



**Santos Organics,
Organic Workshop**

Byron Bay 17th April 2026

SXC - Certification made Simple

No Industry or Marketing Levies



- Introduction – Ben Copeman & Matt Bird
- Global Overview & Exports
- National Growth, Trends & Opportunities
- Main Drivers, Consumer Trends & the Future
- Issues within the Certification Industry
- Why is SXC any Different
- SXC Certification Process
- Q&A



Ben Copeman

- Extensive agribusiness experience of more than 35 years
- CEO of Ecofibre Industries Limited, the pioneers of Industrial Hemp production in Australia
- General Manager of The National Association of Sustainable Agriculture Australia (NASAA) in South Australia
- CEO of the Royal National Capital Agricultural Society in Canberra
- Chief Executive Officer at Australian Certified Organic (ACO) Pty Ltd
- CEO / Joint Founder of Southern Cross Certified Pty Ltd



- Extensive certification & compliance experience of more than 20 years
- Former Sustainable Forestry auditor
- Specialist in ISO17065 & Quality Programs
- Wrote all of SXC's software programs



SOUTHERN CROSS CERTIFIED



FiBL

IFOAM
ORGANICS
INTERNATIONAL

Acknowledgement

All information and data in this presentation has been sourced from the FiBL & IFOAM The World of Organic Agriculture Market Report 2026 unless otherwise stated.

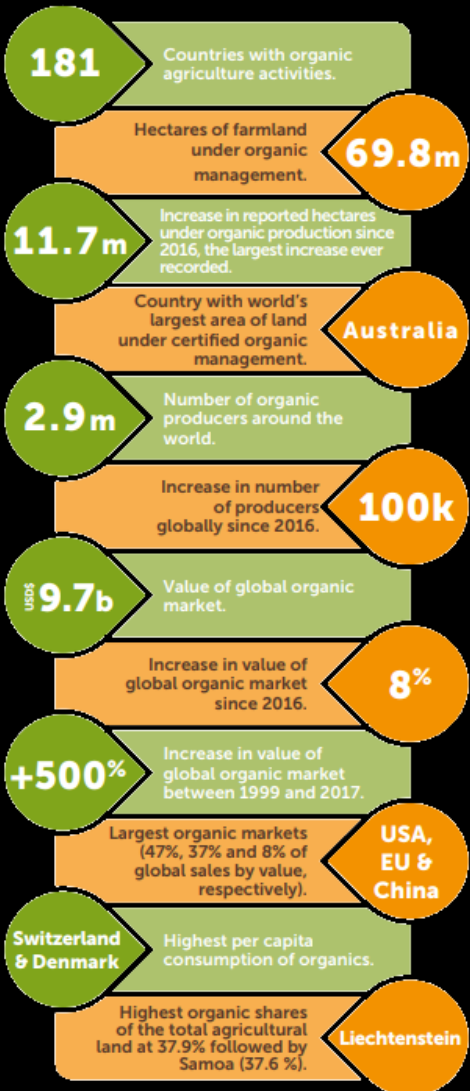


QUICK GLOBAL FACTS

Organics Globally. Some Quick Facts

(Source: FiBL Survey 2026)

- Global value in excess of €145.0B (US\$171.27B) in 2020 (8% pa growth since 2016)
- Global organics is dominated by the USA (US\$60.4B) & Western Europe (€17B)
- China & SE Asia continues to expand as major emerging market (€15.5B)
- Currently, 4.8m organic producers globally (up 15% on 2021)
- 183 countries participate in organic agriculture with in excess of 98.9m ha farmed globally (up from 15m ha in 2000; and up from 78m ha in 2021)
- Australia has over 50% of this land with 53.0m ha (14.6% of Australia's arable land is certified organic or in conversion)
- Organic land constitutes 2.5% of global farming land (up 31.7m ha from 2017)
- 98 countries have their own Organic Standard.
- 11 are in the processing of drafting National legislation to protect the term "organic." Australia is considering Regulations



[Source: 2016 World of Organic Agriculture]



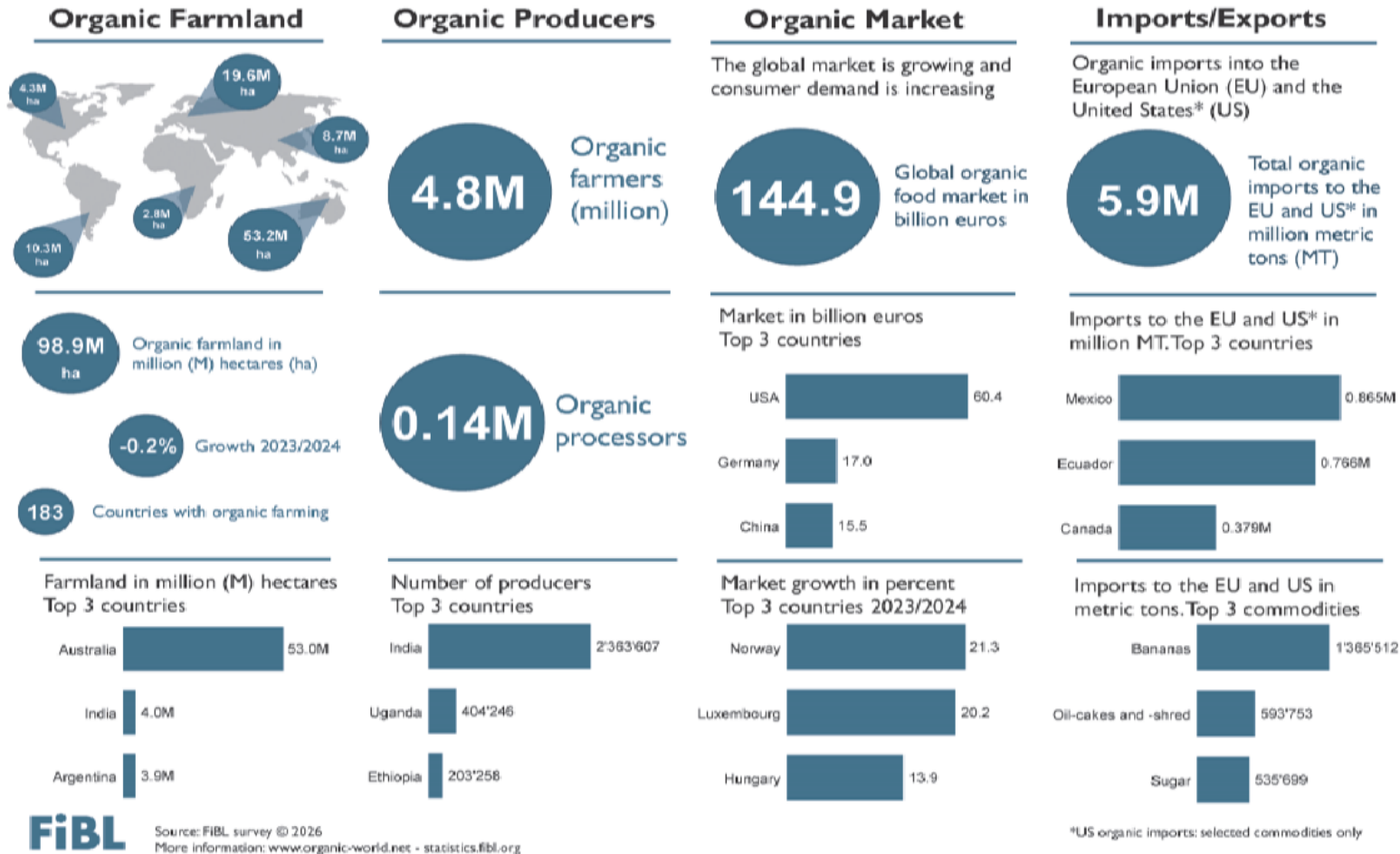
QUICK GLOBAL FACTS

- About 23.8m ha globally are dedicated to crop growing of some sort. Specifically, 16.5m ha to annual crops; 6.9m ha are dedicated to organic permanent cropland, being citrus, grapes, cocoa, coconut, olives & fruits
- About 69.6m ha (or 66%) globally are dedicated to certified organic grassland/grazing
- Australia: 52m ha are dedicated to grazing: 103,948ha are dedicated to arable crops; of this, 41.293ha are dedicated to cereal crops
- Tropical fruit, (fresh or dried,) nuts & spices are the largest product category imported by the EU;
- Australian organic sector has grown at an annualised rate of 15% since 2014
- Global demand for organic produce is rising substantially thanks to increasing health concerns about food. Industrywide revenue is expected to expand at an annualised 10.1%. This trend includes anticipated growth of 11.4% in the current year, with an increase in demand from food product manufacturing and a rise in health consciousness boosting overall domestic demand for organic food. Ref: IBIS World Organic Farming in Australia



QUICK GLOBAL FACTS

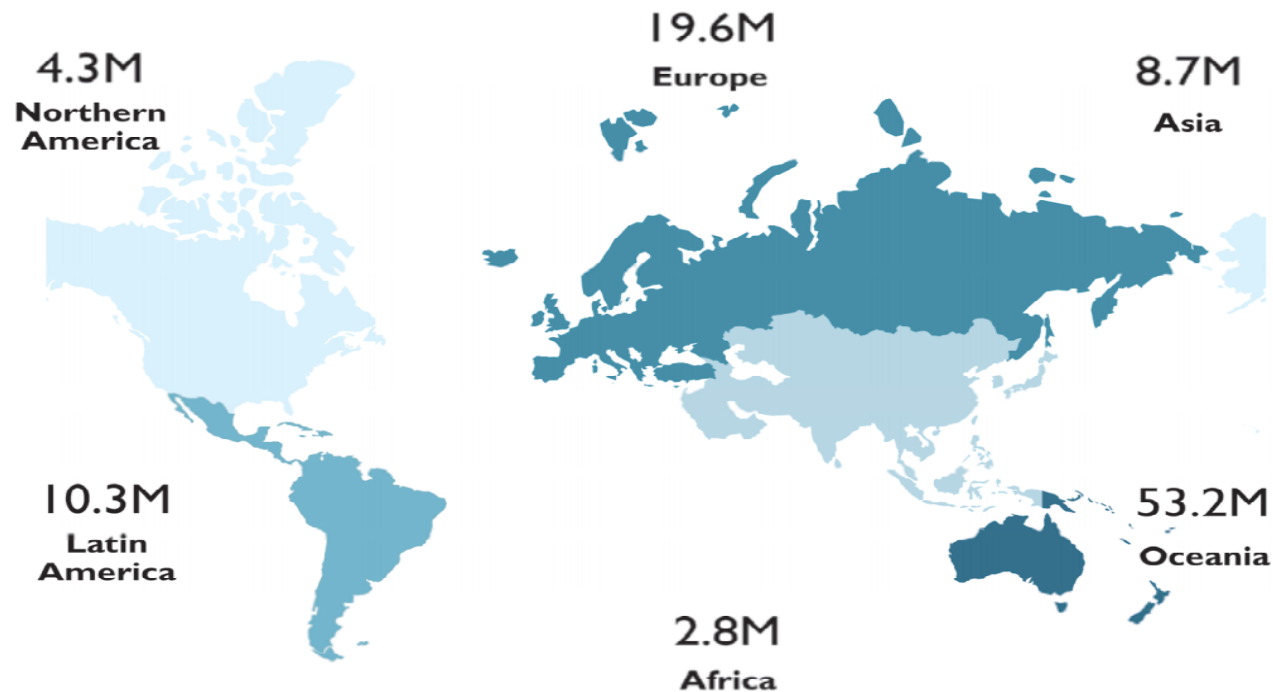
Organic Agriculture Worldwide 2024



Infographic I: Organic agriculture worldwide - key indicators 2024



Organic Agriculture Worldwide: Current Statistics





QUICK GLOBAL FACTS

World: Distribution of organic agricultural land by region 2024

Source: FiBL survey 2026

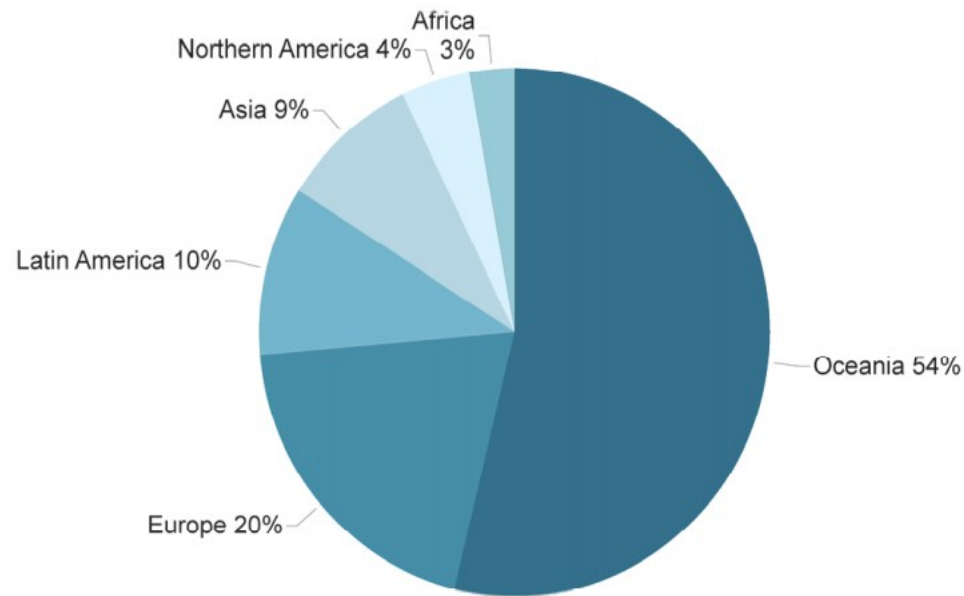


Figure 1: World: Distribution of organic agricultural land by region 2024

World: The ten countries with the largest areas of organic agricultural land 2024

Source: FiBL survey 2026

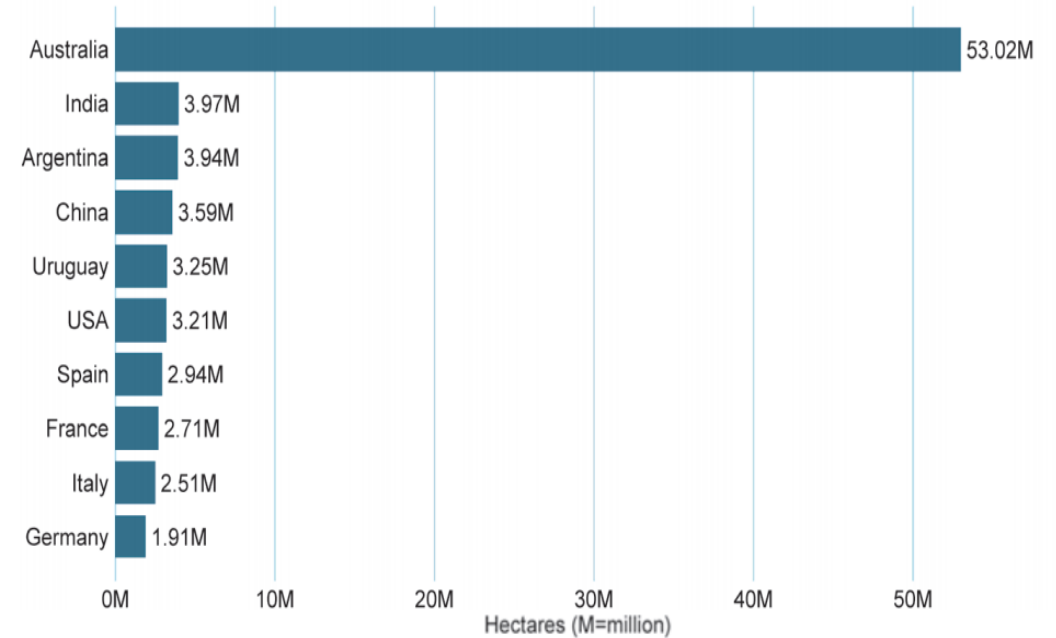


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2024



WHERE DO THE EXPORTS GO?



Top export destinations for organics from Australia:

- USA (beef) being challenged by the UAE
- EU (Wine, processed foods, cosmetics)
- China (baby formula/processed foods, Wine)
- New Zealand (non alcoholic drinks)
- South Korea (animals feeds, beef)
- Singapore (eggs/dairy/baby formula)



GROWTH OPPORTUNITIES FOR BUSINESS

Overview:

Australian Market is Currently Valued at AU\$3.5B, an increase of 24% since 2023. This equates to a 11% pa compounded growth rate for each year since. (Ref: Jacqueline Williams, School of Environmental & Rural Science, UNE)

The single biggest inhibitor of market growth, is supply.
Demand far outstrips supply

Opportunity:

Need to:

- Greatly increase the supply of products
- Ensure manufacturing, processing & retail get reliable supply
- Grow consumer awareness & confidence: The “Free from...” & Wellness aspects are still the key perceived benefits of organic food
- Break down the traditional barriers to shoppers increasing their purchases. (Value, trust and availability)
- Macro factors now influencing supply and demand (ie cost of living, fuel prices)

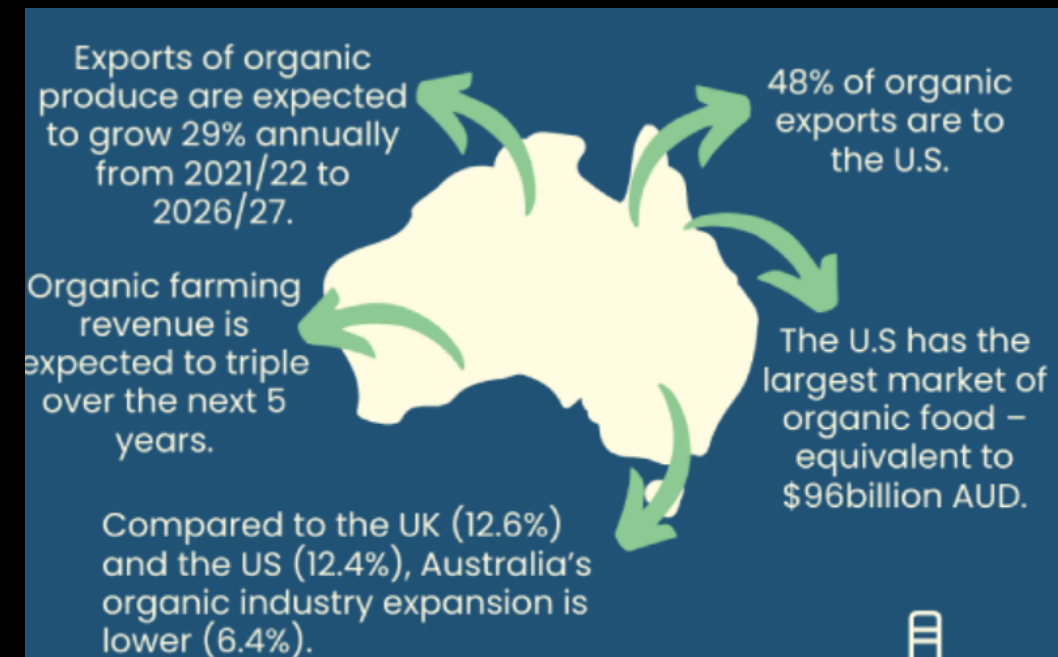
By 2022, the total value could be anticipated to reach or exceed

AU\$3.4 billion,
given the current growth trajectory.



GROWTH IN THE ORGANIC INDUSTRY

- Australia owns in excess of 50% of the world's organically managed farmland
 - Total 98.9m ha world wide. 53.0m ha in Australia
- Around 14.6% of Australian farmland is under certified organic management
- Total certified organic operators has decreased by an estimated 25% between 2021-2023 to approximately 3,305
 - 1,652 certified producers (↓ of 8.4%)
 - 1,322 certified processors (↓ of 33%)
 - 331 certified handlers (Stable)
- Top 3 purchased organic products
 - Fruit & vegetables
 - Home-cooking ingredients
 - Dairy





DRIVERS IN THE ORGANIC INDUSTRY

- Fastest Growing Sectors?
Dairy, beef, alcohol, fruit & vegetables
- Top Categories Purchased?
Beef & Veal, Dairy, Processed Foods, Alcohol
- Dairy stills remains the **most frequently purchased** organic product, with shoppers buying at least one product every month.
- Personal health (the 'Free from...') for the buyer and their family is the **strongest driver**





WHAT INFLUENCES THE INDUSTRY

Certification:

Negatives include:

- Perceived as being too hard, too much paper work;
- Too bureaucratic;
- Too expensive;
- Too slow;
- Certifiers are not helpful;
- Too hard to market

Certified organic producers received a 25% higher meat price premium compared to non-organic meat.



Fruit and vegetables often serve as the entry point for organic producers due to their lower start-up costs.



The main reasons farmers grow organic is that it's better for the environment, doesn't use synthetic chemicals and is more profitable.



Ref: Australian Organic Market Report 2023



CONSUMER AWARENESS & TRENDS

- In 2023, Shopping decisions dominated by 18 – 35 Y.O. female demographic
- In 2023, the Shopping Decision was split:
 - 52% Female
 - 48% Male
- The patterns of demographic variances seem to have disappeared, however Millennials are more engaged in the importance of clean food than older purchasers
- Certification awareness has increased **17%** since 2010
- **14%** of organic households say they spend **40%** or more of their food budget on organics
- **38%** of organic shoppers indicate they increased the percentage of their household food budget spent on organics over the past year
- Ref: Australian Organic Market Report, Various Editions



CURRENT POLITICAL STATE IN AUSTRALIA

- History: 1986 – 2026
- Organic Development Group
- Peak Industry Body
 - Advisory Boards
- Industry Mark (Logo)
- Government Lobbying
- Status as of NOW



FUTURE PREDICTIONS

- Regulation will see a spike in supply & demand due to increased confidence
- Regulation will, over time, see an increase in Government support
- Since Covid, an increased awareness of the impact food, fibre or cosmetics have on personal health
- Regulation will see the average proportion of household food spending allocated to organics, grow - cost of living crisis has definitely affected this
- Regulation should ensure the demand for certified produce remaining strong (or growing) for the foreseeable future. Even if Australia is sated, China and SE Asia will continue to keep prices high
- China to replace the USA as our largest export destination
- Whole Councils will become certified organic
- Will see the growth of new standards such as Regenerative Agricultural Standards (Rodale, Savory) as enhancements of organic. Will merge with Organic Standards



SUMMARY OF WHERE WE ARE AT

We have Discussed:

- The Global Market
- The Australian Market
- Current State of Play
- Crystal Ball Gazing

Next

- Issues with Organic certification in Australia
- SXC's Response
- Application, Auditing & Certification



ISSUES WITH CERTIFICATION

- Industry has become:
 - Too complex, too bureaucratic;
 - Lacking in innovation & change;
 - More focused on branding than service delivery;
- Small farmers & processors are being squeezed out. Fees & levies have priced certification out of reach
- Paper based application forms are repetitive and take too long to fill in
- ‘Clunky’ IT systems have made the certification process complicated and turnaround times are slow
- Very high staff turnovers has reduced industry knowledge



SOUTHERN CROSS CERTIFIED DIFFERENTIATOR

What Drove the Development of SX Certified?

- Make it simple; Remove paper; Make it faster; Make it easier to understand; Make audits beneficial & enjoyable; Make it affordable at all levels; Provide domestic certification: Remove industry development & marketing levies; One Invoice, Once a Year

From this, we took three key points

- Certification made Simple
- No Industry Development or Marketing Levies
- 20 Day Certification Turnaround timeframes



APPLICATION & AUDITING PROCESS

- Receive Application
- Document Review
- Allocate Auditor
- Auditor Arranges Audit Date
- Audit Occurs
- SXC Receives Auditors Report
- Audit Review
- Issue Documents
- Sign & Return Cert Agreement; Pay Invoice
- Congratulations!!! You are Certified.....



IN CONVERSION REQUIREMENTS

- Land must be managed in accordance with an Organic Standard for a Minimum of 3 Years
- Can be Reduced to 12 months in Certain Circumstances
- Must be supported by Clean Soil Tests
- Livestock on the Property at the Time of Audit, can NEVER be Certified
- Livestock MUST be born onto the Certified Land
- Poultry MUST be on the Certified Land within 2 Days of Hatching
- Wool, Dairy have their own timeframes
- See NS, Table 3 in Section 1.14.3 for more details on IC



SOUTHERN CROSS CERTIFIED DIFFERENTIATOR

What We Can & Can't Do?

- SXC can certify products for export to the US & EU & facilitate certification for products for export to China & SE Asia & all non regulated markets
- SXC are not accredited to certify products for export to Korea.

What are our Application & Certification Processes

- All on line www.sxcertified.com.au
 - Application 30 minutes
 - Application review 15 minutes

 - Audit allocation 5 minutes
 - Auditor contact for date 7 – 10 days (depends on when you are ready)
 - Audit 3 hours MAX. for average size operations
 - Test results 7 – 10 days

 - Audit review & Cert decision 30 minutes to 1 hour



SOUTHERN CROSS CERTIFIED DIFFERENTIATOR

SUMMARY

- Very simple Application, Auditing & certification Process
- Application form becomes organic management / handling plan
- 20 days from application to certification decision
- No additional charges such as Industry or Marketing Levies
- Simplistic Fee Schedule
 - 1 invoice, once a year



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20 Day Turnaround

Questions ?

Certification made Simple

No Industry Levies



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