Global Organic Farming and Organic Markets: Programme

- Helga Willer (FiBL) / Minou Yussefi (SOEL)
  Global Statistics 2004

- Amarjit Sahota (Organic Monitor)
  The Global Market for Organic Food

- Bernward Geier (IFOAM)
  Challenges and Outlook

- Chair: Bernward Geier
Global Organic Statistics 2004

Helga Willer and Minou Yussefi
The study „The World of Organic Agriculture“

- 5th year
- Initiated by Hagen Sunder and Hubert Rottner of Biofach
- First study compiled for Biofach 2000 and presented there
- IFOAM and FiBL have actively supported the project since 2003
- 2004 edition: all chapters compiled and updated by experts
- Contents: Global statistics, global market, regulations and certification, continent reports
- Roles of partners (2004 edition)
  - SOEL – compilation of statistics
  - IFOAM – coordination of the publishing process
  - FiBL – compilation and editing of articles
  - NürnbergMesse - financial support
Global Organic Statistics 2004

- Current global statistics
- Continents
  - Africa
  - Asia
  - Australia / Oceania
  - Europe
  - Americas
Current Global Statistics

- Total certified organic area: more than 24 million hectares
- The market is 23 billion USD (Year: 2002)
- Countries with the highest area:
  - Australia: 10 million ha, Argentina: almost 3 million ha,
  - Italy: almost 1.2 million ha
- The proportion of organically managed land is highest in Europe
Global Map of Organic Agriculture

Source: SOEL-Survey 2004
Global Organic Land by Continents

- Oceania/Australia: 42%
- Latin America: 24%
- Europe: 23%
- North America: 6%
- Asia: 4%
- Africa: 1%
The ten countries with the highest area under organic management

<table>
<thead>
<tr>
<th>Country</th>
<th>Million Hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>10</td>
</tr>
<tr>
<td>Argentina</td>
<td>2.96</td>
</tr>
<tr>
<td>Italy</td>
<td>1.168</td>
</tr>
<tr>
<td>USA</td>
<td>0.95</td>
</tr>
<tr>
<td>Brazil</td>
<td>0.842</td>
</tr>
<tr>
<td>Uruguay</td>
<td>0.76</td>
</tr>
<tr>
<td>UK</td>
<td>0.76</td>
</tr>
<tr>
<td>Germany</td>
<td>0.697</td>
</tr>
<tr>
<td>Spain</td>
<td>0.665</td>
</tr>
<tr>
<td>France</td>
<td>0.509</td>
</tr>
</tbody>
</table>
The ten countries with the highest share of land under organic management

<table>
<thead>
<tr>
<th>Country</th>
<th>% of agricultural land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liechtenstein</td>
<td>28.4</td>
</tr>
<tr>
<td>Austria</td>
<td>11.6</td>
</tr>
<tr>
<td>Switzerland</td>
<td>10.0</td>
</tr>
<tr>
<td>Italy</td>
<td>6.6</td>
</tr>
<tr>
<td>Finland</td>
<td>6.5</td>
</tr>
<tr>
<td>Denmark</td>
<td>6.09</td>
</tr>
<tr>
<td>Sweden</td>
<td>5.09</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>4.1</td>
</tr>
<tr>
<td>Germany</td>
<td>4.0</td>
</tr>
<tr>
<td>Uruguay</td>
<td>4.0</td>
</tr>
</tbody>
</table>
Africa: The Facts

- Report by Nicholas Parrot and Fred Kalibwani (IFOAM Africa Coordinator)
- 320,000 hectares, 71,000 farms
- Organic farming is increasing, especially in the Southern countries
- Important growth factor: Demand for organic products in industrialised countries
- The African market for organic products is small (exceptions: Egypt, South Africa). Reasons: low income levels, underdeveloped infrastructure for inspection and certification
- Tunisia is the only country with an organic regulation; Egypt and South Africa are making progress
Asia: The Facts

- Report by Ong Kung Wai of Grolink
- 880,000 hectares, 61,000 farms
- Main producing countries: China, Ukraine, India, Indonesia, Israel
- Biggest market: Japan; emergent markets: China, Malaysia, Philippines, Singapore, Thailand
- Most certification carried out by foreign bodies; own certification bodies in China, Japan, Israel
- China, India, Philippines, Thailand, Malaysia work on organic legislation
Asia: Map of Organic Agriculture

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Report Australia: Darren Halpin and Martin Brückner (Cowan University)
Report New Zealand: Seager Mason (BioGro)

- 10 million hectares; 2000 organic farms
- Growth factor: Overseas demand (Europe); domestic market is small
- Government support because of the export potential
- Australia and New Zealand have both national regulations and are both on the third country list of the EU
Australia / Oceania: Map of Organic Agriculture

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Europe: The Facts

- Report by Toralf Richter and Helga Willer, both FiBL
- European Union: 4.8 million hectares (=3.5 % of area), 140,000 farms
- Europe: 5.7 million hectares, 174,257 farms
- Rapid expansion of the market, market shares up to 4 % (Switzerland)
- Strong government support in most countries through area based payments, research support and through action plans
- The European Action plan should be finalised in the course of 2004
Europe: Map of Organic Agriculture
Latin America: The Facts

- Report by Pipo Lernoud, IFOAM Board of Directors
- 5.8 million hectares, 143,000 organic farms
- High shares of organic land in Costa Rica, Uruguay, Chile, Argentina, Bolivia
- Most of the organic production is exported
- Government support is generally small with the exception of Costa Rica (support for research and teaching), Argentina and Chile (support for exports)
- Support from international agencies for extension and association building
Latin America: Map of Organic Agriculture

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North America: The Facts

- Report by Barbara Haumann of the Organic Trade Association OTA
- 1.5 million hectares, (=0.3 % of agricultural land), 10,500 farms
- Launch of the National Organic Programme (NOP) has triggered market growth in the USA
- Canada has a voluntary standard
- The US market is growing fast and is now bigger than the European market
The study

- Helga Willer and Minou Yussefi (Eds.)

- With contributions by Martin Brueckner (Cowan University), Darren Halpin (Cowan University), Bernward Geier (IFOAM), Barbara Haumann (OTA), Gerald Herrmann (Organic Services), Beate Huber (FiBL), Fred Kalibwani (IFOAM), Pipo Lernoud (IFOAM), Lukas Kilcher (FIBL), Ong Kung Wai (Grolink), Seager Mason (BioGro), Mike Mitschke (SOEL), Nicholas Parrot, Toralf Richter (FiBL), Gunnar Rundgren (Grolink), Amarjit Sahota (Organic Monitor), Otto Schmid (FiBL), Helga Willer (FiBL), Minou Yussefi (SOEL)

EISfOM = European Information System for Organic Markets

Main objective: to develop a framework for collection and processing of reliable and comprehensive data on organic production.

Seminar: Development of European Information Systems for Organic Markets - improving the availability, quality and comparability of statistical data

Berlin, Germany, 26th/27th April 2004

Contributions sought
- on current problems and opportunities for development in organic data collection and processing or
- on issues in international data harmonisation and quality assurance in organic data collection and processing systems

Info www.eisfom.org