	-	X	-	-
Panama	X	X	-	X	-	-	X	X	-	-
Paraguay	X	-	-	-	-	-	X	X	-	-
Peru	X	X	-	X	-	-	X	X	-	-
Dominican Rep.	X	-	-	X	-	-	X	X	-	-

Regarding the relevant aspects that are contemplated by official regulations, the results are set out below:

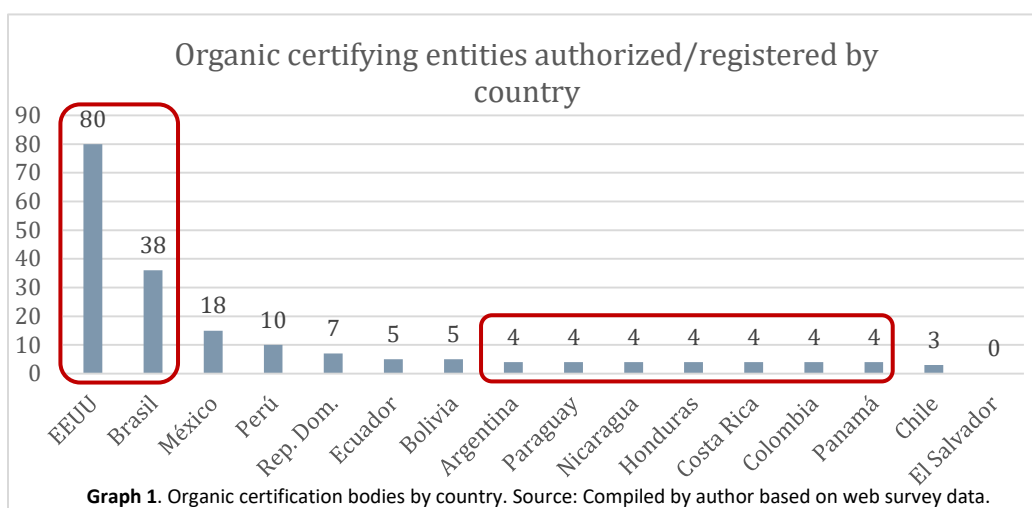
	Labeling	Commercialization	Producer Groups	Compliance and enforcement	Inputs/materials	National logo
Argentina	X	X	-	X	X	X
Bolivia	X	X	X	X	X	X
Brazil	X	X	X	X	X	X

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Chile	X	X	-	X	X	X
Colombia	X	X	X	X	X	X
Costa Rica	X	X	X	-	X	-
Ecuador	X	X	X	X	X	X
El Salvador	X	X	X	X	X	-
U.S.	X	X	X	X	X	X
Honduras	X	X	X	X	X	-
Mexico	X	X	X	X	X	X
Nicaragua	X	X	X	X	X	-
Panama	X	X	X	X	X	X
Paraguay	X	X	X	-	-	-
Peru	X	X	X	X	X	X
Dominican Republic	X	X	X	X	X	X

Regarding the qualification of the certifying entities, the responses indicate that it is the competent control authority of each NCS that performs this task in all countries.

The number of certifying entities varies by country, with the U.S. having the largest number, followed by Brazil, Mexico, Peru, Dominican Rep., Ecuador and Bolivia. Only El Salvador does not yet have its own certifying entities. All the data are detailed in the following graph:



Regarding the possibility of **Public Certification (PC)** for Organic Production, this is foreseen in the official regulations of Argentina, Paraguay, Bolivia, U.S., Nicaragua, Mexico, Colombia, Chile, Panama and the Dominican Rep. At the moment, this type of certification is operational in the U.S., Colombia, Panama and the Dominican Republic.

Certification under **Internal Control Systems (ICS)** is contemplated in the official regulations of countries such as Ecuador, Peru, Bolivia, U.S., Mexico, Honduras, Nicaragua, Colombia, Chile, Panama

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and the Dominican Republic. Of these countries, only in Honduras and Colombia it is not feasible to use the national logo, while the scope (local, national and/or international) varies according to each country.

Participatory Guarantee Systems (PGS) are covered by the official regulations of Ecuador, Peru, Paraguay, Bolivia, Mexico, Costa Rica, Chile, and the Dominican Republic and Brazil. The scope varies between local, national and/or international, depending on each country. Likewise, only the national logo may be certified by PGS from Chile, Mexico, Bolivia, Paraguay, Peru, and the Dominican Republic and Brazil. In Argentina, Panama and Costa Rica, although these last two types of certification described above are not contemplated, there are specific alternative systems that meet some characteristics of collective certification systems, but always maximum a national scope.

The results of these three alternative certification systems in relation to the classic third-party audit system in the hands of private certifiers, which constitute Public Certification (PC), Internal Control Systems (ICS) and Participatory Guarantee Systems (PGS), are summarized in the following table:

	Alternative certification system	Maximum scope	Possibility of using the logo	
Argentina	PC	X (non-operational)	International	X
	ICS	-	-	-
	PGS	-	-	-
	Other	Organized group of producers	National	X
Bolivia	PC	X (non-operational)	International	X
	ICS	X	International	X
	PGS	X	National	X
	Other	-	-	-
Brazil	PC	-	-	-
	ICS	-	-	-
	PGS	X	National (*)	X
	Other	-	-	-
Chile	PC	X (non-operational)	International	X
	ICS	X	National	X
	PGS	X	National (*)	X
	Other	-	-	-
Colombia	PC	X (operational)	International	X
	ICS	X	National	-
	PGS	-	-	-
	Other	-	-	-
Costa Rica	PC	-	-	-
	ICS	-	-	-
	PGS	X	National	-
	Other	Participatory certification system	National	-
Ecuador	PC	-	-	-
	ICS	X	National	X
	PGS	X	National	-
	Other	-	-	-
El Salvador	PC	X	International	-

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	ICS	X	International	-
	PGS	-	-	-
	Other	-	-	-
U.S.	PC	X (operational)	International	X
	ICS	X	International	X
	PGS	-	-	-
	Other	-	-	-
Honduras	PC	-	-	-
	ICS	X	National	-
	PGS	-	-	-
	Other	-	-	-
Mexico	PC	X (non-operational)	International	X
	ICS	X	International	X
	PGS	X	National	X
	Other	-	-	-
Nicaragua	PC	X (non-operational)	National	X
	ICS	X	National	X
	PGS	-	-	-
	Other	-	-	-
Panama	PC	X (operational)	International	X
	ICS	X	National	X
	PGS	-	-	-
	Other	Group certification	National	X
Paraguay	PC	X (non-operational)	International	X
	ICS	-	-	-
	PGS	X	National	X
	Other	-	-	-
Peru	PC	-	-	-
	ICS	X	International	X
	PGS	X	Local	X
	Other	-	-	-
Dominican Republic	PC	X (operational)	International	X
	ICS	X	International	X
	PGS	X	National	X
	Other	-	-	-

(*) It would also be international due to the agreement between Chile and Brazil.

As for the **possibility of presenting complaints** due to non-compliance with regulations, in all countries consumers have the opportunity to do so, and all NCS have mechanisms to follow up with a subsequent investigation, except in Costa Rica, El Salvador and Colombia. Likewise, in all countries the NCS have the authority to comply and execute sanctions and fines.

In regards to the **intervention in the sales of a infringing product**, with the exception of Ecuador and the U.S., all countries have the authority to carry it out, while the monitoring of waste and pollutants is carried out in Ecuador, Argentina, Paraguay, USA, Mexico, El Salvador, Chile, Panama, the Dominican Republic and Brazil.

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Moving on to the trade topic of **agreements and equivalences with other countries or blocks**, the following table summarizes these relationships, only for the countries that have them, it also details whether they are of bilateral or unilateral, partial or total reciprocity agreements:

ICOA Member/Country Agreement	EU	U.S.	Canada	Switzerland	Japan	China	Korea	Brazil	Chile
Argentina	X Unilateral Partial	-	-	X Unilateral Partial	X Unilateral Partial	-	-	-	-
Brazil	-	-	-	-	-	-	-	-	X Bilateral Partial
Costa Rica	X Unilateral Partial	-	X Bilateral Partial	X Unilateral Partial	-	-	-	-	-
Chile	X Bilateral Partial	-	-	X Bilateral Partial	-	-	-	X Bilateral Partial	-
U.S.	X Bilateral Total	-	X Bilateral Total	X Bilateral Total	X Bilateral Partial	-	X Bilateral Partial	-	-

Moving on to the topic of **ongoing negotiations**, except for Costa Rica, El Salvador, Panama and Brazil, the other countries claim to be in the process of negotiating equivalence or harmonization agreements for organic products with other countries or blocks.

	EU	U.S.	Canada	Central America	Japan	China	Taiwan	Korea	Qatar	New Zealand	Mexico	Great Britain	Switzerland	Brazil
Ecuador	X	X	-	-	-	-	-	-	-	-	-	-	-	-
Peru	X	X	-	-	-	-	-	-	-	-	-	-	-	-
Argentina	-	X	-	-	-	-	-	-	-	-	-	-	-	-
Paraguay	X	-	-	-	-	-	X	-	-	-	-	-	-	-
Bolivia	X	-	-	-	-	-	-	-	-	-	-	-	-	-
U.S. (*)	-	-	-	-	X	-	X	-	-	-	X	X	-	-
Nicaragua	-	-	-	X	-	-	-	-	-	-	-	-	-	-
Mexico	X	X	X	-	X (**)	X	-	-	-	-	-	-	-	-
Honduras	-	-	-	X	-	-	-	-	-	-	-	-	-	-
Colombia	X	-	-	-	-	-	-	-	-	-	-	-	-	-
Chile	-	X	-	-	-	-	X	X	-	-	-	-	-	-
Dominican Republic	X	X	-	-	-	-	-	-	-	-	-	-	-	-

(*) Proposed with Argentina and Chile. (**) In negotiation process with Japan.

To finalize and add to these last two tables, which summarize highly relevant information, a series of explanatory paragraphs from some countries are set out below regarding the scope and implications, requirements or particularities of such current or on-going recognitions or agreements.

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Argentina has recognition by the EU for primary plant and animal products, as well as its processed products, provided they are produced in its territory. Mutual recognition is also in process, as well as wine and aquaculture production. There is also recognition from Switzerland and Japan, and both are in the process of mutual recognition.

Brazil has mutual recognition of the certification of organic products with Chile for primary plant production as well as its processed products. A common labeling will be established between the two countries attesting to the authenticity of the products. The products that will be marketed from Brazil and from Chile are in the definition phase, the interest is focused in wine and fruit products. A very important advantage of this agreement is that both countries recognize the certification by the PGS of the organic quality practiced in Chile and Brazil.

Chile has an Equivalence Agreement with the European Union on trade in organic/ecological products, effective since January 1, 2018, which includes fresh and processed vegetables, wines, seeds, propagation materials and honey, produced in Chile or in the EU. It also has a Mutual Recognition Agreement with Switzerland for Organic Products, effective since August 1, 2019 that applies to the same categories agreed with the EU. Finally, there is the Equivalence Agreement between Chile and Brazil, which entered into force on May 1, 2019, in which both countries recognize their certification systems, including self-certification or first-party certification systems carried out through Ecological Farmer Organizations (EFO) and where the scope of the agreement covers fresh and processed plant-based products, including organic wines.

Colombia is currently continuing to complete equivalence agreements with Japan and the European Union. With Japan, pending information regarding allowed inputs and ingredients in processed foods is being reviewed, and with the European Union the updated regulations from Colombia were sent (Resolution 199 of 2016).

The U.S. has equivalence with Canada, the European Union, Japan, Korea, Switzerland, and has completed negotiations with the United Kingdom in anticipation of *Brexit*. Furthermore, it is in the process of negotiating with Mexico, Taiwan and Japan to expand and cover the demand for livestock products. Argentina, Chile and Costa Rica submitted equivalence requests, all of them bilateral.

Mexico. Currently the Mexican Government dynamically manages equivalences of its Organic Product Control System (CS) with the Competent Authorities of five countries. The greatest progress have been made with the U.S., having reached the bilateral terms and scope for the Equivalence Agreement for the Control System. Mexico-Canada: side-by-side evaluations of regulation and on-site evaluations have concluded, and are in the process of establishing negotiating groups on the terms and scope of the Agreement. Finally, with the European Union, bilateral evaluations of the regulation and operation of the Control Systems have been carried out to continue with the management of this process.

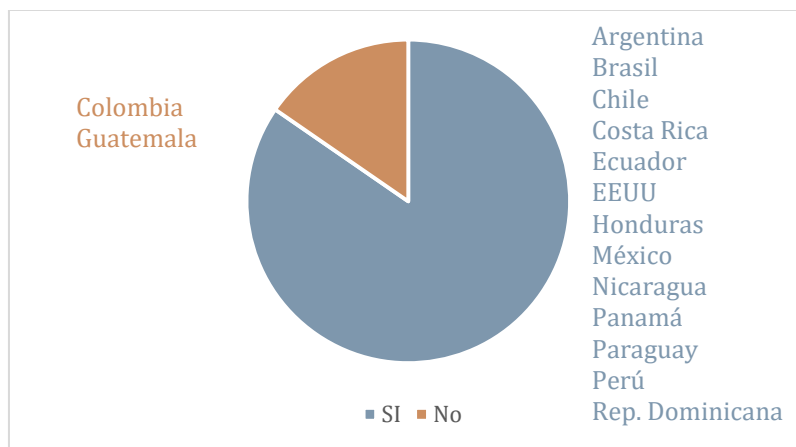
Peru. Currently the Peruvian Government is managing the approval of the Regulation for the Certification and Inspection of Organic Production, a standard that seeks the equivalence of its Control System for Organic Products with the Competent Authorities of the U.S. and the European Union. In the first case, in 2012 the negotiations with the NOP began and did not prosper, taking up the issue again in 2019. In the second case,

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in 2006 efforts were made for Peru to be considered as a Third Country, however, this request did not prosper, to date there was a first meeting with the EU authorities in Peru and the this process continues.

2.2.2 DEVELOPMENT AND PROMOTION INSTRUMENTS

Regarding the development of Organic Agriculture, 80% of the countries indicated that they have some form of promotion.



The official institution responsible for developing Organic Agriculture in each country is detailed below:

Country	Government institution responsible for development
Argentina	Ministry of Government of Agroindustry.
Brazil	Ministry of Agriculture, Livestock and Supply.
Chile	Office of Agricultural Studies and Policies (ODEPA), Ministry of Agriculture.
Costa Rica	Ministry of Agriculture and Livestock.
Ecuador	Ministry of Agriculture and Livestock.
U.S.	United States Department of Agriculture (USDA).
Honduras	Ministry of Agriculture and Livestock / SENASA.
Mexico	Ministry of Agriculture and Rural Development, Fisheries and Food (SADER).
Nicaragua	Ministry of Agriculture and Livestock (MAG).
Panama	Ministry of Agricultural Development - Agriculture Directorate.
Paraguay	Technical Committee for the Development of Organic Production and Agroecology.
Peru	Ministry of Agriculture - General Agricultural Directorate.
Dominican Rep.	Ministry of Agriculture, Organic Agriculture Department.

On the other hand, the following countries have national legislation for the promotion and development of Organic Agriculture:

Country	Legal instrument for development
Argentina	Organic Production Development project (pending) with tax advantages and a development fund. Added Value Project with subsidies for promotion. Refund to exports.
Brazil	Decree No. 7,794 National Policy on Agroecology and Organic Production (PNAPO) and the National Plan for Agroecology and Organic Production (PLANAPO).

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Costa Rica	Law N ° 8591 Law for the Development, Promotion and Fostering of Organic Agricultural Activity.
Ecuador	Ministerial Agreement No. 299, Ministerial Agreement No. 024.
Nicaragua	Law 765. Law for the Promotion of Agroecological or Organic Production.
Mexico	Organic Products Law of 2006 and its Regulations of 2010.
Paraguay	Law No. 3481 - Promotion and Control of Organic Production.
Peru	Law No. 29196.- Law for the Promotion and Development of Organic or Ecological Production.

Except Colombia and Nicaragua, the other countries have Commissions or Committees (mainly), Councils or Boards (Public-Private) that promote Organic Agriculture. Most of the coordination of these entities is under the responsibility of the National Ministries of Agriculture. The U.S. has a National Organic Standards Board (NOSB), but it is a government advisory board that only makes recommendations for standards (control) and does not work in development. The following table summarizes this data:

	Authority	Coordination	Year of creation
Argentina	Commission	Ministry of Agroindustry of the Nation.	1999
Brazil	Commission	Organic Production Commission (CPOrg) - coordinated by Civil Society.	2007
	Commission	Thematic Subcommittee on Organic Production (STPOrg) - coordinated by the Ministry of Agriculture, Livestock and Supply	2012
Chile	Commission	Office of Agricultural Studies and Policies (ODEPA).	2004
Costa Rica	Commission	Ministry of Agriculture and Livestock.	1999
Ecuador	Board	Ministry of Agriculture and Livestock.	2017
Guatemala	Commission	National Commission for Ecological Agriculture.	1999
Honduras	Committee	Ministry of Agriculture and Livestock / SENASA.	2011
Mexico	Council	National Council for Organic Production.	2007
Panama	Committee	Ministry of Agricultural Development.	2015
Paraguay	Committee	Ministry of Agriculture and Livestock.	2010
Peru	Council	Ministry of Agriculture - General Agricultural Directorate.	2013
Dominican Republic	Council	Ministry of Agriculture.	2008

All countries have private institutions (such as Chambers, NGOs, Foundations, Associations, Producers' Organization, etc.) that promote Organic Agriculture, which are described below:

Private development institutions	
Argentina	Chamber of Certifiers (CACER) - Argentine Movement for Organic Production (MAPO).
Brazil	There is no organized official data.
Chile	NGO-Center for Studies and Technology (CET); Associations and organizations of organic producers; Federation of Agroecology and Responsible Consumption of Chile (FEDAECHE); Fairs and businesses selling organic products.
Colombia	Colombian Organic Producer Federation
Costa Rica	Organic Agriculture Movement Association; Producer organizations.
Ecuador	VECO Andino (Belgian NGO), GIZ.
U.S.	Organic Trade Association (OTA), National Sustainable Agriculture Coalition (NSAC), The Organic Center, and NGOs in many of the 50 States that carry out promotional, technical and economic assistance activities, etc.
El Salvador	MAOES Organic Agriculture Movement (https://maoes.org/).
Guatemala	GIZ, ANACAFÉ, FECCEG, CORO, FEDECOCAGUA, AMPROSERGUA, UTZ.

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Honduras	Associations of producers and agricultural boards.
Nicaragua	Movement of producers of Agroecological and Organic production of Nicaragua (MAONIC).
Mexico	Impulso Orgánico Mexicano, Mexican Society for Organic Production. Producer and industry organizations.
Panama	Panamanian Association of Organic Agriculture (APAO).
Paraguay	Paraguayan Chamber of Organic and Agroecological Production (CPROA); Organic Paraguayan Association; Association of Organic Producers (APRO).
Peru	Agroecological Consortium of Peru, National Board of Organic Banana, National Coffee Board (JNC), National Association of Cacao Producers (APPCACAO).
Dominican Republic	CONACADO, BANELINO, CONACADO, COOPPROBATA, APROBANO, JAD Organic Committee, Organic Cluster, BANAMIEL, Northern Plantations, FEDECARE, FECADESJ.

The stakeholders in the organic sector are organized in all countries, through various types of organizations, including Cooperatives, Associations, Movements, guild associations, producer groups, organizations, chambers and networks. Finally, it can be concluded that in all countries, except for Panama and Colombia, the Nation States have developed concrete actions to support operators (be they producers, processors and/or marketers) of organic products. The actions detailed below, indicate the ones of greater relevance:

- Training.
- Technical assistance and advice.
- Assistance for studies, technical tours, fairs, exhibitions, etc.
- Inspection services provided by the State.
- Information campaigns and promotion of the productive system.
- Support for research projects.
- Exports assistance.
- Support for capacity building and institutional structures.
- Full or partial coverage of the cost of certification.
- Provision of sector-specific information.
- Financing.
- Consumer promotion campaigns.
- Public education.
- Conversion payments.
- Tax incentives.
- Payments for the recognition of environmental benefits.

Regarding the existence of **Development Plans**, the Dominican Republic, Peru, Mexico and Brazil indicated that they have plans being implemented, while in Argentina their implementation is partial. Paraguay has a plan but it is not being implemented.

In addition, the **limitations and/or issues** identified that prevent the development of Organic Production in each country is detailed below:

BRAZIL. TRAINING AND EDUCATION OF PROFESSIONALS; SUPPLY OF INPUTS APPROPRIATE TO ORGANIC PRODUCTION AND INVESTMENT IN RESEARCH FOR THE SECTOR.

Ecuador. Absence of a unit that develops Organic Production in Ecuador.

U.S. Transition period required. Maintain soil fertility in large-scale production and find economic crop rotation systems.

El Salvador. Lack of a government agency to develop Organic Production.

Chile. Specific and applied research, training, information and dissemination.

Paraguay. More government interest and research to help improve development is lacking.

Mexico. Geographical, cultural, socio-economic, dissemination, commercialization and value chain limitations.

Nicaragua. Cost of the certification process, the requirements of national and international organic production standards and international prices.

Argentina. Aid to producers during the conversion period, assistance producer organizations on supply and marketing issues, and technical assistance is lacking.

Peru. Agrarian policy for development, providing more personnel and a budget for operational activities at the national and sub-national levels in the regions.

Dominican Republic. Lack of public policies.

Panama. Financial resources and promotion, in addition to trained personnel; lack of interest and government support. Lack of local markets in strategic places.

2.2.3 DEVELOPMENT INSTRUMENTS

Regarding research, science and technology to contribute to the development of Organic Agriculture, all countries except Guatemala and Nicaragua have lines of research. The following table summarizes the data collected:

Country	Research, science and technical institutions
Argentina	National Institute of Agricultural Technology (INTA), National Institute of Industrial Technology (INTI), Ministry of Science and Technology (MinCyT), Department of Agronomy of the University of Buenos Aires (FAUBA), National University of La Plata and other national universities.
Brazil	Public institutions of the federal Professional, Scientific and Technological Education network; Brazilian Agricultural Research Company (EMBRAPA); Ministry of Agriculture, Livestock and Supply; Ministry of Science and Technology; Ministry of the Environment; Ministry of Education.
Chile	Institute of Agricultural Research (INIA), Public and private universities, Foundation for Agrarian Innovation (FIA), Institute of Agricultural Development (INDAP), Corporation for the Development of Production (CORFO).
Colombia	National University of Colombia, University Corporation of Santa Rosa de Cabal –UNISARC, Technological University of Pereira, University of Córdoba, University of Nariño, University of Quindío, University del Valle, University of Cauca, University Corporation Minuto de Dios, University of the Amazon, Jorge Tadeo Lozano University, International Center for Tropical Agriculture –CIAT, Corpoica.
Costa Rica	University of Costa Rica, National Institute of Innovation and Transfer of Agricultural Technology, INA National Center Specialized in Organic Agriculture "La Chinchilla", EARTH University, CATIE.
Ecuador	The National Autonomous Institute of Agricultural Research INIAP.
U.S.	USDA Economic Research Service (ERS), USDA National Agricultural Statistics Service (NASS), USDA Agricultural Research Service (ARS), Universities, NGOs, The Organic Center, Sustainable Agriculture Research Program (SARE), Organic Farming Research Foundation (OFRF) and the Rodale Institute.
El Salvador	University of El Salvador (UES).
Honduras	Universities, UNAH, CURLA, UNA, Zamorano.
Mexico	Postgraduate College, South Boarder College, Autonomous University of Chapingo. Autonomous University of Chiapas, National Polytechnic Institute.
Nicaragua	Nicaraguan Institute of Agricultural Technologies (INTA). National Agrarian University (UNA).
Panama	Institute of Agricultural Research of Panama (IDIAP).
Paraguay	Department of Agrarian Sciences, National University of Asunción; Paraguayan Institute of

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	Agricultural Technology.
Peru	Institute of Agrarian Innovation (INIA), La Molina National Agrarian University, Huayuna Institute.
Dominican Republic	National Council for Agricultural and Forestry Research (CONIAF), Dominican Institute for Agricultural and Forestry Research (IDIAF), Center for Agricultural and Forest Development (CEDAF), Universities.

As for the educational Institutions that contribute to the training of technical-professional human resources for the development of Organic Agriculture, they are present in most countries and are summarized in the following table:

Country	Educational institutions
Argentina	Department of Agronomy of the University of Buenos Aires (FAUBA), National University of Catamarca.
Brazil	Public institutions of the federal network of Professional, Scientific and Technological Education.
Chile	Environmental Technical Training Center (IDMA), Center for Studies and Technology (CET), University of Chile, Pontifical Catholic University of Chile (PUC), University of Santiago de Chile (USACH), Agricultural Colleges, National Training Institute (INACAP), Technological University of Chile INACAP, INACAP Professional Institute, INACAP Technical Training Center.
Colombia	National University of Colombia (Medellín and Bogotá offices), University Corporation of Santa Rosa de Cabal - UNISARC, University of the Amazon - UniAmazonía, National Learning Service-SENA, University del Valle in Cali (Valle del Cauca).
Costa Rica	University of Costa Rica, CATIE, National University, EARTH, INA National Center specialized in Organic Agriculture "La Chinchilla".
Ecuador	Catholic University of Santiago de Guayaquil, Polytechnic University, Salesian, Central University of Ecuador, University of the Armed Forces-ESPE, Higher Polytechnic School of Chimborazo.
U.S.	Universities.
El Salvador	University of El Salvador (UES).
Guatemala	Universities, Schools.
Honduras	Universities, UNAH, CURLA, UNA, Zamorano.
Mexico	Postgraduate College, South Boarder College, Autonomous University of Chapingo, National Autonomous University of Mexico
Nicaragua	Nicaraguan Institute of Agricultural Technologies (INTA). National Agrarian University (UNA).
Panama	University of Panama, National Institute of Agriculture (National School of Agriculture, agricultural colleges, OTEIMA University and the National Institute of Professional Training for Human Development (INADEH).
Paraguay	CECTEC; ALTER VIDA, San Francisco Agricultural School, San Isidro Labrador School.
Peru	La Molina National Agrarian University, San Antonio Abad University of Cusco, San Agustín University of Arequipa.
Dominican Republic	Autonomous University of Santo Domingo (UASC), ISA University. Cibao Catholic Technological University (UCATECI). Dominican Evangelical University (UNEV). Agricultural Training Schools.

2.2.4 INTERNATIONAL COOPERATION INSTRUMENTS

All countries participate in international bodies related to Organic Agriculture, such as the Inter-American Commission on Organic Agriculture (ICOA), fairs such as Biofach, REAF, FIBL, Technical Cooperation with Korea, CATIE, Spanish Agency for International Development Cooperation (AECID), among others.

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International technical and/or financial cooperation strategies have been developed to work on the development and promotion of Organic Agriculture in countries such as Argentina, Guatemala, Ecuador, Panama, Costa Rica, Chile, Mexico, Paraguay, Colombia and the Dominican Republic. Details are added below in the following table:

Country	International cooperation instruments and strategies
Argentina	FOAR South South project with the Philippines.
Brazil	There is no organized official data.
Chile	Chile-Switzerland cooperation project on Organic Agriculture Chile - FAO Organic Agriculture Project.
Colombia	There are initiatives and memoranda of understanding that include the topic of organic production, but to date no actions have been taken.
Costa Rica	IFOAM, FIBL Institute.
Ecuador	Food and Agriculture Organization of the United Nations (FAO), GIZ.
U.S.	Universities.
Guatemala	GIZ, Adaptate Program.
Honduras	IICA, HERBETAS, VECOMA.
Nicaragua	IICA.
Mexico	Research projects and international events on Organic Livestock in coordination with the National Autonomous University of Mexico.
Panama	Agriculture Strengthening Projects with a territorial approach, (Spanish Cooperation), Korean Cooperation (KoLFACI), Technical Cooperation Agreement with Cuba.
Paraguay	ICCO - Strengthening of organizations and the foreign market (export of organic products), IICA - Seminars, exchanges and research. Inter-american Foundation - Strengthening of organizations and technology transfer.
Peru	European Union (Euro Eco Trade Program for the promotion of exports of organic products (banana, mango, chestnut, quinoa), Swiss Cooperation, GEF Fund.
Dominican Republic	PIP-COLEACP of the EEC-institutional development and regulations, IICA-Strengthening of organizations and promotion, Japanese Cooperation-capacity development, Inter-American Foundation-Training of groups to promote Organic Agriculture USAID-USDA-Identification of public policy proposals in Organic Agriculture, FAO-Capacity development.

2.2.5 STATISTICS OF THE ORGANIC SECTOR

Finally, regarding the existence of sector-based statistics, all countries have official information on Organic Agriculture. This information covers: operators, certified organic area, production, sales (local/national), exports, imports, among others, which are produced annually and/or monthly:

Country	Scope	Institution in charge
Argentina	Operators, certified organic area, production, sales (local/national), exports, imports.	SENASA.
Brazil	Operators, certified organic area, No. of producers, producing areas.	Ministry of Agriculture, Livestock and Supply.
Chile	Operators, certified organic area, exports, imports.	Agricultural and Livestock Service (SAG) - National Customs Service.
Colombia	Operators, certified organic area, production, sales (local/national).	Ministry of Agriculture and Rural Development.
Costa Rica	Operators, certified organic area, production, exports.	Accreditation and Registry of Organic Agriculture Office.
Ecuador	Operators, certified organic area, production, exports.	AgroCalidad

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U.S.	Operators, certified organic area, production, exports, imports, prices, market.	USDA National Agricultural Statistics Service, USDA Foreign Agricultural Service.
El Salvador	Certified organic area, production, exports.	No data.
Guatemala	Operators, certified organic area, production, exports, imports.	Department of Organic Agriculture - DAO.
Honduras	Operators, certified organic area, production, sales (local/national), exports, imports.	Department of Organic Agriculture - DAO SENASA.
Nicaragua	Operators, certified organic area, production and exports.	Institute of Protection and Agricultural and Livestock Health (IPSA).
Mexico	Operators, certified organic area, production, sales (local/national), exports, imports.	Agri-Food and Fisheries Information Service (SIAP) and SENASICA.
Panama	Operators, certified organic area, production.	Ministry of Agricultural Development (Agriculture and Plant Health Offices)
Paraguay	Operators, certified organic area, production, sales (local/national), exports.	SENAVE (National Service for Plant and Seed Quality and Health).
Peru	Operators, certified and in-transition organic area, No. of producers, producing areas.	SENASA.
Dominican Republic	Operators, certified organic area, production, exports.	Ministry of Agriculture.

As a summary, it can be concluded that in general, the countries of the region have developed Organic Production working on commercial opportunities in the international market. However, efforts to promote and develop domestic markets are more recent, thus the results have not yet registered a high impact. This requires active policies that include awareness raising, training of producers and consumers, as well as the development of new market strategies for organic products at the domestic level. All this is integrated and framed in this Plan.

3. Future Scenario

Organic Production is increasingly consolidated worldwide, highlighting the importance of the consumption of this type of product by the millennial generation, who show great interest in knowing the origin of food and ensuring that it was obtained without generating negative impacts on the environment.

This reality, which represents a new production and consumption paradigm, energizes a global market for organic products currently expanding and under sustained growth, reaching almost US\$ 100 billion. Although the trend is positive, the challenges for the sector will continue, such as diversifying, improving the quality of supply, and expanding the demand (currently 90% of world sales are registered in the U.S. and Europe).

In the U.S., in 2016 the movement in retail sales was US \$ 50 billion, with an annual growth of 13%. More than 75% of Supermarkets offer organic food. While in Europe this market also grows, exceeding 10% year-on-year. The European organic market that registers a significant expansion is Spain, where in 2016 domestic consumption increased by 12.5%, accompanied by an increase in exports and imports. This country has exceeded 2 million hectares dedicated to Organic Agriculture, which translates into production volumes that exceed 1.7 billion Euros and involves more than 80 thousand jobs. It should be noted that the industrial sector for the processing of organic products has shown an increase of 9%.

In LAC countries, in recent years Organic Production has grown at a constant rate. In general, a growth of no less than 15% per year is estimated, as a result of the demand of the world market, and due to a large number of entrepreneurs who bet on this differentiated system, which adds value to agro-industrial production. In specific countries such as Mexico, the commercialization channels are diversified for products of national and imported origin towards the vegan, vegetarian, direct-to-chef, hipster, specialty stores, open-air market (*tianguis*) and local organic markets, pharmacies, online sales and sales in self-service stores expands in major cities. The National Logo for Organic Products of Mexico is already in these sectors.

On the other hand, it is important to highlight that in Southeast Asia, China, India and the Middle East, the growth of the market and imports of organic products has been exponential in recent years, which represents a unique opportunity for the region, beyond local and intra-regional markets that are also gaining prominence and should not be neglected.

In Brazil there is a strong internal demand for organic products that grows at 20% annually, although there is currently no direct financial contribution from the government, this growth reflects a response of the sector to the needs of the domestic market. Public policies - PNAPO and PLANAPO - have been reducing the budget for initiatives to encourage the development of Organic Production. Likewise, an initiative of the National Bio-inputs Program in Brazil is being built, where it is expected that one of the main challenges of the productive sector, which is the development of technologies and inputs for Organic Production, can be addressed.

4. Vision, Mission, Strategic Objectives, Indicators and Goals

Based on the current situation of Organic Production in the ICOA countries and the envisioned future scenario, ICOA has been able to agree on a Vision, Mission, Strategic Objectives, Indicators and Goals, to promote the development of Organic Agriculture.

Additionally, for each Strategic Objective, a series of achievement Indicators are specified, for which Goals are to be achieved by 2030 and a baseline is set for the year 2019. These Indicators will allow the monitoring and follow-up of the execution of the Plan, once the actions to be carried out for its execution are established.

Vision

By 2030, organic agriculture in the ICOA member countries achieves a greater growth in the production and trade of organic products, favorably impacting the countries' economies and the environment; as well as in the positioning of the ICOA as a world benchmark body in Organic Agriculture.

Mission

As ICOA, being a technical platform for the joint development of countries, where the institutional framework of Organic Agriculture is strengthened through its Development and Control Authorities, it contributes to the strengthening of the National Control Systems, the harmonization of standards, trade between countries, and the promotion and positioning of this differentiated productive system that positively impacts the environment, biological diversity, consumer and worker health, which gives added value to primary and industrial production and contributes to the foundations of the population, territorial development and local markets, guaranteeing food security and sovereignty.

2030 Strategic objectives, Achievement Indicators and Goals

The Strategic Objectives of the Plan that are detailed below, underlie the objectives of the creation of the ICOA. In order to facilitate trade and the development of markets for organic products, strengthen National Control Systems, information and knowledge management, promote Organic Agriculture, and strengthen the ICOA, the following 8 Strategic Objectives have been determined:

To:

1. Stimulate research, development, dissemination, transfer and adoption of technological innovations aimed at Organic Production.
2. Promote fiscal, commercial, financial and competition instruments for Organic Production, that are equitable from the social sphere perspective, and encouraging for private investments.
3. Promote organizational forms (primary and industrial), such as productive networks for value chains, clusters, consortiums, cooperatives, foundations, among others, that allow the development of the organic sector in the region.
4. Strengthen the presence of Organic Production in national, regional and international institutional settings.

5. Increase the number of producers and processors of organic products. More production with more producers.
6. Increase the volume, destinations and share of organic products exported from the countries of the region, especially those with the highest added value.
7. Increase the volume and share of organic products in the national market of each member country, with strategies to promote local consumption.
8. Foster the development and availability of inputs necessary for Organic Production.

A series of possible Achievement Indicators for each of the Objectives is listed below:

- 1. Stimulate research, development, dissemination, transfer and adoption of technological innovations aimed at Organic Production.**
 - Indicator 1.1: Number of organic-based Demonstration Units implemented in the region (in Research Centers, Universities, provincial and/or municipal or communal belonging to the State, etc.).
 - Indicator 1.2: Number of exclusive annual international organic production congresses organized in the region and focused on research.
 - Indicator 1.3: Number of technologies generated, validated and transferred for direct use in Organic Production.

- 2. Promote fiscal, commercial, financial and competition instruments for organic products, that are equitable from the social sphere perspective, and encouraging for private investments.**
 - Indicator 2.1: Number of fiscal, commercial, financial and competition instruments for organic products existing in the region.

- 3. Promote organizational forms (primary and industrial), such as productive networks for value chains, clusters, consortiums, cooperatives, among others, that allow the development of the organic sector in the region.**
 - Indicator 3.1: Number of organizational forms (primary and industrial), which jointly produce, prepare/process and/or market organic products in the region, be they productive networks by value chain, PGS, cluster, consortiums, cooperatives, union associations, foundations, etc.

- 4. Strengthen the presence of Organic Production in national, regional and international institutional settings.**
 - Indicator 4.1: Number of Development and Control Departments in the countries of the region with sufficient institutional support.
 - Indicator 4.2: Number of university degrees, university technical studies and specific postgraduate degrees in Organic Production (or Agroecology for the countries that integrate this subject to their regulation) in the region.
 - Indicator 4.3: Number of associations or NGOs, movements or chambers that represent the organic sector in national authorities of the countries of the region.

- Indicator 4.4: Existence of an observatory of future demand/supply scenarios for organic products of the ICOA.
- Indicator 4.5: Number of equivalences, recognitions and/or agreements in force between intra or extra ICOA regional countries.

5. Increase the number of producers and processors/processors of organic products. More production with more producers.

- Indicator 5.1: Total production of the organic sector in the region (tons).
- Indicator 5.2: Total area under organic monitoring in the region (hectares).
- Indicator 5.3: Total area under livestock monitoring in the region (hectares).
- Indicator 5.4: Total agricultural area under organic monitoring in the region (hectares).
- Indicator 5.5: Total livestock area (bovine, ovine, caprinae, pork, camelids, poultry) under organic monitoring (hectares) in the region.
- Indicator 5.6: Number of heads of different organic animal productions in the region (ovine, caprinae, beef bovine, dairy bovine, pork, poultry, camelids).
- Indicator 5.7: Amount of organic hives in the region.
- Indicator 5.8: Number of organic operators (primary producers, processors and marketers) in the region.
- Indicator 5.9: Number of organic producers/processors in the region.

6. Increase the volume, destinations and share of organic products exported from the countries of the region, especially those with the highest added value.

- Indicator 6.1: Total exports of the organic sector (estimated or actual) of the region (tons).
- Indicator 6.2: Total exports of processed products of the organic sector (estimated or actual) of the region (tons).
- Indicator 6.3: Number of export destinations (countries) in the region (estimated or actual).
- Indicator 6.4: Total volume of organic products exported from the region/total volume of food and beverages exported from the region (estimated or actual).
- Indicator 6.5: Number of different organic products exported from the region (estimated or real).

7. Increase the volume and share of organic products in the national market of each member country, with strategies to promote local consumption.

- Indicator 7.1: Quantity of tons of organic products sold to the national domestic market.
- Indicator 7.2: Number of organic products sold to the national domestic market.
- Indicator 7.3: Number of current educational and awareness campaigns about the importance of the consumption of organic products in the region.
- Indicator 7.4: Number of projects, programs, institutions, companies that consider the public procurement of organic products.
- Indicator 7.5: Number of fairs and exhibitions (permanent or seasonal) exclusive for Organic Production in the region.

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- Indicator 7.6: Annual consumption per inhabitant of organic products in the region (kg/inhabitant per year).

8. Foster the development and availability of inputs necessary for Organic Production.

- Indicator 8.1: Number of countries that have official lists of commercial inputs suitable for Organic Production or Records of Bio-inputs/inputs suitable for Organic Production in the region.
- Indicator 8.2: Amount of commercial inputs registered by the competent authority and considered suitable for Organic Production in official listings or registers in the region.

Thus, during the XI ICOA General Assembly held in Santo Domingo (Dominican Republic) in August 2019, priority was given to **the following indicators of achievement** due to their practicality in obtaining the data, integration capacity and aim to produce an impact or concrete results for the achievement of the Objectives of the Plan. In the next General Assembly, the corresponding 2020 Base Line and 2030 Goal 2030 will be defined for each one.

Prioritized Achievement Indicators
1. Number of Development and Control Departments in the countries of the region with sufficient institutional support.
2. Number of equivalences, recognitions and/or agreements in force between existing intra or extra regional countries.
3. Total area (hectares) under organic monitoring in the region. The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
4. Total livestock (bovine, ovine, caprinae, pork, camelids, poultry) area (hectares) under organic monitoring in the region. The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
5. Total agricultural area under organic monitoring in the region (hectares). The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
6. Amount of organic hives in the region. The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
7. Number of organic operators (primary producers, processors and marketers) in the region. The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
8. Number of organic producers/processors in the region. The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
9. Consolidation of the organization of producer groups and other associative forms (primary and industrial) of the organic sector.
10. Total exports of organic products in the region (tons). The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
11. Annual consumption per inhabitant of organic products in the region (kg/inhabitant per year). The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.
12. Amount of commercial inputs registered by the competent authority and considered suitable for Organic Production in official listings or registers in the region. The data of the countries that have contributed to this is taken as a base line, and the Goal will be projected on them.

The monitoring of all these indicators and their resulting data throughout the years will be the methodological guide that will be used to monitor the execution of the plan in the achievement of the objectives and goals that were defined. To this end, a Working Group will undertake the task each year of compiling the results of a survey specially designed to collect such data.

5. Action Plan

As indicated by the *ICOA 2015-2020 Medium Term Plan (MTP)*, at the First Regular Meeting of the ICOA held in San Jose, Costa Rica in November 2009, the Member States defined five policy areas, which were consistent with the objectives proposed by the Ministers of Agriculture of the countries of the Americas, since its creation.

Then at the VII Ordinary General Assembly of the ICOA (Panama, 2014) the 2015-2020 MTP was presented, where three policy areas were defined that arose from the conjugation of the objectives indicated by the Ministers in the ICOA Bylaws, with the mission and vision established in the MTP itself:

- Institutional framework for the development and promotion of Organic Production.
- International, regional and domestic trade of organic products.
- Information and Knowledge Management.

These policy areas have led the ICOA to a clear consolidation process that was reflected in its technical agenda in response to the main issues that affect the activity control structures and the emerging issues that cannot be put aside, as well as in the decision of the Member States to contribute financially with resources that allow the implementation of their annual work plans.

As the first-mentioned document concludes, “what is exposed in this analysis shows the need for the ICOA countries to have policies, or agendas, for the development of the activity, as well as institutional structures that direct their actions and allow the recovery of their growth trends and leverage on the opportunities they offer for the region, and especially for small producers linked to organic activity in the international market for organic products.”

These actions had already been taking place for 10 years with more than significant results, and now is the time to integrate and promote what is referred to as Development, once Control has been strengthened. This Plan channels this turning point in the development of the actions of the ICOA, and frames it so that from this orderly and participatory planning strategy the desired results are obtained with a more efficient use of its capabilities while fulfilling the mandate to contribute effectively to the development of Organic Agriculture in the countries of the Americas and their trade.

In this way, the present Plan seeks to integrate the MTPs that from now on are established and reflected in the ICOA agendas and Annual Work Plans (AWPs).

On the other hand, as a valid background, within the framework of the I Virtual Forum of the member countries of the ICOA “**Structuring of the private sector Organic Production experiences and their coordination with the Public sector**”, that took place on 03/28/2019, a survey was conducted in order to receive feedback and validate the thematic pillars addressed in this Plan, for the

consolidation of upcoming actions and the specific opportunities adjusted to the reality of the member countries.

During the forum, public officials, technicians, producers, specialists from different entities such as: ministries, international organizations, associations, producer cooperatives, foundations, marketers, unions, authorities and secretaries from 11 countries participated. The results obtained made possible the validation of the following prioritized guidelines:

- ✓ Generate spaces for research, development, dissemination, transfer and adoption of technological innovations aimed at Organic Production (incentives for development, standardization of regulations, promotion and dissemination of knowledge among the population, reinforcing public policies regarding development, platforms for regional market integration, and information).
- ✓ Strengthen technical cooperation for knowledge management for the production of inputs and added value (strengthen technical capacities, generate agreements between institutions, enhance the value chain of knowledge).

At the same time, the cooperation instruments that were indicated as priorities to be implemented by the ICOA to respond more adequately to the demands of the countries were, to:

- ✓ Develop cooperation instruments to be implemented in order to respond more adequately to the demands of the countries through strategic programs in: Bioeconomy and Productive Development; Territorial Development and Family Farming; International Trade and Regional Integration; Climate Change, Natural Resources and Risk Management; Animal and Plant Health and Food Safety and Quality.

These prioritized programs are fully aligned with IICA's programs. For this reason, we must integrate actions to achieve synergies.

On the other hand, ICOA has defined 4 Strategic Areas with their possible actions:

- 1) Facilitation of trade of organic products and development of their markets. With the following possible actions:
 - Harmonization of regulations between countries.
 - Prepare regulations on Organic Production topics that are not regulated.
 - Support for countries under the processes of recognition and equivalence of their regulations and control systems with trade partners.
 - Support for countries in the definition of strategies for the development of organic markets with social inclusion of producers and consumers.
- 2) Establishment and strengthening of National Organic Production Control Systems (NCS). With the following possible actions:
 - Development of methodological instruments for strengthening NCS.
 - Prepare proposals for the strengthening of the NCS in the countries and follow-up on their implementation.

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- Support to establishing the institutional framework required for the control of Organic Production in countries where it does not exist.
- 3) Development of Organic Production. With the following possible actions:
- Development of methodological instruments for the promotion of Organic Production.
 - Prepare policy proposals and agendas for the promotion of the activity.
 - Support to establishing the institutional framework required for the development of Organic Production in the countries.
- 4) Information and knowledge management. With the following actions:
- Access to information of interest by the stakeholders of the activity to support and improve decision-making processes.
 - Socialization of relevant information among Organic Production stakeholders.

The ICOA is currently completely validating its Objectives in view of the new 2020 Bylaws. The 4 established objectives are, to:

- a. Contribute to the development, promotion, regulation and control of organic activity in the countries of the Americas and their trade, acting as a technical body for knowledge management and for the socialization and dissemination of relevant and timely information.
- b. Contribute to the strengthening of the institutional structures of the Competent Control and Development Authorities of the organic activity in the countries of the Americas.
- c. Coordinate and promote the development and harmonization of standards and procedures to promote and regulate the production, control, and trade of organic food in the countries of the Americas.
- d. Act as a mechanism for consultation, liaison and reciprocal cooperation between the competent government agencies that promote and regulate the development, promotion and control of organic activity.

If we now link the 4 Objectives set forth in the ICOA's new Bylaws with the 8 Strategic Objectives defined in this Plan, we have the following **relationship chart**:

ICOA Objectives (2020 Bylaws) (horizontal)	a. Contribute to the development, promotion, regulation and control of organic activity in the countries of the Americas and their trade, acting as a technical body for knowledge management and for the socialization and dissemination of relevant and timely information;	b. Contribute to the strengthening of the institutional structures of the Competent Control and Development Authorities of the organic activity in the countries of the Americas;	c. Coordinate and promote the development and harmonization of standards and procedures to promote and regulate the production, control, and trade of organic food in the countries of the Americas;	d. Act as a mechanism for consultation, liaison and reciprocal cooperation between the competent government agencies that promote and regulate the development, promotion and control of organic activity;
Strategic OBJECTIVES (vertical)				
Stimulate research, development, dissemination, transfer and adoption	X			X

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of technological innovations aimed at Organic Production.				
Promote fiscal, commercial, financial and competition instruments for Organic Production, that are equitable from the social sphere perspective, and encouraging for private investments.	X			
Promote organizational forms (primary and industrial), such as productive networks for value chains, clusters, consortiums, cooperatives, among others, that allow the development of the organic sector in the region.				X
Strengthen the presence of Organic Production in national, regional and international institutional settings.		X		
Increase the number of producers and processors/processors of organic products. More production with more producers.	X			
Increase the volume, destinations and share of organic products exported from the countries of the region, especially those with the highest added value.	X		X	
Increase the volume and share of organic products in the national market of each member country, with strategies to promote local consumption.	X		X	
Foster the development and availability of inputs necessary for Organic Production.	X		X	

Finally, in order to follow up on the Objectives and Goals defined in the Plan, we then proceed to align the MTPs that the Commission itself defines every 5 years, establishing the synergy with the IICA MTP of a similar period, to guide the actions from 2020 to 2030.

5.1 2020-2025 MEDIUM TERM PLAN

For this period, the ICOA begins a synergic, binding and complementary work with the IICA MTP, to strengthen the ICOA and progressively achieve the Strategic Objectives of this Plan.

So much so, that for the medium term, a set of Strategic Actions have been determined for each Strategic Objective, which respond to the needs or critical cross-cutting points of the countries that limit the development and control of Organic Production, and which require work in order to boost Organic Agriculture in the ICOA countries.

The Strategic Objectives with their respective Strategic Actions to be addressed in the 2020-2025 period are detailed below:

Strategic Objective 1: Stimulate research, development, dissemination, transfer and adoption of technological innovations aimed at Organic Production.

Strategic Actions:

- Promote innovation and research in Organic Production, linking the ICOA with the research and innovation centers of the region.
- Identify demands for innovation and research in Organic Production and available offers on this area.

- Systematize successful research and innovation experiences in Organic Production.

Strategic Objective 2: Promote fiscal, commercial, financial and competition instruments for Organic Production, that are equitable from the social sphere perspective, and encouraging for private investments.

Strategic Actions:

- Coordinate with the IICA MTP and its programs, aligned with the SDGs to improve technical cooperation, in addition to developing projects seeking financing with external resources.
- Promote national plans for the development of Organic Production promoting the inclusion of a budget to generate economic incentives for the development of this sector.

Strategic Objective 3: Promote organizational forms (primary and industrial), such as productive networks for value chains, clusters, consortiums, cooperatives, among others, that allow the development of the organic sector in the region.

Strategic Actions:

- Identify the promotion actions in Organic Produce organizations in the ICOA countries in order to explain or prioritize best practices that impact the vertical and horizontal integration of the sector.
- Promote alternative certification systems such as: Public Certification, Group Certification (Internal Control Systems) and/or Participatory Guarantee Systems to facilitate the inclusion of small-scale producers.

Strategic Objective 4: Strengthen the presence of Organic Production in national, regional and international institutional settings.

Strategic Actions:

- Systematize statistical information of the region to obtain qualified information from ICOA countries.
- Establish strategies to strengthen organic integrity through the exchange of information on fraud and waste.
- Establish strategies to strengthen organic integrity by improving the ability to perform traceability, ingredient calculations, mass balances, etc.
- Promote the generation and/or strengthening of strategic plans for the development of Organic Agriculture in member countries aligned with this regional plan.
- Design a training plan for Control and Development Authorities.
- Build the capacities of the Development departments through participation in international fairs and events that are considered strategic for this purpose.
- Resume international cooperation activities of the agreements signed with different organizations: OIRSA, FIBL, INTERECO, ECOVALIA, etc.
- Strengthen the Control and Development teams of the countries according to the growth of the producers that is considered in the development plans.

Strategic Objective 5: Increase the number of producers and processors of organic products. More production with more producers.

Strategic Actions:

- Encourage the inclusion of more producers and processors of organic products in the national development plans of Organic Production through training plans at different levels.
- Promote the analysis and subsequent implementation of public organic certification in the ICOA countries as an instrument to promote organic agriculture, focused on domestic trade of organic products from small producers.

Strategic Objective 6: Increase the volume, destinations and share of organic products exported from the countries of the region, especially those with the highest added value.

Strategic Actions:

- Promote the harmonization of national organic production standards among ICOA countries.
- Analyze the changes in the regulatory framework of destination countries or blocks for organic products in the region that are strategic, such as the EU.
- Generate information that facilitates the opening of differentiated tariff items for organic products in the ICOA countries.
- Design the integrated commercial platform "EXPO ORGANIC ICOA".
- Promote the participation of ICOA in fairs and strategic international events to promote the export of organic products.

Strategic Objective 7: Increase the volume and share of organic products in the national market of each member country, with strategies to promote local consumption.

Strategic Actions:

- Design and implement an ICOA Communication Plan to internalize and position the concept of Organic Production with special emphasis on the SDGs as a comprehensive concept, with respect to topics such as Circular Economy, Bioeconomy, Climate Smart Agriculture, Process Technology, Sustainability, GAP/GMP/GAHP, Losses and Waste, Social Attributes (employment, roots, rural development, etc.).

Strategic Objective 8: Foster the development and availability of inputs necessary for Organic Production.

Strategic Actions:

- Unify input preparation and evaluation criteria among ICOA member countries to generate a harmonized list of inputs allowed for Organic Production.
- Increase the availability and quantity of inputs suitable for Organic Production seeking to improve the competitiveness of all stakeholders.

ANNEX I to the 2019-20 ICOA (XL EC/IICA REGULAR MEETING) – 2030 Strategic Plan of the ICOA

5.1.1 2020 Work Agenda

The 2020 Work Agenda, prioritized by the ICOA countries, which contributes to achieving the strategic objectives of this Plan, is detailed in the following table:

Strategic Objective of the Plan	Topic	Responsible	Members/observations	Budget
Strategic Objective 4	Organic integrity (fraud, waste, traceability)	United States	Argentina, Chile, Spain, Mexico,	Not Applicable
Strategic Objective 3	Group Certification Internal Control Systems	Mexico, Peru Spokesperson for Central America	(Countries that answered the questionnaire are included - 7 countries) Honduras and Panama are added.	Not Applicable
Strategic Objective 4	Specific topics OIRSA, FIBL, INTERECO, ECOVALIA	BD Will send matrix to Assembly - member country requests topic of interest	BD/ES/ICOA countries	Not Applicable
Strategic Objective 6	Regulation 848/2018	Ecuador	Communication - Consultations and interpretations	Not Applicable
Strategic Objective 8	State of the art of bio-inputs in Latin America	Brazil		Not Applicable
Strategic Objective 8	Consultancy- ToR- on commercial inputs	Chile	Argentina, Mexico	According to 2018
Strategic Objective 6	Organic Food Iberia June 3 and 4, 2020 / International Congress June 1 and 2	Board of Directors and Executive Secretariat	All ICOA members	
Strategic Objective 3	Analysis of public organic certification in ICOA countries	Board of Directors and Executive Secretariat	Argentina, Bolivia, Guatemala, Honduras, Panama, Paraguay and Peru, Uruguay; with the support of INTERECO	

Contact information

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