

**Organic  
Development  
Group**



**Grow like the future  
depends on it**

**Federal Election Priorities 2025**



## Introduction

The 2025 Federal Election comes at a critical moment for Australia's organic industry and the approximately 3,000 certified organic operators nationwide. Australia's organic sector generates ~\$2.6bn annually for the Australian economy and supports 22,000 FTE jobs. Additionally, Australia holds over 50 per cent of the world's certified organic land (the largest share globally) and is well placed to contribute to the agriculture industry's \$100bn by 2030 goal.

Despite this, the Australian organic industry receives no direct government support—a stark contrast to the United States and the European Union, key regions where significant investment in organics is driving industry expansion. In the United States, investment and policies in organic led to the USA organic industry reaching the highest value in its history at \$69.7bn USD. In Europe, the EU's Farm to Fork Strategy to have 25 per cent organic farmland across the EU by 2030 has helped lead to a threefold increase in the EU organic market since 2000. Without proactive measures, Australia risks falling behind its global competitors.

There has been growing recognition of the need for greater support for the organic industry. The Trading North report, the Food for Thought report and the introduction of the National Organic Standard Bill 2024 (The Bill) in November 2024 highlighted major policy and funding gaps for the Australian organic industry. These shortfalls require urgent political action in order for the Australian organic industry to thrive and go on to capture a greater share of the global organic opportunity.

In response to these reports and the introduction of the Bill, the Organic Development Group (ODG), representing more than 90% of Australian organic operators, has consulted with its members to identify four priority areas that must be addressed by government post the 2025 election, to ensure the Australian organic industry grows and is protected.

### Growing the Industry

1. Pass domestic regulation of the Australian organic industry within 12 months of election.
2. Accelerate market access for organic exports.
3. Invest in data collection to measure the organic industry's positive environmental and health impacts and its potential to accelerate Australia's progress towards its \$100bn agriculture industry goal by 2030.

### Protecting the Industry

4. Maintaining traceability and establishing appropriate biosecurity measures to safeguard organic integrity.

These key commitments are supported by the ODG and its members, with a member survey showing 97% industry support for commitment asks 1, 2 and 4 and 79% industry support for commitment ask 3. The industry is aligned behind these critical requirements and this election presents an opportunity for political parties to demonstrate their commitment to a thriving Australian organic sector.

## The Organic Development Group







# Table of Contents

<b>Page 4:</b>	Key Facts - Australia's Organic Industry
<b>Page 5:</b>	Growing the Industry - Overview
<b>Page 6:</b>	Growing the Industry - Domestic Regulation
<b>Page 7 &amp; 8:</b>	Growing the Industry - Accelerating Market Access
<b>Page 9:</b>	Growing the Industry - Improving Data Collection
<b>Page 11:</b>	Protecting the Industry - Overview
<b>Page 12:</b>	Protecting the Industry - Traceability and Biosecurity Measures
<b>Page 13:</b>	Conclusion
<b>Page 14:</b>	References





# Key Facts Australian Organic Industry

Australia holds over

# 50%



of the world's certified organic land



The organic industry represents over 3,000 certified operators from paddock to plate



# \$ 2.6b

annually for the Australian economy



supports

# 22,000

FTE jobs



Australia remains the only OECD country **without** a mandated domestic organic standard.



## Growing the Industry

Organic operators and industry bodies have emphasised the need for greater government support to unlock the full potential of Australia's organic sector. Market analysis from the 2023 Australian Organic Market Report suggests that, with the right policy framework, the industry's total value could have more than doubled to \$5.8 billion by 2026/27. However, under the current regulatory landscape, growth has stagnated, with industry estimates fluctuating between \$2.3 billion and \$2.6 billion since 2021. In comparison the United States grew from approximately \$62bn USD to \$69.7bn USD, and the European Union grew three per cent from its previous total.

This trend indicates that existing policy mechanisms are insufficient to support expansion, export growth and industry resilience. In response, the ODG has identified three key commitments that the next government must prioritise to accelerate industry development.

- 1. Pass domestic regulation of the Australian organic industry within 12 months of election.**
- 2. Accelerate market access for organic exports**
- 3. Invest in data collection to measure the organic industry's positive environmental and health impacts and its potential to accelerate Australia's progress towards its \$100bn agriculture industry goal by 2030.**





## Pass Domestic Regulation Within 12 Months



Without regulation, the industry faces barriers to international market access, consumer trust issues and unfair competition.

The call for domestic regulation in Australia dates back to the 1990s, yet Australia remains the only OECD country without a mandated domestic organic standard.

Domestic regulation has repeatedly been identified as a key requirement to unlock further growth by organic industry groups, certifiers and operators. The recently completed inquiry into the National Organic Standard Bill 2024 showed over 96 per cent of all submissions supported domestic regulation of the organic industry. Certified organic operators have highlighted that without domestic regulation, access to key international markets remains costly and complicated, as Australia lacks equivalency agreements that would allow seamless exports. Additionally, the absence of regulation undermines consumer trust, as uncertified products can make misleading organic claims without clear enforcement mechanisms.

This lack of regulation directly affects organic businesses. Operators seeking to export face significant financial and administrative burdens due to the cost of gaining the correct certification for export. The following is the annual cost to enter markets where either no equivalency or only partial equivalency exists:

<b>China:</b>	\$9724 per year.
<b>USA:</b>	\$4160 per year
<b>South Korea:</b>	\$5495 per year
<b>Japan:</b>	\$4290 per year
<b>Europe</b>	\$3620 per year

In contrast, the average cost of certification to the National Standard is between \$1000 and \$3000 per year. Currently organic operators are spending approximately \$3.7 million a year extra on certification to enter these markets due to the lack of equivalence with the National Standard.

Reducing the cost of market access would align with broader agricultural asks to strengthen market access and competitiveness through enhanced trade diplomacy, market development and measures ensuring fair competition in all domestic markets.

Consumer confidence is also impacted when individuals purchase organic-labelled products that they later discover are not certified organic or are unable to support organic claims. Studies conducted for the Australian Organic Market Report showed approximately one third of all organic consumers had been misled by a product claiming to be organic when it wasn't.



The need to address the requirement for domestic regulation has been noted in three government reports within the past three months.

The **Trading North** report recommended to:

“Conduct a review of domestic regulatory framework to ensure its alignment with current international standards and potential rival jurisdictions. Additionally, establish mechanisms within the framework to define and regulate organic products within Australia’s domestic market, promoting clarity and consistency.”

The **Food for Thought** report recommended:

...” that the Australian Government, in consultation with industry stakeholders, implement a program of certification for the domestic organic food market, and amend the Australian Competition & Consumer Commission’s definition of the term ‘organic’ to mean ‘certified organic’.

The **National Organic Standard Bill** inquiry report also noted that a properly designed domestic regulation could:

“Be beneficial for import and export markets along with the domestic market and could provide additional consumer confidence in Australian organic produce.”

### WHAT WE NEED

**The ODG calls on the next government to have domestic regulation in place by May 2026, 12 months after the May 2025 election.**

The ODG acknowledges the National Organic Standard Bill inquiry reports call for a scoping exercise. The ODG calls for any scoping exercise to include engagement with the organic industry to determine the best terms of reference and a timeline for this scoping exercise to achieve the goal of domestic regulation in place by May 2026, 12 months after the May 2025 election.

To support the development and implementation of domestic regulation, Australian Organic Limited’s (AOL) 2025/26 Budget Submission requests \$5.2 million dollars over 4 years.

## Accelerating Market Access



Gaps in investment add financial and administrative burdens for Australian organic operators seeking to access new markets.

The global organic market is valued at over \$227 Billion AUD and is rapidly evolving. As an export focused agricultural nation, it remains pivotal to minimise the technical market access barriers and offer strategic support for the organic sector to surpass our current 1 per cent global market contribution and capitalise on the export opportunity.

Certified organic operators looking to expand into new markets face considerable challenges, including:

- Lack of equivalency with key trading partners (ie USA, South Korea, Canada, UK).
- Limited categories in current equivalencies (ie major exports livestock and wine excluded).
- Limited information on potential export markets and technical access requirements.
- Lack of organic-specific expertise from current export resources (ie agricultural counsellors).
- Absence of targeted grant programs to grow organic exports.
- Inadequate and inconsistent funding to strategically support international trade engagement.

Accelerating market access for Australian organic operators is a two-tiered process, whereby domestic regulation of organics may unlock opportunities to more lucrative government-to-government equivalency arrangements. As a prescribed good, organic goods may have technical barriers to trade, especially within regulated countries that have advanced domestic organic legislation such as key trading partners like the United States, Canada and Korea. These countries have noted they will not consider equivalency until the introduction of a domestic standard. The US organic market is expected to reach \$100 billion USD by 2033, with limited US domestic livestock production, representing a lucrative opportunity for Australian producers.



Out of Australia's current five government to government equivalencies, only Taiwan currently includes wine, and only Taiwan and Japan include livestock products. As the two current major Australian organic export industries, the partial equivalencies result in a situation where commodities outside of the equivalency have technical barriers to trade or require a re-certification or conformity assessment process, greatly increasing the cost and administrative burden on the operator.

This has resulted in organic operators exporting certified organic product as non-organic, or organic operators looking at manufacturing opportunities in better-supported markets such as New Zealand, where stronger international trade prioritisation has allowed increased export opportunities through equivalencies and equivalency commitments from major trade partners.

Accordingly, the ODG remains committed to work with government to ensure current and future resources are strategically optimised toward further equivalencies with major trade partners such as the USA, Canada, South Korea, China, UK and EU in a timely manner. This will ensure the organic sector can rapidly grow its contribution toward the national agricultural industry goal of reaching \$100 billion by 2030.

## Accelerating Market Access

Concurrent with the need to expedite equivalencies, the Trading North report (November 2024) provided four key recommendations to improve organic market access, particularly in Southeast Asia, where demand for certified organic products is rising :

- Improve the accessibility and detail of information provided on the Manual of Importing Country Requirements (MICOR) and Austrade websites, with a specific focus on catering to the requirements (treatments, regulatory) for prospective organic exporters.
- Appoint a dedicated point of contact officer for Asian markets, with a background in the organic industry and a thorough understanding of the requirements for organic export. This individual would be a valuable resource for organic operators seeking market access in Asia.
- Allocate ongoing funding to improve resources available for the organic industry. This funding would help strengthen trade relationships and organic certification pathways in Southeast Asia.
- Implement organic-specific grant programs to support organic businesses seeking to expand into new markets.

All of these recommendations are supported and endorsed by the ODG, integral to the strategic growth of organics and align with the broader asks of the Australian agricultural sector.

### WHAT WE NEED

The ODG calls upon the next government to:

- Improve resource allocation within the DAFF organic program to accelerate equivalency negotiations with key trading partners to reduce certification burdens and improve market access.
- Implement all recommendations outlined above from the 'Trading North' Report.







## Measuring the Positive Impact & Potential of the Organic Industry



A persistent challenge for the organic sector is the lack of comprehensive data and measurement in Australia.

The Australian organic industry has been producing without the use of chemical pesticides and synthetic fertilisers used in agriculture, while setting aside a minimum of 5 cent of land under organic production for biodiversity support for native vegetation and management of waterways and other natural features for more than 30 years. However, to date there has not been government research or investment in the organic industry in Australia. While countries like the United States and the European Union have made substantial investments in organic research and industry benchmarking, Australia lags behind, risking its ability to compete in global markets.

Lack of investment in measuring the positive impacts and potential of the organic industry poses several challenges, and leads to missed opportunities for understanding organic farming in Australia. These challenges include:

- Farm surveys still do not have an option for organic operators to specify their status, limiting accurate industry representation.
- To date there has not been investment in research and development (R&D) to support ongoing innovation of the organic sector. Outdated and fragmented data fails to accurately capture the sector's scale, growth potential and economic contributions.
- The current lack of measurement of the organic industry means there is little understanding of the positive sustainability impacts of organic farming in Australia.
- Lack of data on the industry makes it difficult to provide suitable cost benefit analysis, which impacts on the ability of the organic industry to seek greater support and investment.

This lack of data transparency and reliable measurement weakens the ability of industry and stakeholders to advocate for strategic investments and policy support, limiting recognition of organic agriculture's revenue potential and sustainability benefits.

The next government must improve data collection and reporting for the organic industry, ensuring accurate tracking of its growth, sustainability contributions, and economic impact. Priority areas for improvement include:

- Sustainability reporting
- Market performance of organic products
- Trade competitiveness

These improvements will equip policymakers, industry leaders, and researchers with the data needed to advocate for better funding, policy development and investment in the organic sector. They will also align with broader industries calls for new knowledge and tools for support to respond to issues such as climate change.

### WHAT WE NEED

**The ODG calls for targeted commitments in the following areas:**

- Ongoing production of an annual Australian Organic Market Report to provide up-to-date insights on industry trends, economic value, and sustainability impacts.
- Development and implementation of an API-based data transfer system for certification bodies, ensuring streamlined and consistent organic industry data collection.
- Industry benchmarking and regulatory reporting tailored to the organic sector, improving trade competitiveness and understand and track sustainability and health impacts of organic farming systems.

The industry seeks commitment to a minimum investment of \$2.3M over 4 yrs to implement foundational reporting.



“

*Australia's organic industry has reached a pivotal stage of growth.*

*Once considered a niche sector, it has evolved into a mainstream contributor to agriculture and the national economy.*

”







## Protecting the Industry

Robust traceability systems are fundamental to certified organic systems through the National Standard for Organic and Biodynamic Produce, as well as widely adopted private organic standards in Australia. These systems ensure that certified organic products comply with strict production standards, preventing contamination from genetically modified (GM) organisms and other prohibited inputs.

Recent proposals by FSANZ and the Department of Health seek to exempt certain GM goods from mandatory labelling. If implemented, these exemptions would pose serious governance and financial risks to the Australian organic sector, both domestically and internationally.

To safeguard the organic sector and align with broader agriculture industry calls to plan for Australia's future food security, the ODG has identified the key commitment below to help maintain and protect Australia's organic industry.

### **Key Priority for Protecting the Industry:**

#### **4. Maintaining Traceability and Establishing Appropriate Biosecurity Measures to Safeguard Organic Integrity**





## Maintaining Traceability and Establishing Appropriate Biosecurity Measures to Safeguard Organic Integrity



Without robust protections, Australia's organic sector risks compromised certification, weakened consumer trust, & lost market opportunities

Traceability and biosecurity measurements are critical to maintaining the integrity of organic certification and ensuring its long-term viability. Without robust protections, Australia's organic sector risks compromised certification, weakened consumer trust, and lost market opportunities.

Additionally, biosecurity risks are increasing as seed production shifts offshore. High labour costs have forced organic seed production overseas, increasing reliance on imported seed and heightening the risk of contamination. Compounding this issue, Australia's biosecurity strategies do not explicitly consider organic production, leaving gaps in protection for certified organic operations.

Recently proposed changes from Food Standards Australia and New Zealand (Proposal 1055: Definitions for gene technology and new breeding techniques and amendments to the Gene Technology Act 2000) risk making it harder to trace GM seeds and inputs which would potentially negatively impact the viability of Australia's organic industry.

### WHAT WE NEED

**To protect the integrity of Australia's organic sector, the ODG calls on all parties and politicians to commit to the following if the proposed changes from FSANZ Proposal 1055 and the amendments to the Gene Technology Act 2000 are adopted, to ensure that any changes to GM regulation do not diminish traceability for the organic industry:**

- **Implement a national GM supply chain testing program** – Establish proactive testing measures to detect potential GM contamination and verify compliance with organic standards.

- **Fund dedicated staff to monitor and communicate GM developments** – Strengthen regulatory oversight by ensuring both industry and policymakers have access to up-to-date information on emerging genetic technologies and contamination risks
- **Support organic seed production programs** - Invest in domestic seed production to reduce reliance on imports, ensuring the availability of non-GM seed stock for Australian organic farms.
- **Develop a centralised digital certification system** – Improve traceability, efficiency, and security of organic certification through digital solutions, reducing administrative burdens while enhancing compliance oversight.
- **Inclusion of organic in Biosecurity strategies** – Future biosecurity strategies under the next federal government must include the organic industry to ensure integrity of the organic industry from potential biosecurity threats.

These measures will strengthen the organic sector's ability to maintain traceability, certification integrity, and establish appropriate biosecurity measures to support long-term viability. Ensuring that the adoption of any new policies (including current proposed changes to GMO) do not result in degradation of traceability capabilities for the Australian organic industry.

The ODG urges the government to implement these commitments before the 2028 election. The ODG seeks a commitment of \$19.5M over four years to support traceability for the organic industry.





## Conclusion

Australia's organic industry has reached a pivotal stage of growth. Once considered a niche sector, it has evolved into a mainstream contributor to agriculture and the national economy. However, current policy settings have not kept pace with industry development, limiting opportunities for expansion, exports, and global competitiveness.

The ODG has engaged extensively with organic operators, government departments, policymakers, and industry stakeholders to identify the most pressing challenges and opportunities for the sector. The policy commitments outlined in this document offer the next government a clear, actionable roadmap to:

- Ensure regulatory certainty through domestic organic regulation.
- Facilitate export growth by addressing market access barriers.
- Enhance industry data collection and analysis to support informed policymaking.
- Strengthen traceability and biosecurity to protect organic integrity.

These commitments represent a strategic opportunity for the next parliament to invest in a high-growth, high-value industry that supports rural economies, strengthens consumer trust, and aligns with global sustainability goals.

The organic industry is ready to work with all political leaders and parties to ensure these priorities are realised. With the right policy settings, Australia's organic industry can continue its trajectory of success, delivering economic growth, environmental resilience, and enhance its global market position.



# List of References

ACIL Allen, Mobium Group, & NielsenIQ. (2023). Australian Organic Market Report 2023. Australian Organic Limited.

Australian Organic Limited (2024). Submission to Food and Beverage Manufacturing in Australia Inquiry. House Committee on Industry, Science and Resources.

Australian Organic Limited (2024) Submission in Response to Proposal P1055 2nd Call for Submissions: Definitions for gene technology and new breeding techniques.

Australian Organic Limited (2024) Submission: Draft Gene Technology Amendment Bill.

Australian Organic Limited (2025). 2025/26 Pre-Budget Submission. Treasury.

Department of Agriculture Fisheries and Forestry 2023, Snapshot of Australian Agriculture 2023.

Organic Trade Association 2022, Organic Trade Association Applauds Investment of up to \$300 Million in New Organic Transition Initiative, Media Release.

European Commission 2020, Farm to Fork Strategy: For a fair, healthy and environmentally-friendly food system, European Union.

Lampkin, Nicolas, Ingrid Jahrl and Sabine Reinecke, (2025), Achieving the EU Farm-to-Fork 25% Organic Target: How Can Policy Support This Goal?, FiBL, pgs 213-219

McNeil, Maggie (2025), U.S. Organic Sector 2024: Challenges and Opportunities, FiBL, pgs 234-239.

National Farmers Federation (2025) Securing Australia's farming future: Federal Election 2025.

Rural and Regional Affairs and Transport Committee (2025), National Organic Standard Bill 2024. The Senate.

Organic Development Group, National Organic Standard Bill 2024, Submission 20.1-20.2.

FiBL & IFOAM – ORGANICS INTERNATIONAL. The World of organic agriculture STATISTICS & EMERGING TRENDS 2025. Available at: <https://www.fibl.org/fileadmin/documents/shop/1797-organic-world-2025.pdf>

## Websites

Australian Organic Limited 2025, Why Certify, Australian Organic Limited, Nundah, Queensland, <<https://austorganic.com/certification-and-standards/why-certify/>>

Australian Organic Limited 2025, Organic Food Production, Australian Organic Limited, Nundah, Queensland, <<https://austorganic.com/organic-food-production/>>

Department of Agriculture Fisheries and Forestry 2022, Delivering Ag2030, Department of Agriculture Fisheries and Forestry, <<https://www.agriculture.gov.au/agriculture-land/farm-food-drought/ag2030>>

Department of Agriculture Fisheries and Forestry 2022, NS for Organic and Bio-Dynamic Produce, Department of Agriculture Fisheries and Forestry, <<https://www.agriculture.gov.au/sites/default/files/documents/national-standard-edition.pdf>>

Parliament of Australia 2024, Trading North, Parliament of Australia, <[https://www.aph.gov.au/Parliamentary\\_Business/Committees/House/Agriculture/AgricultureandSEAsia/Report](https://www.aph.gov.au/Parliamentary_Business/Committees/House/Agriculture/AgricultureandSEAsia/Report)>

Department of Health and Aged Care 2024, Proposed amendments to the Gene Technology Act 2000, Department of Health and Aged Care, <<https://consultations.health.gov.au/best-practice-regulation/amendments-to-the-gene-technology-act-200/>>

Parliament of Australia 2025, Food for Thought, Parliament of Australia, <[https://parlinfo.aph.gov.au/parlInfo/download/committees/reportrep/RB000386/toc\\_pdf/FoodforThought.pdf](https://parlinfo.aph.gov.au/parlInfo/download/committees/reportrep/RB000386/toc_pdf/FoodforThought.pdf)>

Parliament of Australia 2025, National Organic Standard Bill 2024, <[https://parlinfo.aph.gov.au/parlInfo/download/committees/reportsen/RB000554/toc\\_pdf/NationalOrganicStandardBill2024.pdf](https://parlinfo.aph.gov.au/parlInfo/download/committees/reportsen/RB000554/toc_pdf/NationalOrganicStandardBill2024.pdf)>

Department of Agriculture Fisheries and Forestry, Organics, Department of Agriculture Fisheries and Forestry <<https://micor.agriculture.gov.au/organics/Pages/default.aspx>>

Natural News Desk 2025, US organic sales predicted to reach \$100bn within a decade, but political support remains uncertain after Trump win, Natural News Desk, <<https://naturalnewsdesk.co.uk/2025/02/15/us-organic-sales-predicted-to-reach-100bn-within-a-decade-but-political-support-remains-uncertain-after-trump-win/>>

FSANZ 2024, Proposal P1055 - Definitions for gene technology and new breeding techniques, FSANZ, <Proposal P1055 - Definitions for gene technology and new breeding techniques | Food Standards Australia New Zealand>





**Organic  
Development  
Group**