



U.S. ORGANIC WORLDWIDE 2016

Annual Report for OTA's International Work



SINCE 1965
Organic
trade association



WE TAKE U.S. ORGANIC GLOBAL Around the world, the desire for traceable, sustainably produced food is growing. Global demand for U.S. organic has never been stronger. Online and in-person, the Organic Trade Association helps connect U.S. businesses with buyers worldwide hungry for bringing the USDA Organic Seal to their markets. Whether you are a large brand or distributor with export programs in place or a small manufacturer just breaking in to global markets, U.S. Organic Worldwide is your go-to resource to help grow your international presence and business.

SUCCESS BY THE NUMBERS

22

Number of OTA-Led International Activities

(representing an additional 9 activities from 2015)



\$48,652,247

Total Projected Sales from Participation in OTA Activities

(up 241% from 2015)



62 U.S. Companies

Participated in OTA Export Promotion Activities

Organic Market Data on

38

International Markets Published on the Global Organic Trade Resource Guide

(with research partner Euromonitor)



Over 230

OTA Organized 1:1 Buyer Meetings at Expo West



1,435

Organic Product Prices from Around the World Catalogued at OTA.com



13 countries for the first time including Austria, Holland and Switzerland



5 New

Organic HS Codes Added to the Harmonized Tariff Schedule, Including an Export Code for Organic Milk

MAP SUCCESS STORIES



Riega Foods, Kansas City, MO, was new to OTA's export promotion activities. First participating in Anuga in 2015 and the Expo West Buyers Mission in 2016. As a result of its participation Riega Foods is now on the shelves in Japan, and is preparing first-time orders for Australia, Spain, and Germany. Riega Foods has its own brand and does custom private label. Riega's founder

Brand Gampper shared, "Export is a growing part of our business, OTA's programs have demonstrated that demand is out there for USDA certified organic, and we are excited to grow our business and support our local economy through these export opportunities."



Excel Trade, headquartered in Seattle, Washington, represents U.S. organic brands in export markets all over the world. Recently Excel Trade participated in OTA's Enjoy Organic promotion in November in Japan. OTA has been working to educate the Japanese consumer on U.S. organic products for the past three years and efforts are starting to pay

off! Nature's Path Love Crunch organic granola range is now in over 3,000 stores in Japan. Sally Cox, Excel Trade's founder and president, shares: "The OTA has done a wonderful job supporting B to B and consumer events in Japan and is definitely making a positive impression with the Japanese consumers that NOP certified products are the best in the world! Thank you, OTA!"

TASC SUCCESS STORY

Developing Partnerships with Leading Organic Institutions Around the World

In 2016, OTA partnered with leading organic institutions around the world to deliver technical seminars and trainings on organic. As Mexico works through implementation of its new organic regulations, OTA delivered in-country trainings on materials review, organic trade tracking, and control systems to Mexican government officials with OTA members OMRI, Driscoll's and the United States International Trade Commission. Partnering with German American Chamber of Commerce Midwest, German Federal Ministry for Economic Affairs and Energy, CROPP Cooperative, and The Organic Center, OTA hosted the Transatlantic Dialogue: Agricultural Perspectives on Organic Agriculture in both the United States and Germany. Participants heard from experts from both regions and had a 7-day study tour through Germany hosting trainings with Bundesministerium für Ernährung und Landwirtschaft, FiBL Germany, IFOAM International, and others. At the request of the Foreign Agricultural Service, OTA also led seminars at the U.S. Embassy in Berlin, the Bavaria Ministry of Agriculture, and the Ambassador Wesner's residence in Vienna, Austria, on the "U.S.-EU Organic Trade: High Standards & Big Opportunities."

2016 YEAR IN REVIEW

BioFach | MAP & TASC |

14 companies participated at BioFach 2016, the world's largest trade show for organic products, resulting in \$9,457,000 in projected sales. OTA spoke on several panels at the BioFach Congress.

Expo West | MAP | OTA organized more than 200+ meetings with buyers from around the world for nearly 30 U.S. organic companies. Projected sales total \$9,035,247.

Taiwan Officials Study Tour | TASC | OTA hosted Taiwanese officials from the Council on Agriculture for a study tour of the U.S. organic industry. Taiwan is the 4th largest market for U.S. organic exports. Taiwan imports more U.S. organic than all of continental Europe, according to USDA tracked HS codes.

Taiwan Trade Mission | MAP | OTA hosted 8 companies in Taiwan for our first-ever trade mission in Taipei. Projected sales as a result of participation were \$7,345,000.

Seoul Hotel and Food | MAP | OTA hosted 8 companies at the Seoul Hotel and Food Show in Korea, the largest food show in the country. Projected sales as a result of participation totaled \$12,310,000.

OTA Policy Conference | TASC | OTA released new market insights at the OTA's policy conference. Ambassador Darci Vetter, Chief Agricultural Negotiator for the U.S. Trade Representative, spoke on the importance of trade and the growing organic market.

Expo Organicos Mexico | TASC | OTA delivered trainings to SAGARPA, SENASICA, and ECONOMIA on at Expo Organicos, Mexico's largest organic industry gathering.

IFOAM Organic Leadership Course | TASC | OTA participated in IFOAM's Organic leadership course in Holland. With country representatives from over 10 countries present, this course cemented the importance of international collaboration in growing the organic movement around the world.

Transatlantic Dialogue Agricultural Perspectives: Organic | TASC | OTA partnered with CROPP and the German American Chamber of commerce to host and deliver technical exchanges both in the U.S. and Germany. 20 U.S. representatives from 10 companies then traveled to Germany for an in-depth exchange.

Technical Seminars: Berlin, Munich, Vienna | TASC | USDA FAS requested OTA lead seminars in Berlin, Munich, and Vienna, on the EU-U.S. organic trade and the existing equivalency arrangement. Both U.S. and EU presenters engaged packed audiences on the topic.

VIVA Canada Digital and Blogger Promo | MAP | 9 U.S. organic brands were featured in an online, print, and social media promotion in partnership with Viva magazine, a premier lifestyle mag in Canada. In addition, OTA hosted a blogger event where key influencers from Toronto tasted product first-hand. Posts from the event generated 1,356,476 Impressions and reached 339,402 Unique Accounts.

East Coast Organic Media Tour | MAP | OTA hosted journalists from Canada, China, France, Germany, Korea, and Japan for taste of the East Coast Organic Industry. Stories highlighting OTA Members and U.S. organic are now being published all over the world.

OTA in Switzerland | TASC | OTA lead the first-ever Switzerland-U.S. organic equivalency exchange in Bern in October. Following the exchange, OTA and the The Organic Center spent a day at FiBL, the world's largest organic research organization, discussing latest developments and ways to collaborate.

SIAL Paris | TASC | OTA hosted 7 companies at SIAL, 2016's largest food fair. OTA participants projected \$10,505,000 in sales a result of participating in the activity.

Enjoy Organic | MAP | OTA partnered with 11 retailers and even more importers in Japan to showcase over 50 U.S. organic products during a week-long promotion in Japan. The success of the promotion was celebrated at Deputy Chief of Mission Jason Hyland's home in Tokyo.

Organic Lifestyle Expo Japan | MAP | OTA participated in the keynote seminar at the first-ever Organic Lifestyle Expo in Japan discussing the challenges and opportunities of growing the organic industry.

Middle East Natural and Organic Product Expo | MAP | For the first time ever, OTA and 3 member companies attend MENOPE in Dubai. UAE is the fastest-growing export market for U.S. organic products. OTA delivered a speech and met with key distributors at the show.

E-Mart Korea In-Store Promotion | MAP | OTA partnered with major retailer E-Mart on an in-store and online digital promotion not only highlighting brands but the benefits of organic. Preliminary results are great! Online sales increased 118% from same period a year earlier. Offline sales increased 28% from same period a year earlier.

Korea Influencer Outreach | MAP | 100 influencers around Seoul received a basket of U.S. organic products to enjoy for end of year! 10 U.S. brands find themselves in the hands of artists, architects, designers, chefs, and socialites influencing the Seoul scene.

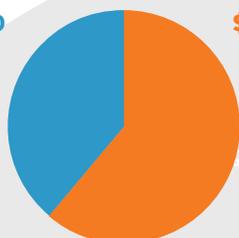
Organic Equivalency Around the World | TASC | There are over 38 organic equivalency arrangements in place around the world. OTA was at the table for a key discussion on the potential for plurilateral arrangements as the global organic market continues to grow.

OTA Global Program Evaluation | MAP | OTA's MAP program was evaluated by a third party auditor to ensure the program continues to meet the needs of the diverse U.S. organic market. Copies of the evaluation are available on request.

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- MAP** = Market Access Program
 - TASC** = Technical Assistance for Specialty Crops
 - FAS** = Foreign Agricultural Service
 - NOP** = National Organic Program
 - ACA** = Accredited Certifying Agent
 - AMS** = Agriculture Marketing Service
 - HS** = Harmonized Schedule
 - Harmonized Tariff Schedule
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2016 USDA GRANT FUNDING

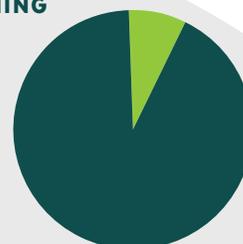
TASC
\$498,000



MAP
\$889,393

2016 SPENDING CATEGORIES

PROGRAMMING
92%



ADMIN
8%

A LOOK AHEAD

Trade Mission to Singapore and Malaysia

JANUARY

OTA and 4 organic companies will participate in a buyers' mission and market investigation in to fast-growing Asian markets for USDA certified organic products.

Mexican Health Products Summit

JANUARY

OTA will deliver a key note at the summit and host 1:1 buyer meetings representing a diverse range of U.S. organic products in an effort to grow stronger ties with retailers in Mexico as the implementation of its domestic regulations draws near.

BIOFACH / VIVANESS

FEBRUARY

OTA will host 13 companies at BioFach and 4 companies at Vivaness – the largest trade organic trade show in the world, in Nuremberg. OTA will lead 3 panels and speak on 3 more at the BioFach congress as well.

FoodEx Japan

MARCH

OTA will deliver a key note speech at FoodEx Japan, Japan's largest trade show. And for the first time, OTA will host 5 companies in the USA pavilion. Japan is the #1 market for U.S. organic products in Asia.

Natural Products Expo West Buyers Mission

MARCH

OTA will host buyers from around the world, who will meet with U.S. organic companies off the hectic trade show floor in pre-arranged 1:1 meeting.

Seoul Hotel and Food

MAY

OTA will host 7 companies at the Seoul Hotel in Food show at Kintex for the third year in a row!

Trade Mission to Hong Kong

JUNE

OTA will lead for the first time a trade mission to Hong Kong and host a seminar for buyers and importers in partnership with FAS in Hong Kong.

Organic Category Management Training

JULY

For a developing market, positioning and differentiating organic products in the store can be a challenge. OTA will host an Organic category management training open to retailers from around the world. This interactive hands-on training will showcase the latest techniques and best practices for selling organic across a variety of retail channels.

Organic Retail Promotions Mexico and Taiwan

AUGUST

Mexico and Taiwan are key growth markets for U.S. organic products (2nd and 4th largest markets respectively). OTA will work to increase exposure of the USDA Organic seal and support products on the shelves with in-store demoing at key retail partners in both markets.

Natural Products Expo East

SEPTEMBER

OTA will host key member meetings at Expo East in an effort to meet the needs of the diverse group of U.S. organic producers and exporters. Please join the conversation and help grow the success of the whole industry by sharing your perspective and expertise.

Anuga

OCTOBER

Anuga is the largest food trade show in the world in 2017. OTA will return with 8 companies to represent the U.S. organic industry at the show.

Trade Mission to the Middle East

OCTOBER

The Middle East is the fastest-growing region for U.S. organic exports. OTA stakeholders have identified Israel as a key market of U.S. organic products. As a result, OTA will lead a trade mission to Israel following Anuga for the first time.

Promotion in Japan and Korea

NOVEMBER

After two successful promotions in 2016, OTA is dedicating funds to promote US organic products on the shelves in Japan and Korea. Partnering with producers and imports makes these international collaborations a true success!

OTA as Part of Your Export Team

ONGOING

OTA will continue to provide organic market intelligence to U.S. exporters; serve as representative of the U.S. organic industry to the global market, and work 1:1 with companies to find export opportunities for U.S. produced, U.S. ingredient-based organic products.



About OTA

The Organic Trade Association (OTA) is the membership-based business association for organic agriculture and products in North America. OTA is the leading voice for the organic trade in the United States, representing over 8,500 organic businesses across 50 states. Its members include growers, shippers, processors, certifiers, farmers' associations, distributors, importers, exporters, consultants, retailers and others. OTA's Board of Directors is democratically elected by its members.

About OTA Export Program Funding

OTA's organic export initiatives are funded through the U.S. Department of Agriculture's (USDA) Foreign Agricultural Service (FAS) Market Access Program (MAP). Since 1999, FAS has awarded millions of dollars to OTA to help expand commercial export markets for U.S. organic products. OTA aims to showcase and educate key target markets on the quality, integrity and variety of USDA-certified organic products available for export around the world.

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