

**THE
WORLD OF
ORGANIC AGRICULTURE
STATISTICS AND EMERGING TRENDS 2007**

EDITED BY HELGA WILLER & MINOU YUSSEFI

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Willer, Helga and Minou Youssefi (Eds.) (2007)

The World of Organic Agriculture. Statistics and Emerging Trends 2007. 9th edition, totally revised and updated.
International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany & Research Institute of Organic Agriculture FiBL, Frick, Switzerland
ISBN IFOAM: 3-934055-82-6
ISBN FiBL 978-03736-001-9

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Layout: Helga Willer, FiBL, Frick, Switzerland

Printed on recycled paper by Medienhaus Plump, Rolandsecker Weg 33, 53619 Rheinbreitbach, Germany

Printed copies of this volume may be ordered directly from IFOAM or FiBL or via the IFOAM website at

www.ifoam.org or via the FiBL shop at www.fibl.org/shop/, FiBL order number 1449.

Price: 20 Euros + postage for the printed copy, Download 15 Euros.

Download of the main chapters via www.organic-world.net is free of charge.

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1 Foreword Edition 2007

We herewith present the ninth edition of the study 'The World of Organic Agriculture' documenting current statistics, recent developments and trends in global organic farming. The Foundation Ecology & Agriculture (SOEL), the International Federation of Organic Agriculture Movements (IFOAM) and the Research Institute of Organic Agriculture (FiBL) have been collaborating on this project for several years now, with the support of NürnbergMesse. Since 2000 the latest global organic figures have been presented annually at the BioFach Fair in Nuremberg, of which IFOAM is the patron.

For this edition, the statistical information and all chapters were updated. A new addition is a chapter on organic wild collection which presents the results of a recent survey.

We are very thankful to the authors for contributing in depth information on their continent, their country or their field of expertise.

We are also very grateful to numerous individuals from all over the world, who helped us to compile the global statistical data by providing valuable information.

Particular thanks are due to Dirk Sthamer, who carried out the statistical survey organic agriculture worldwide 2007.

We are also very grateful to Neil Sorensen for the technical editing, for proofreading and for coordinating the production of this book and to the editors Helga Willer and Minou Yussefi for compiling the information.

Many thanks are due to Udo Funke from NürnbergMesse, the organizer of BioFach, who financially supported this as well as earlier editions of this study.

Bonn, Frick, Bad Duerkheim, February 2007

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2 Editors' Note

We would like to express our gratitude to all authors and information providers who have made the publication of this yearbook possible. We think that this product improves with each edition, and this is due to the huge commitment of numerous experts from all over the world.

The next global organic survey will start by mid 2007. We would be very grateful if data - country and crop statistics - could be sent to us, but we will of course also contact all experts.

Should you notice any errors regarding the statistical data in this volume, please let us know; we will then correct the information in our database and use the corrected data for the 2008 edition. Please send any relevant information to helga.willer@fibl.org.

Corrections will be posted at www.organic-world.net. The previous editions of 'The World of Organic Agriculture' can be downloaded [here](#).

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3 Organic Farming Worldwide 2007: Overview & Main Statistics

MINOU YUSSEFI¹ AND HELGA WILLER²

The Foundation Ecology & Agriculture SOEL and the Research Institute of Organic Agriculture FiBL have collected data about organic farming worldwide every year since 1999. Since the publication of the 2003 results, IFOAM has collaborated in the project. In an annual yearbook, the data are published together with articles from experts on the development of organic farming in the continents and on other issues related to the global development of organic farming.

This chapter summarizes the most important facts of the 2007 edition.

Recent Statistics

Organic agriculture is developing rapidly and is now practiced in more than 120 countries of the world. Its share of agricultural land and farms continues to grow in many countries. Furthermore, it can reasonably be assumed that uncertified organic farming is practiced in even more countries.

According to the latest survey on organic farming worldwide, almost 31 million hectares are currently managed organically by at least 633'891 farms. This constitutes 0.7 percent of the agricultural land of the countries covered by the survey (see chapter on the main results of the global organic survey 2007 and corresponding tables in the annex).

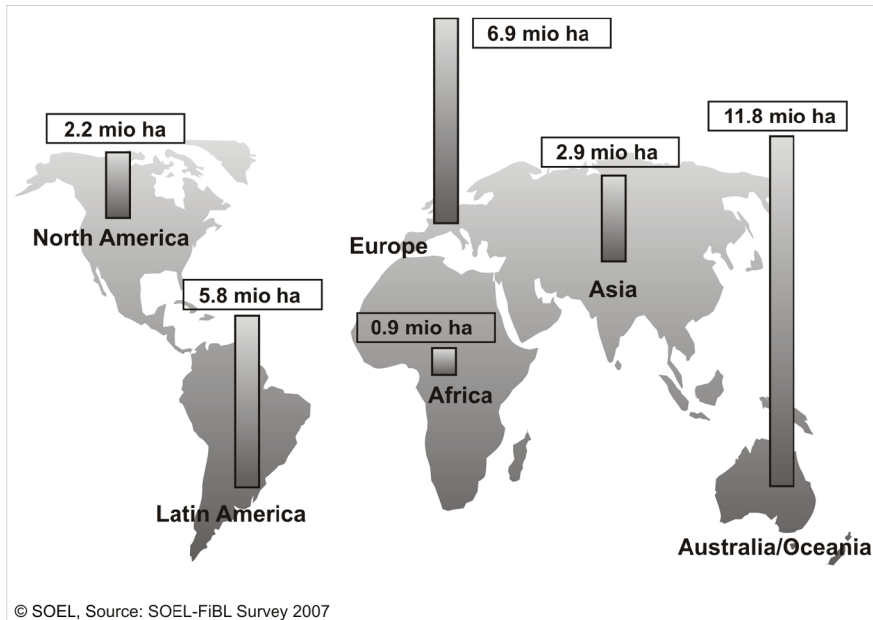
In total, Oceania holds 39 percent of the world's organic land, followed by Europe (23 percent) and Latin America (19 percent).

Currently, the countries with the greatest organic areas are Australia (11.8 million hectares), Argentina (3.1 million hectares), China (2.3 million hectares) and the US (1.6 million hectares). The number of farms and the proportion of organically compared to conventionally managed land, however, is highest in Europe.

There has been major growth of organic land in North America and in Europe; both continents have, compared to the end 2004, half a million hectares more each. In North America, this constitutes an increase of almost 30 percent, representing an exceptional growth. In most countries organic farming is on the rise; there have, however also been decreases of organic land (extensive pastoral land) in China, Chile and Australia.

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Map 1: Organic agriculture worldwide

Source: SOEL-FiBL Survey 2007, Graph: Minou Yussefi, SOEL

The global survey on organic agriculture also contains information on the main land uses and the importance of some crops in a global context. For 90 percent of the organic land, at least some information on its uses was available. Data, though still quite incomplete, show, for instance, that the number one country for organic citrus fruit production is Italy; that Mexico is the biggest organic coffee producer or that the Dominican Republic is a major producer of organic cocoa. The leaders in organic grape production are Italy, Spain and France. Italy, Spain and Tunisia have the largest areas of organic olives.

Wild collection

In 2005, the International Trade Centre ITC and Organic Services carried out the study 'Overview of production and marketing of organic wild products'. This study shows registered areas of about 62 million hectares of organic wild collection, and a total number of 979 organic wild collection projects. The largest collection areas are in Europe and Africa (almost 27 million hectares each). In terms of quantities, the following products are the most important: bamboo shoots amount to 36 percent of the quantities collected, followed by fruits and berries (21 percent) and by nuts (19 percent) (see chapter on wild collection by Udo Censkowsky and Uli Helberg).

For the global statistics, this adds another 62 million hectares to the 30.6 million hectares of organic agricultural land.

Market

Global sales of organic food and drink have increased by 43 percent from 23 billion US-Dollars (17.8 billion Euros¹) in 2002 with sales reaching 33 billion US-Dollars (25.5 billion Euros) in 2005. Organic Monitor expects sales to have approached 40 billion US-Dollars (30.9 billion Euros) in 2006. Although organic agriculture is now present in most parts of the globe, demand remains concentrated in Europe and North America. The two regions are experiencing undersupply because production is not meeting demand. Thus, large volumes of imports are coming in from other regions (see chapter on the global market by Amarjit Sahota).

Standards & Regulations

2006 was a very dynamic year concerning the development of a legal framework for organic production in the world: for example, Canada and Paraguay passed legislation, and others elaborated drafts or revised existing legislation. The revision process of EU regulation 2092/91 on organic agriculture, however, received the most international attention in 2006. The process began at the end of 2005, and was almost finalized in December 2006 when the European Agriculture and Fisheries Council agreed on the outline of the new organic regulation. The final decision is expected in the spring of 2007. Currently more than 60 countries have a regulation (see chapter on standards and regulations by Beate Huber, Lukas Kilcher and Otto Schmid).

Certification & Accreditation

Today, 395 organizations worldwide offer organic certification services. Most certification bodies are in Europe (160), followed by Asia (93) and North America (80). The countries with the most certification bodies are the US, Japan, China and Germany. Many of the certification organizations also operate outside of their home country. 40 percent of the certification bodies are approved by the European Union, 32 percent have ISO 65 accreditation, and 28 percent are accredited under the US National Organic Program.

Lacking acceptance and recognition between the different certification and accreditation systems can contradict the objective of enhancing trade, market development and fostering confidence. An important initiative for international harmonization is the IFOAM Accreditation Program, which assesses certification bodies against the IFOAM norms. Currently 32 certification bodies operating in over 70 countries around the world have voluntarily submitted themselves to the IFOAM accreditation process. A recent development is the International Task Force on Harmonization and Equivalence in Organic Agriculture (ITF) aiming at a general consensus on harmonizing private with government and government with government standards/regulations (see chapter on certification and accreditation by Gerald Herrmann and Gunnar Rundgren).

¹ Exchange rate as of January 2007

Organic Agriculture by Continent

Africa

In Africa, organic production is rarely certified, and for many countries new figures were not available. Nevertheless, organic farming is increasing in Africa, especially in southern countries. An important growth factor in Africa is the demand for organic products in industrialized countries. Another motivation is the maintenance and building of soil fertility on land threatened by degradation and erosion.

Especially in poorer countries, organic agriculture can contribute to meaningful socio-economic and ecologically sustainable development. This is in part due to the application of organic principles, which translates into efficient management of local resources and therefore cost-effectiveness. Additionally, the market for organic products – at both the local and international level – has good prospects for growth and offers creative producers and exporters in the South excellent opportunities to improve their income and living conditions. Especially in the tropics, organic production reduces the risk of yield failure and stabilizes returns, thereby enhancing food security for small farmers' families. In the arid tropics, organically managed dry land soils have a greater potential for countering soil degradation and desertification, resilience to both water stress and nutrient loss are built into the system. (see chapter on sustainable development of Lukas Kilcher).

In Africa, almost 900'000 hectares are now managed and certified organic. With a few exceptions (notably Egypt and South Africa), the African market for organic produce is very small. This is due both to low-income levels and to an undeveloped infrastructure for inspection and certification. Most certified organic production in Africa is geared towards export markets, with the large majority being exported to the EU, Africa's largest market for agricultural produce.

There is a strong NGO interest in organic farming, because it is about making farming more sustainable and improving food security. There is also commercial interest in organics as it represents an interesting niche market, with a significant earning potential. The interest from governments, however, lags behind. At present Tunisia is the only African country with its own organic (EU compatible) standards, certification and inspection system. Egypt and South Africa have both made significant progress in this direction, and Kenya, Uganda and Tanzania are soon to follow. Those countries are well on the way to developing standards, and private certification organizations have been established there. Morocco, Ghana and Zambia have made some progress in developing their own standards (see chapter on Africa by Bo van Elzakker, Nicolas Parrott, Marjorie Chola Chonya, and Sam Adimado).

Asia

The total organic area in Asia is almost 2.9 million hectares, managed by almost 130'000 farms. For many countries there are still no precise figures available, but some countries, in which data were not previously recorded, now have statistical information available.

The majority of activities and development in the region is occurring without market regulation and certification. Organic rules have already been established in a number of Asian countries, including India, Japan, Korea, Philippines, Taiwan and Thailand. Organic rules tend to be mandatory in importing countries and voluntary in exporting countries. Only Israel and now India have attained equivalency status with the EU regulation (see chapter on Asia by Ong Kung Wai).

Australia/Oceania

This area includes Australia and New Zealand as well as smaller countries like Fiji, Papua New Guinea, Tonga and Vanuatu. Altogether, more than 11.8 million hectares and 2'689 farms are under organic management here. Most of this area is pastoral land for low intensity grazing in Australia. Important products in Australia include grains, fruit and vegetables, which are produced all year around, wine, dairy products, beef and sheep (both meat and wool) and herbs. In New Zealand, the main types of organic primary production are kiwifruit, apples, blueberries, fresh and processed vegetables, dairy, meat, viticulture, and aquaculture.

Growth in the organic industry in Australia has been strongly influenced by rapidly growing overseas demand. The key market for export of Australian organic products has changed over the years. In the early 2000s, it was Europe accounting for over 70 percent of Australian organic exports. Other countries such as Japan, USA, Singapore and Hong Kong were emerging as promising future export markets for Australian produce. For beef in particular, the USA is becoming an important export destination.

There is some government support to encourage organic agriculture per se. However, there are no subsidies for organic agriculture, neither in Australia nor in New Zealand. Australia has had national standards for organic and biodynamic products in place since 1992, and it is one of the countries on the third country list of the European Union - as is New Zealand. While these standards are only enforced for export products, they have acted as an informal standard domestically, though the term 'organic' was not legally protected in the domestic market place. However, in 2006 Standards Australia agreed to adopt organic standards which, once in place, can then be used by authorities to enforce on the domestic market. In New Zealand a National Organic Standard was launched in 2003, underpinning the various certification schemes that already exist. Through the launch of the New Zealand Organic Sector Strategy, there is Government acknowledgement of the importance of organics, but still only limited Government support.

While trends of rising consumer demand for organics are becoming discernible, the organic food market in Australia is still considered a niche market. On the domestic market, organic produce receives a substantial price premium over that of conventionally grown produce. Imported products are not only food and drinks, of which more than half is processed, primarily from New Zealand, the USA and the UK. Increasingly non-edible items such as cotton and personal care products are imported (see chapter on Australia/Oceania by Els Wynen and Seager Mason).

Europe

Since the beginning of the 1990s, organic farming has rapidly developed in almost all European countries. As of the end of 2005, 6.9 million hectares in Europe were managed organically by almost 190'000 farms. In the European Union, almost 6.3 million hectares are under organic management, and there are almost 160'000 organic farms. This constitutes 3.9 percent of the agricultural area. The country with the highest number of farms and the largest organic area is Italy.

Compared to the previous survey (as of December 2004), organic land increased by almost 510'000 hectares (+8 percent) in Europe as a whole and by 490'000 hectares (+ 8.5 percent) in the European Union. The increase in the EU is due to high growth rates in the new member states (for instance Lithuania and Poland) as well as substantial increases in Italy and Spain. Support for organic farming in the European Union includes grants under the European Union's rural development programs, legal protection under the recently revised EU regulation on organic farming (since 1992) and the launch of the European Action Plan on Organic Food and Farming in June 2004. Countries that are not EU members have similar support.

The European market is estimated to be between 13 and 14 billion Euros (2005). The biggest market for organic products is Germany with an annual turnover of 3.9 billion Euros, followed by Italy (2.4 billion Euros) and by France (2.2 billion Euros). The highest market share of organic products of the total market is in Switzerland with 4.5 percent, and the highest per capita consumption is also in that country with more than 100 Euros spent on organic food per year and citizen. Growth of the European market compared to the previous year is around ten percent. Some countries are currently experiencing a shortage of supply (see chapter on organic farming in Europe by Helga Willer, Toralf Richter and Susanne Padel).

Latin America

In Latin America many countries have more than 100'000 hectares of organic land, and having started from a comparatively low level, there have been extraordinary growth rates in the previous years. The total organically managed and certified area is now 5.8 million hectares. Almost all Latin American countries have an organic sector, though the level of development varies widely. The countries with the highest proportion of organic land are Uruguay, Mexico and Argentina. A major part of the 3.1 million organic hectares in Argentina are extensive grassland.

In general, the organic movement in Latin America has grown through its own efforts. No government provides direct subsidies or economic aid for organic production. There are, however, exceptions:

In Brazil, the government issued an inter-ministerial Pro Organic Plan, officially stimulating organic production, research, association building, marketing and trade. In Bolivia an action plan for the 'Promotion of the development of ecological production and establishment for a national control system' was recently launched. Costa Rica and some others have official funding for research and teaching, Argentina and Chile have had official export agencies helping producers attend international fairs and print product catalogues, and in Mexico there is a growing interest from national and state agencies. In places there has been seed funding for extension and association building from international aid agencies, especially from Germany, the Netherlands and Switzerland.

Export is still the main organic activity in Latin America. From the coffee grains and bananas of Central America, to the sugar in Paraguay and the cereals and meat in Argentina, the trade of organic produce has been mostly oriented towards foreign markets (see chapter on Latin America by Pipo Lernoud).

North America

In North America almost 2.2 million hectares are managed organically, representing approximately a 0.6 percent share of the total agricultural area. Currently, the number of farms is about 12'000. Compared to the other continents North America had the highest growth of organic land: The organic land area increased by almost thirty percent.

With the US national rule in place, the organic sector has been able to provide a guarantee to consumers that those organic products using the new labeling mean that specific practices were followed. The US market has seen more and more organic products being introduced, the number of certification agencies accredited by USDA has grown, and talks are progressing to expedite international trade of organic products.

Since 1999, the Canadian industry has had a voluntary Canada Organic Standard that is not supported by regulation. The organic industry continues to devote its energies toward implementation of a mandatory national organic regulation to help expedite trade relations with such major trading partners as the United States, European Union, and Japan.

Valued at about 14.9 billion US-Dollars (11.5 billion Euros) in 2005, the North American market accounted for 45 percent of global revenues. A large increase in organic farmland and organic food production in the US could make it the largest exporter of organic products. Growing consumer demand for healthy & nutritious foods and increasing distribution in conventional grocery channels are the major drivers of market growth (see chapter on organic farming in North America by Barbara Haumann).

Developments within IFOAM

For IFOAM, which unites the organic movement worldwide, 2006 proved to be another outstanding year.

Several important milestones were achieved, including: the establishment of the Organic Certification Body Forum that aims to increase cooperation and communication between certification bodies worldwide; the launch of a joint project to facilitate the development of East Africa Standards with the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Environment Program (UNEP); and a joint project with the International Fund of Development IFAD called 'Building Capacities on Certification of Organic Agriculture in the Pacific'.

IFOAM also organized three major international conferences in 2006 to offer a platform for interested and engaged people in the organic movement: the IFOAM International Conference on Organic Wild Production, the IFOAM International Conference on Animals in Organic Production and the IFOAM Conference on Organic Certification. Various other positive developments and events in 2006 have provided IFOAM with the confidence and energy to continue leading the organic movement.

A highlight in 2007 will be the international conference on organic agriculture and food security, to be held at the headquarters of the Food and Agriculture Organization of the United Nations (FAO) in Rome, Italy. The FAO invited IFOAM to organize this conference in collaboration with the World Wildlife Fund (WWF), the Third World Network (TWN) and the Rural Advancement Foundation International (RAFI).

IFOAM is confident that the current challenges will turn out to be opportunities for new developments, from which the whole organic industry, in all its different settings and diverse localities, can profit (see chapter 18 by Angela B. Caudle and Gabriele Holtmann).

4 The Global Survey on Organic Farming 2007: Contacts, Data Sources, Data Processing

Contacts and data sources

DIRK STHAMER¹

The SOEL-FiBL survey on global organic farming was undertaken between September 2006 and January 2007. For the second time the survey includes information on land use patterns.

Contacts and information resources

Various information sources were used. Most of the data were supplied through national contact persons. We aimed to use the same contacts as for the 2006 survey. A detailed description of how these contacts were found is available in the 2006 edition of 'The World of Organic Agriculture' (Baraibar 2006). However, not all contacts responded, and as a result new contacts had to be found for some countries. For a complete list of who provided data, see the tables in the continent chapters. See also the chapter on information resources for details on the resources listed below.

The contacts and information sources can be classified as follows:

- Members of the International Federation of Organic Agriculture Movements (IFOAM), Bonn, Germany, www.ifoam.org
- National and international certification bodies
- Eurostat, the Statistical Office of the European Union, Luxembourg, Data sets organic farming
- Data from agricultural ministries
- Contacts and data provided by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, EkoConnect, Dresden, Germany, the Mediterranean Agricultural Institute IAMB, Bari, Italy and other institutions with good networks.
- Organic Agriculture Information Management System (Organic-AIMS) of the Food and Agriculture Organization FAO, Rome, Italy, www.fao.org/organicag/frame6-e.htm

¹ Dirk Sthamer carried out the SOEL-FiBL survey 2007 at Foundation Ecology & Agriculture SOEL. Contact is via SOEL, Weinstrasse Sued 51, D-67098 Bad Dürkheim, www.soel.de

Scope of the survey: countries and land use information covered

192 countries are part of the United Nations¹. If Vatican City, Hong Kong, Palestine, Taiwan and Western Sahara are included, the total is 197 countries². Of these, 133 could be contacted, and 106 provided new data (from December 31, 2005). For countries that could not be contacted (17), older data was used. For 74 countries, no data at all were available. As a result, the survey covered 63 percent of all countries (see table below).

Table 1: Percentage of countries by continent that answered the survey

	Number of countries that provided new data (31.12.2005)	Number of countries for which older data are available	Number of countries with data on organic agriculture	Number of countries with no information	Total countries	Percent of countries that provided data
Africa	21	3	24	32	56	43%
Asia	25	6	31	18	49	63%
Australia/Oceania	3	-	3	9	12	25%
Europe	39	1	40	5	45	89%
Latin America	16	7	23	10	33	70%
North America	2	-	2	0	02	100%
Total	106	17	123	74	197	63%

- Australia/Oceania: Three of the twelve countries were covered. The nine countries that did not provide data are small islands.
- In Africa, data collection remains difficult. The availability and quality of information is improving in many countries, but this cannot be said for all countries, as many suffer from unstable political situations.
- Asia: More than 60 percent of the Asian countries answered the survey, and new countries like Cambodia and East Timor were included for the first time.
- Europe: Almost 90 percent of the European countries are covered by the survey. In Europe, most agricultural ministries collect and provide data on organic farming. Furthermore, the Eurostat database is a helpful tool in terms of data collection on organic farming. Countries that did not answer were Belarus, San Marino, Andorra, Monaco and Vatican City. Apart from Belarus, agriculture is of only little importance in these countries.
- Latin America: 70 percent of the countries in Latin America were covered by the survey, with Argentina and Brazil being the largest.
- North America: the United States and Canada supplied very good data, including breakdowns of land use patterns.

¹ United Nations, List of Member States, The UN Homepage, www.un.org/Overview/unmember.html

² Vatican City is observer country of the UN; Palestine and Western Sahara are recognized by many countries as sovereign but not de facto as independent; Hong Kong is special administrative region of the People's Republic of China (listed as we received separate data), Taiwan is not recognized by the UN.

Classification of land use data

BARBARA BARAIBAR¹ AND HELGA WILLER²

Classification of data

For the data collected under the 2007 global survey, the classification system developed for the 2006 survey was used, but slightly modified. When the 2006 survey began, FiBL did not yet have a classification system, as it was not known what kind of data would be available, if any (Baraibar 2006). As the data were collected, a classification system was developed according to the kind of data received. FiBL and SOEL are planning to improve the classification system and to ultimately bring it in line with classification systems that are currently being developed for organic farming.

As with the 2006 survey (Baraibar 2006), the following problems were found³:

- Standardization on a world level is lacking, and data is seldom comparable between countries, even though availability and quality of the statistics have improved in many countries.
- The perception of agriculture in different countries generated a huge variety of ways to provide the information, and aggregation levels vary significantly.
- Other ranking problems occurred when trying to classify a crop used in differing ways around the world (e.g. flax can be an industrial crop used for fiber or an oilseed).

The FAO statistical system

For this survey, the general FAO classification system for main land uses⁴ was utilized with slight modifications. Five main levels were used to classify the land use and crop data: arable land, permanent crops, permanent pastures/grassland, other crops and other. Wild collection was not included into the general survey, even though the data were stored when available.

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³ As described by Baraibar (2006) organic data collection, processing and classification on a global level are not yet as developed as for agriculture in general. In spite of the dynamic growth of organic farming in many countries, most existing systems for agricultural statistics do not include organic agriculture figures. Many efforts, however, are currently being made – for instance by the FAO (Mayo 2004) or by Eurostat – to build a standardized system that will finally make it possible to have high quality, easily accessible and comparable statistical information. Another current activity is the European funded project European Information System for Organic Markets (EISFOM), aiming to develop a framework for the collection and processing of reliable and comprehensive data on organic production and markets (Rippin et al. 2006).

⁴ This system is used for instance by Faostat to classify land use data and can be found at FAOSTAT (<http://faostat.fao.org/>) > Archives > Land use and irrigation <http://faostat.fao.org/site/418/default.aspx>, download of January 7, 2007

The main land use categories from the FAO were modified for the global organic survey as follows¹:

- **Arable Land**

Land under temporary crops, temporary meadows for mowing or pasture, land under market and kitchen gardens and temporarily fallow land (less than five years). Abandoned land resulting from shifting cultivation is not included in this category. Data for 'Arable land' are not meant to indicate the amount of land that is potentially cultivable.

- **Permanent Crops**

Land cultivated with crops that occupy the land for long periods and need not to be replanted after each harvest, such as cocoa, coffee and rubber. This category includes land under flowering shrubs, fruit trees, nut trees and vines, but excludes land with trees grown for wood or timber.

- **Permanent Pasture**

Land used permanently (five years or more) for herbaceous forage crops, either cultivated or growing wild (wild prairie or grazing land).

- **Other crops (FAO: Non-arable and permanent crops')**

This category was used for crops that did not fit into the other categories or for which details were not known. For this survey, the category was also used when crops of the arable and the permanent crop category had been put into one group by the data suppliers (e.g. olives and annual oil crops).

- **Other**

The FAO has a category 'Forest and Woodland'. In this survey, forest, aquaculture and the unutilized land categories were all grouped under 'Other'.

- **No information**

This category covers land for which no details were available.

Data Storage and classification

The huge amount of information gathered was entered into a database created for this purpose. The data was entered into this database at three levels:

1. Main category (arable land, permanent crops, permanent pastures/grassland, other crops, other). The main categories have already been explained (see above).

2. Crop category (main crop groups like cereals)

This second category was used to classify the main groups of crops within each main category. Because the information provided was very different from one country to another, this classification level aims to include the most important crop groups all over the world.

3. Crop (individual crops)

This last category includes specific crops grown organically around the world. They can be as specific as 'maize for silage' and general as 'greenhouse cultivated vegetables'.

¹ See FAOSTAT homepage at <http://faostat.fao.org/> > Metadata > Concepts and definitions > Methodology (search) > 'Land use' at <http://faostat.fao.org/site/362/default.aspx>, download of January 7, 2007

The classification used for the data gathered in the survey is below. The fact that a crop is not included in this table does not mean that it is not grown organically, but that no specific data it was received.

Arable land

- Cereals
Ajonjoli, amaranth, barley, buckwheat, emmer wheat, grain maize, oats, rice, rye, quinoa, sorghum, spelt wheat, triticale, wheat, other cereals
- Field fodder growing
Feed legumes, Lucerne (Medicago), maize for silage, maslin (mixed cultivation of either different cereals or mixed cultivation of cereals and pulses), temporary grassland, other field fodder growing
- Flowers and ornamental plants
Roses, tagetes, other flowers and ornamental plants
- Medicinal and aromatic plants and spices,
Aloe Vera (Sabila), black pepper, caraway, citronella, chamomile, geranium, ginger, herbs for essential oil, lavender, leaf herbs, lemongrass, patchouli, sienna pods, ververt
- Industrial crops
Cotton, flax, hemp, jojoba, other industrial crops
- Oilseeds
Mani (*Arachis hypogaea*), pumpkin seeds, rape and turnip rape, safflower seeds, sesame seeds, sunflower seeds
- Vegetables
Brussel sprouts, cabbage, carrot, garlic, greenhouse cultivation, onion, parsley, pepper, Savoy cabbage, other vegetables, tomatoes
- Root crops
Fodder roots and brassicas, potatoes, sugar beets, other root crops
- Protein crops
Beans, legumes, peas, pulses, soy, other protein crops
- Other arable crops
Chile, 'esponja' (*Luffa acutangula*), jamaica, tobacco, panela, other arable crops
- Seed production
Seeds and seedlings
- Set-a-side/ green manuring

Permanent crops

- Fruits and nuts
Almonds, apples, apricots, blackberry, blueberry, carob trees, cherries, chestnut, citrus, lemon, fig, hazelnut, nuts, peach, pear, peanuts, pecano (*Carya illinoensis*), pimberrien, plum, pomegranate, raspberry, sour cherry, strawberries, walnut kernel, other fruits and nuts
- Grapes
Grapes, sultanas, currants
- Olives
- Coffee
Coffee and coffee associated with other crops
- Cocoa

- Sugarcane

- Tropical fruits

Araza or Amazon peach (*Eugenia stipitata*), avocado, banana, cactus, coconut, dates, guava, guineo, jocote (*Spondia Purpurea* L), litchi, mamey (*Mammea americana* L), mango, 'marañon' (*Anacardium occidentale* L), 'nanche' (*Byrsonima crassifolia*), orito (*Musa acuminata*), papaya, passion fruit, pineapple, pitaya (*Hilocereus undatus*).

- Permanent crops

Various Hops, guar gum, gum Arabic, hibiscus, kiwi, kaki, macadamia, neem (*Azadirachta indica*), palm oil, palmito (*Bactris gasipaes* Kunth), vanilla, yucca, Other permanent crops

- Tea

Other crops

- Unknown/mixed, e.g. permanent crops and arable crops together.

Permanent pastures

- Permanent pastures, permanent meadows

Other

- Unutilized land, forest, aquaculture

Further Reading

Baraibar, Bárbara (2006): Contacts and Data Sources. In: Willer/Yussefi (Eds.) *The World of Organic Agriculture 2006*, International Federation of Organic Agriculture Movements, Bonn, Germany and Research Institute of Organic Agriculture FiBL, Frick, Switzerland

Baraibar, Bárbara (2006): Data Collection and Processing. In: Willer/Yussefi (Eds.) *The World of Organic Agriculture 2006*, International Federation of Organic Agriculture Movements, Bonn, Germany and Research Institute of Organic Agriculture FiBL, Frick, Switzerland

Mayo, Robert (2004): Organic agricultural statistics and information at the United Nations Food and Agriculture Organization: initiatives, opportunities and challenges. In: Recke, Guido; Willer, Helga; Lampkin, Nic and Vaughan, Alison, Eds. (2004) *Development of a European Information System for Organic Markets - Improving the Scope and Quality of Statistical Data*. Proceedings of the 1st EISFOM European Seminar, held in Berlin, Germany, 26-27 April 2004. FiBL-Report. Research Institute of Organic Agriculture (FiBL), CH-Frick. <http://orgprints.org/2935/>

Rippin, Markus; Vitulano, Susanna; Zanolli, Raffaele and Lampkin, Nicolas (2006) *Synthesis and final recommendations on the development of a European Information System for Organic Markets*. = Deliverable D6 of the European Project EISFOM QLK5-2002-02400. Report, Institute of Rural Sciences, University of Wales. <http://orgprints.org/8961/>

Rippin, Markus (2006) *Classification List for Land Use and Livestock Data*. Zentrale Markt- und Preisberichtsstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH, DE-Bonn. <http://orgprints.org/9109/>

Rippin, Markus; Willer, Helga; Lampkin, Nicolas and Vaughan, Alison, Eds. (2006) *Towards a European Framework for Organic Market Information*. Proceedings of the Second EISFOM European Seminar, Brussels, November 10 & 11, 2005. Research Institute of Organic Agriculture FiBL, Frick, Switzerland. <http://orgprints.org/6054/>

5 The Global Survey on Organic Farming 2007: Main Results

HELGA WILLER¹, MINOU YUSSEFI², DIRK STHAMER³

In this chapter, we present the main results of the 2007 global survey on organic land area, land use and organic farms carried out by SOEL and FiBL

Presentation of the statistics in this book

The statistics compiled under the 2007 survey can be found at various places in this book.

The general global statistics, including information on land area and farms and an overview of the general land use and some crop details, are available in *this chapter*:

- Organic land area and organic farms by continent.
- Share of organic land of the continents' agricultural area.
- Statistical information on main land uses (arable crops, permanent crops, permanent pastures, other) globally.
- Global statistics on the main arable and permanent crop categories.
- Statistical information on main land uses in the continents.
- Some crop statistics: Graphs showing the main countries for the production of cereals, citrus fruits, coffee, cocoa, cotton, grapes, rice, olives, wheat. Detailed information on some crops is available in the 2006 edition of 'The World of Organic Agriculture' (Willer/Yussefi 2006): Cocoa (Garibay 2006), coffee and cotton (Baraibar 2006) as well as grapes (Geier 2006).

In the *continent chapters* of this book, the following results of the global organic survey are available:

- Land area, share of total agricultural area and farms by country.
- Information and data sources for the country data. These sources refer to all country related data including land use and crop data.

In the *annex*, the results of the global survey on organic farming are presented in full detail:

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³ Dirk Sthamer carried out the SOEL-FiBL survey 2007 at, Foundation Ecology & Agriculture SOEL. Contact is via SOEL, Weinstrasse Sued 51, D-67098 Bad Dürkheim, www.soel.de

- Country list with information on land under organic management, share of organic of agricultural land and numbers of farms.
- Country list with land under organic management, sorted by global importance.
- Country list with information on share of organic of agricultural land, sorted by global importance.
- Country list with information on numbers of farms, sorted by global importance.
- Country list with land use and crop details. Global organic land use by main crop categories.

Developments at a global level

According to the 2007 survey¹, almost 31 million hectares are currently managed organically by more than 600'000 farms worldwide. This constitutes 0.7 percent of the agricultural land of the countries covered by the survey.

The continent with most organic land is Australia/Oceania with almost 11.9 million hectares, followed by Europe with almost 7 million hectares, Latin America (5.8 million hectares), Asia (almost 2.9 million hectares), North America (2.2 million hectares) and Africa (almost 0.9 million hectares).

On a continent level, the share of organic land in proportion to all agricultural land is highest in Australia/Oceania (2.6 percent), followed by Europe. It should be noted, though, that some countries in Europe exhibit a much higher percentage; some countries have reached shares of more than ten percent of agricultural land (Austria, Switzerland). In the European Union, the share of organic land is almost four percent.

Table 2: Organic land and farms by continent

Continent	Organic land area (hectares)	Share of total agricultural area	Organic farms
Africa	890'504	0.11%	124'805
Asia	2'893'572	0.21%	129'927
Europe	6'920'462	1.38%	187'697
Latin America	5'809'320	0.93%	176'710
North America	2'199'225	0.56%	12'063
Oceania	11'845'100	2.59%	2'689
Total	30'558'183	0.74%	633'891

Source: SOEL-FiBL Survey 2007

¹ For reasons of statistical consistency we aimed to obtain the data as of December 31, 2005, for the 2007 survey, whereas in previous years we had tried to get the latest data available. For some countries the data as of mid 2006 would have already been available. On the other hand, for many countries the 2005 data were not yet available. In those cases we used the data of the previous surveys.

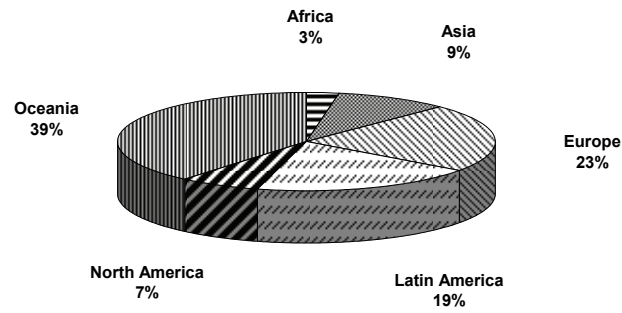


Figure 1: Distribution of global organic land by continent

Source: SOEL-FiBL Survey 2007

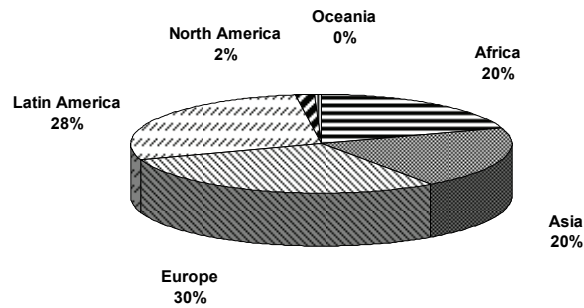


Figure 2: Distribution of organic farms by continent

Source: SOEL-FiBL Survey 2007

In most of the countries that provided new data, there has been an increase of organic land. The two continents of Europe and North America gained approximately half a million hectares each. This corresponds to an increase of 8 percent in Europe and of 29 percent in North America, representing exceptional growth.

Developments at a country level

Like in previous years, Australia is the country with most organic land. Number two is currently Argentina, which had an increase of 300'000 hectares, followed China. Major increases of organic land in the United States have made this country the new number four, followed by Italy. The top 10 countries have 23.7 million hectares together, thus constituting more than three quarters of the world's organic land. In the annex a table with all countries and their organic land, sorted by organic land area is available.

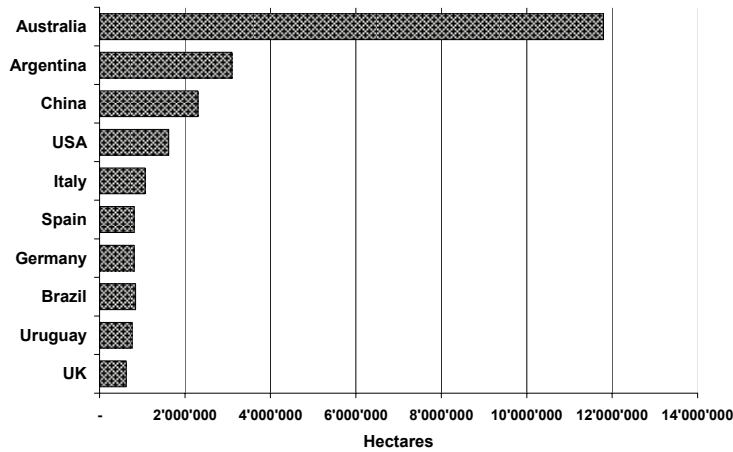


Figure 3: The ten countries with most organic land

Source: SOEL-FiBL-Survey 2007

In more than 60 countries covered by the survey, organic land has increased since the previous survey. Prominent examples are the United States (+400'000 hectares), Argentina (+300'000 hectares), Italy (+110'000 hectares) and Canada (+90'000 hectares). The top ten countries regarding increase of organic land in hectares had a growth of 1.2 million hectares. The highest relative increases were in several countries of Central and Eastern Europe (Latvia, Poland and Lithuania), but also in other countries (Italy, United States).

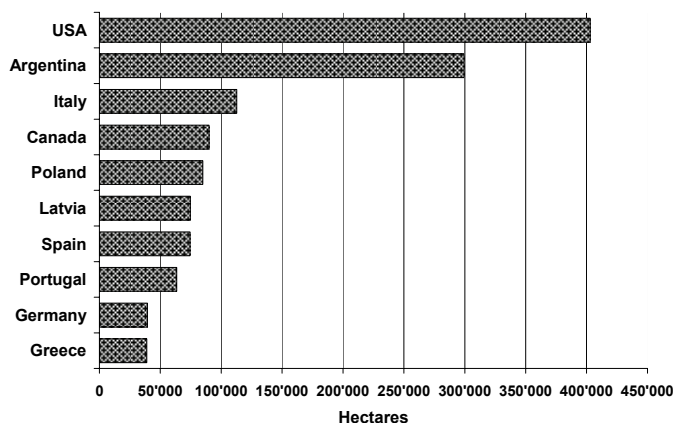


Figure 4: The ten countries with the highest increase of organic land area (hectares) according to SOEL-FiBL surveys 2006 and 2007

Sources: SOEL-FiBL surveys 2006 and 2007

It is also important to look at the share of organic land. The graph of the ten countries with the highest share of organic land shows that, with the exception of East Timor, the shares of organic land of the total agricultural area are highest in Europe.

The total agricultural land (as of 2003) for most countries was taken from the FAO Statistical database FAOSTAT¹. For the European Union, most data (as of 2005) were taken from Eurostat². Where available, we used the data for total agricultural land from ministries (US, Switzerland, and Austria). Please note that in some cases the calculation of the shares of organic land and farms based on the Eurostat and FAOSTAT data might differ from the organic shares communicated by the Ministries or experts.

In the annex, a table with all countries sorted by share of organic land is available.

¹ FAOSTAT, Data Archives, the FAO Homepage, FAO, Rome at faostat.fao.org > Data Archives > Land > Land Use; <http://faostat.fao.org/site/418/DesktopDefault.aspx?PageID=418>

² Eurostat, Agriculture & Fisheries Data, The Eurostat Homepage, Eurostat, Luxembourg, at ec.europa.eu/eurostat/ > Themes: Agriculture and Fisheries > Data > Agriculture, forestry and fisheries > Agriculture > Structure of agricultural holdings > Results of the farm structure surveys from 1990 onwards > General overview by area status > Key variables by region, agricultural area size classes and legal status; http://epp.eurostat.ec.europa.eu/portal/page?_pageid=0,1136206,0_45570467&_dad=portal&_schema=PORTAL

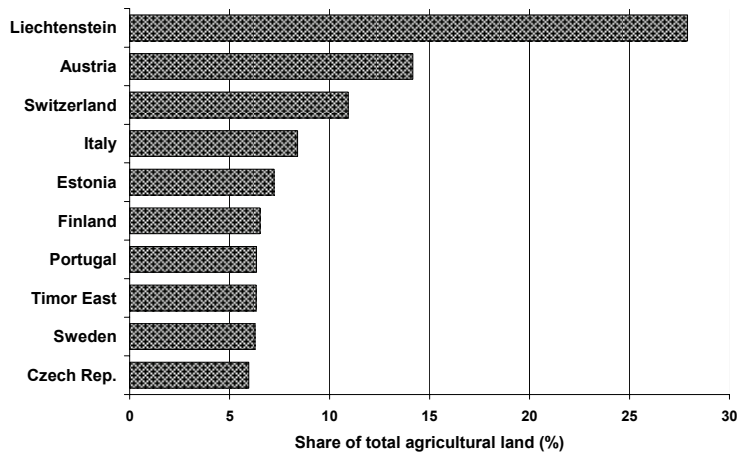


Figure 5: The ten countries with the highest share of organic land

Source: SOEL-FiBL survey 2007

As to the number of farms, the figures presented here have to be treated with caution, because in some countries only the number of enterprises, not the total number of farms, was included; some enterprises consist of many smallholder farms. Within the scope of this survey, it was not possible to discern the details.

According to the data obtained, the greatest number of farms is in Mexico, followed by Uganda, Italy and Sri Lanka. The small number of farms compared to the organic area in Australia is due to the fact that many farms are extensive sheep grazing farms. The figure for China – again small compared to the organic land - shows the number of enterprises but not the households involved in organic farming.

A table in the annex shows the countries of the world sorted by number of organic farms.

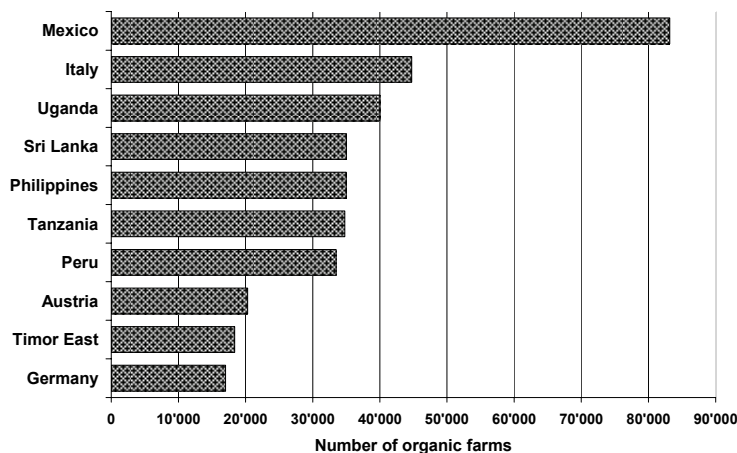


Figure 6: The ten countries with the highest number of organic farms

Source: SOEL-FIBL survey 2007

Results of the land use survey 2007

Data depth

When interpreting the following data, it should always be kept in mind that detailed information on land use was not available for all countries. This means that the information presented below is far from being complete, and with the available data, the following has to be considered:

- The depth of information may differ: For some countries, only information on the main uses (arable crops, permanent crops, and permanent grassland) was available. For Australia, for instance, only permanent grassland data were available. For other countries, very detailed statistical land use information can be found; the Danish statistics list each vegetable type.
- Aggregation: In order to make data accessible the data are aggregated in many statistics. This means various crops have been put together into one group. For instance, Spain combines cereals and leguminous crops, and it is thus impossible to have a figure solely for cereals. In such cases the data available have to be classified as 'other arable crops'. In cases where arable and permanent crops were mixed, the category 'other crops' was used. As a result, a lot of information was lost due to the inability to obtain a precise breakdown of the data.
- For some countries, no land use information was available at all.

Global land use

Compared to the previous survey, more land use information was available. In the 2006 survey, land use details were available for more than 16 million hectares; for the 2007 survey, land use information was available for 27 million hectares, 90 percent of organic land. It should be noted, however, that this does not mean that detailed crop information is available for every country (see table in the annex).

The table on the main land use categories and crop categories shows that more than half of the organic agricultural land for which land use information was available is used for permanent pastures/grassland. About one quarter is used for arable cropping, almost ten percent for permanent crops, followed by other crops and other land.

Table 3: Global organic land by main land use categories

Main category	Hectares
Arable land	4'156'754
Other	289'379
Other crops	1'550'272
Permanent crops	1'393'595
Permanent pastures/grassland	19'939'796
No information	3'228'387
Total	30'558'183

Source: SOEL-FiBL survey 2007

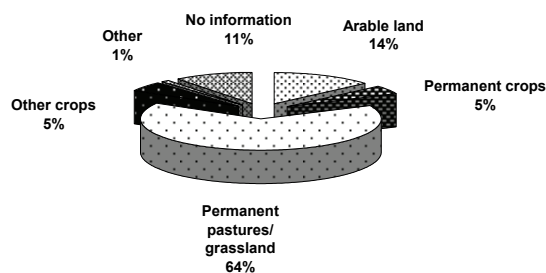


Figure 7: Global organic land use: Global organic land use, including share of land for which no information was available

Source: SOEL-FiBL survey 2007

Arable land

On a global level, arable land accounts for more than one quarter of the organic agricultural land for which information was available – a total of 4.1 million hectares of organic arable land was covered by this survey. Most of the world’s organic arable land is in Europe, followed by North America and Asia. Most of the arable land is used for cereals, including rice, followed by field fodder crops (see graphs).

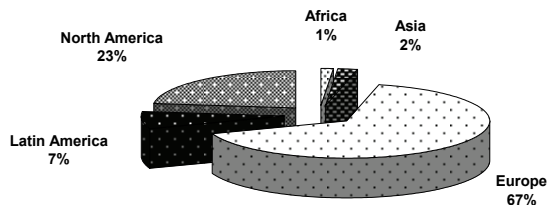


Figure 8: Arable land by continent: The continents’ share of arable land

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

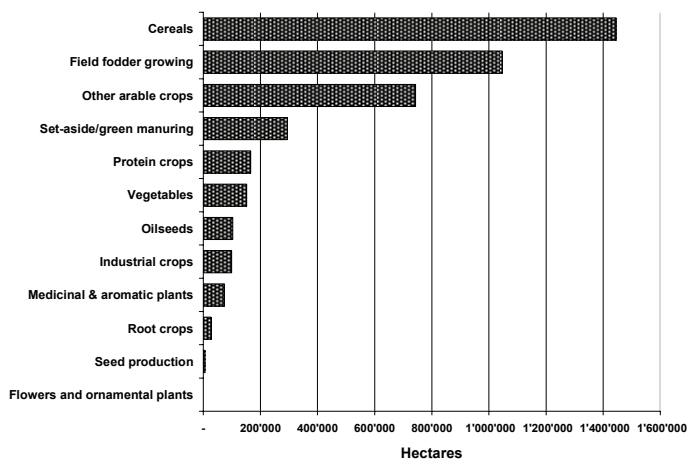


Figure 9: Use of organic arable land (hectares)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Permanent crops

On a global level, permanent crops account for nine percent of the organic agricultural land for which information was available (1.4 million hectares). Most of this land is in Europe, followed by Latin America and Africa. The most important crops are olives (almost a quarter of the permanent cropland) followed by coffee, fruits and nuts.

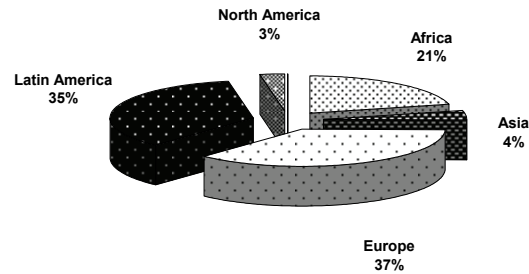


Figure 10: Permanent crops by continent (hectares)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

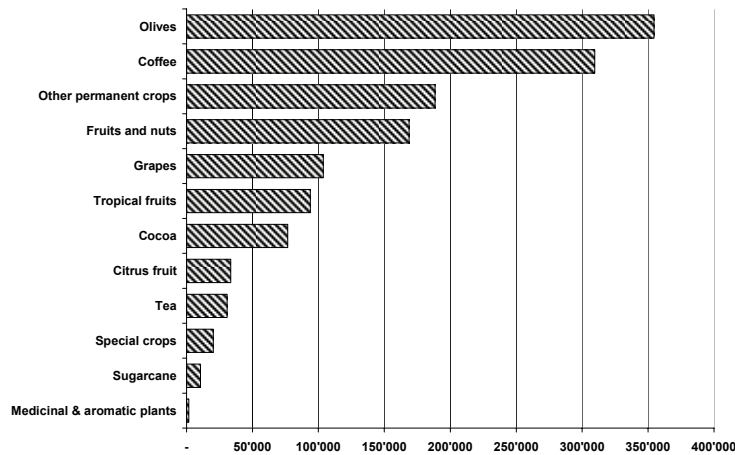


Figure 11: Use of organic permanent cropland (hectares)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Permanent pastures/grassland

On a global level, permanent pastures/grassland (19.8 million hectares) account for almost two third of the world’s organic land. More than half of this grassland is in Australia. Furthermore, large areas of permanent pastures are in Latin America and Europe.

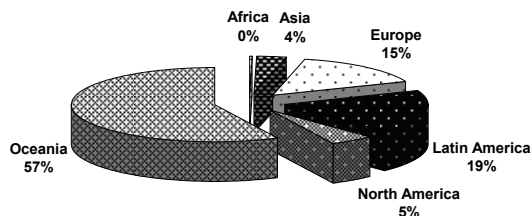


Figure 12: Permanent grassland by continent (hectares)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Land use by continent

Looking at the land use at a continent level for each continent a different pattern emerges.

Table 4: Organic land by main category

Main category	Africa	Asia	Europe	Latin America	North America	Oceania	Total
Arable land	60'999	84'404	2'746'185	306'840	958'325		4'156'754
Other	37'396	990	240'462	10'531			289'379
Other crops	7'796	998'446	130'184	38'890	4'956	370'000	1'550'272
Permanent crops	292'522	59'123	512'538	488'934	40'378	100	1'393'595
Permanent pastures	35'716	710'900	2'995'695	3'776'461	991'024	11'430'000	19'939'796
No information	456'076	1'039'709	295'396	1'187'664	204'541	45'000	3'228'387
Total	890'540	2'893'572	6'920'462	5'809'320	2'199'225	11'845'100	30'558'183

Source: SOEL-FiBL survey 2007

Africa

For Africa (almost 900'000 hectares), information covering about half of the organic agricultural land was available. Most of this land is used for permanent crops. The main permanent crops are cash crops like olives (North Africa), followed by (tropical) fruits, nuts and coffee.

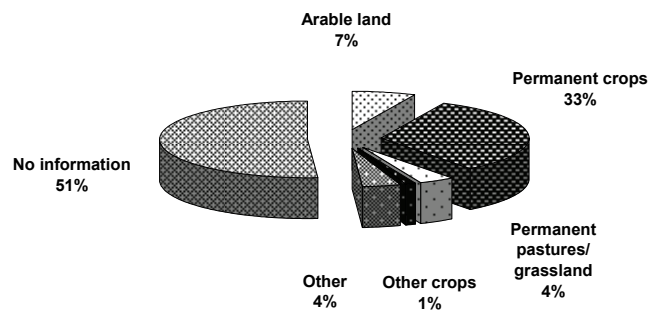


Figure 13: Land use in organic farming in Africa

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Asia

Some details are known for two thirds of the organic land in Asia (almost 2.9 million hectares). Arable land is mainly used for cereals, including rice. The most important permanent crops are coffee, fruits and nuts as well as grapes (see table in the annex). Large areas of extensive grazing land are in China.

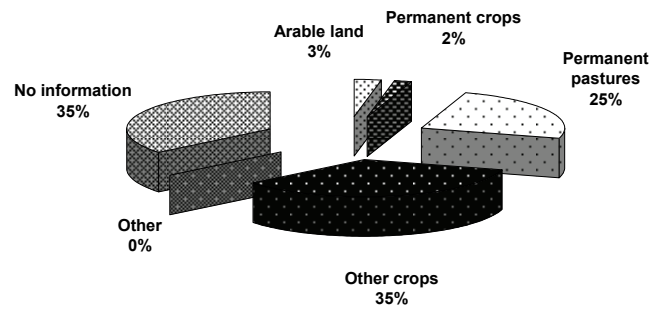


Figure 14: Land use in organic farming in Asia

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Australia/Oceania

Most of the land in Australia is used for extensive grassland. On the remaining land no or little information is available. 100 hectares of coconuts were reported from the Fiji Islands.

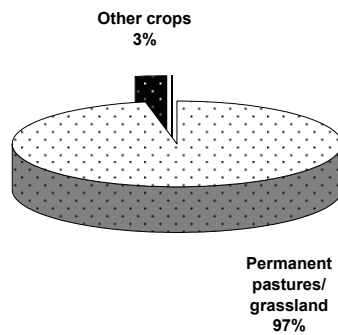


Figure 15: Land use in organic farming in Australia/Oceania

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Europe

In Europe (6.9 million hectares), the organic land uses are known to a good degree, and the main crop categories are well documented. Permanent pastures and arable land have approximately equal shares of the organic agricultural area. The main uses of the arable area include cereals, followed by the cultivation of field fodder. Permanent crops account for seven percent of organic agricultural land. More than half of this land is used for olives, followed by fruits, nuts, and by grapes.

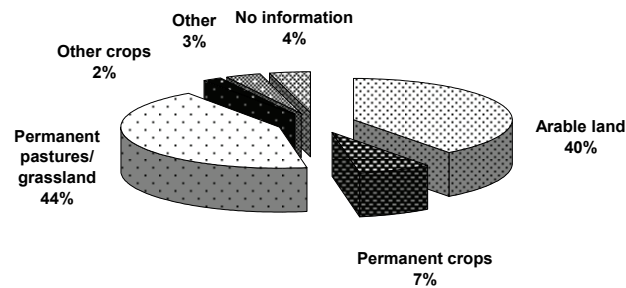


Figure 16: Land use in organic farming in Europe

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Latin America

For Latin America, (5.8 million hectares) most of the organic land, for which information was available, is permanent pasture. Permanent crops account for about eight percent of the agricultural area. The main crops are coffee, fruits, nuts and cocoa.

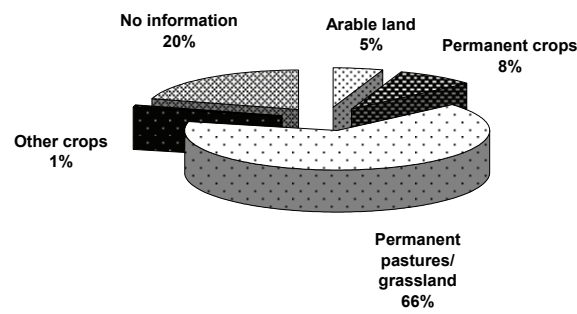


Figure 17: Land use in organic farming in Latin America

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

North America

In North America, crop information was available for most of the the land. Like in Europe, arable land and permanent grassland have almost equal shares. Most of the arable land is used for cereal production.

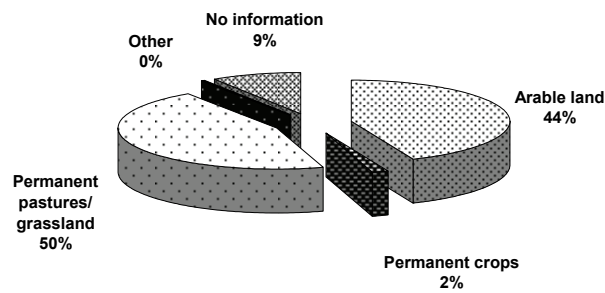


Figure 18: Land use in organic farming in North America

Source: SOEL-FiBL survey 2007

Statistics on important crops (graphs)

In this chapter, graphs showing the importance of major crops by country are presented: Banana, cereals, citrus fruit, cocoa, coffee, cotton, grapes, permanent pastures/grassland, olives, rice, tropical fruit, and wheat.

Please note that in the 2006 edition of 'The World of Organic Agriculture' detailed information is available on the following crops: Cocoa, coffee, cotton and grapes.

It should be noted that for many countries crop data are not available.

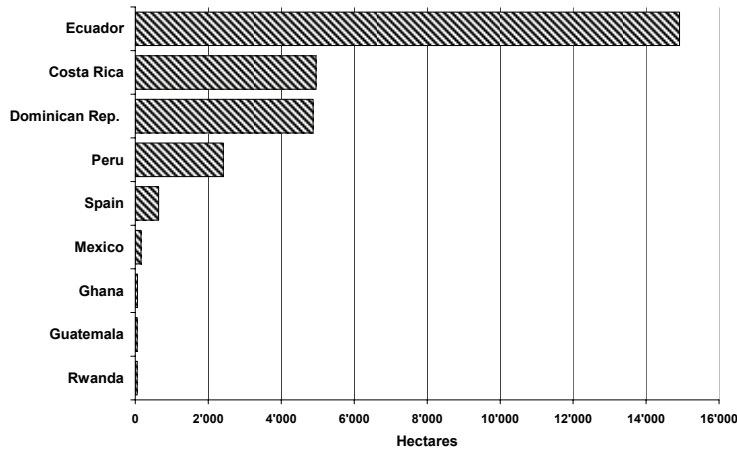


Figure 19: Organic banana production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 50 hectares of bananas).

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

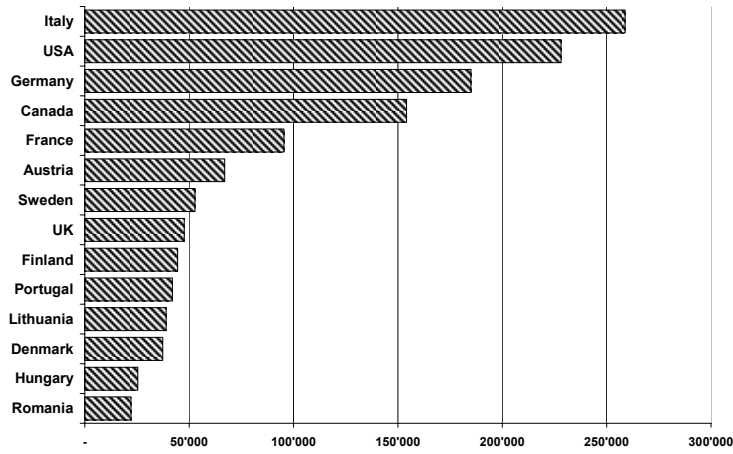


Figure 20: Organic cereal production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 20'000 hectares of cereals).

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

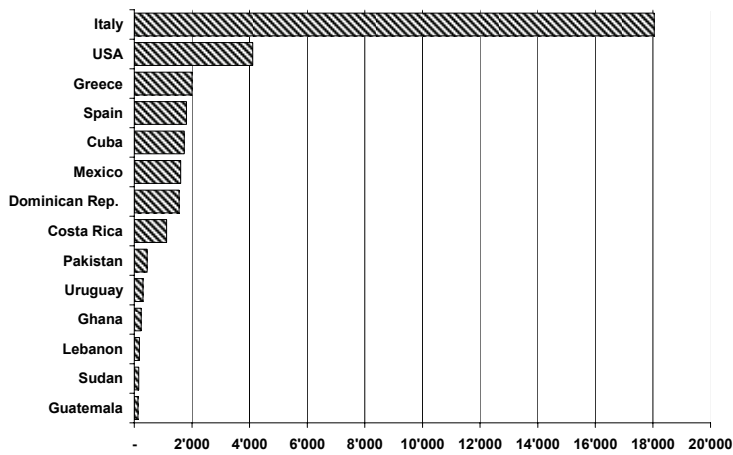


Figure 21: Organic citrus fruit production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 100 hectares of citrus fruit).

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

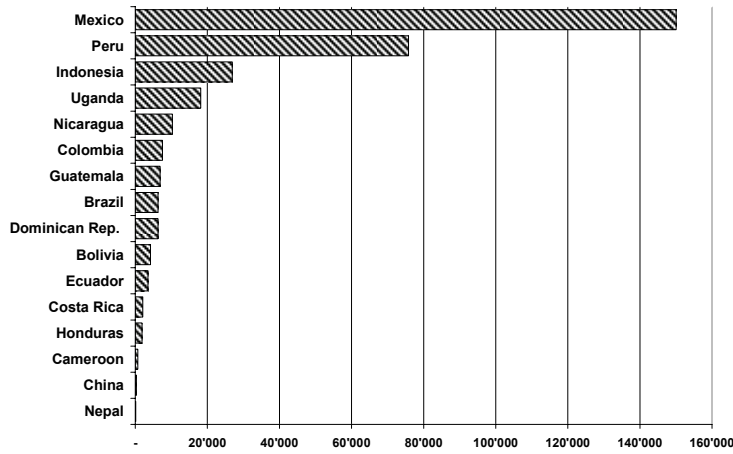


Figure 22: Organic coffee production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 100 hectares of coffee)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

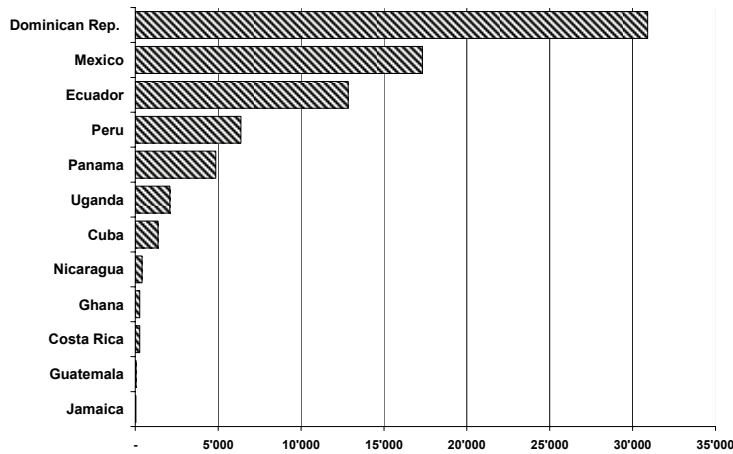


Figure 23: Organic cocoa production (hectares)

The most important countries according to the global organic survey 2007

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

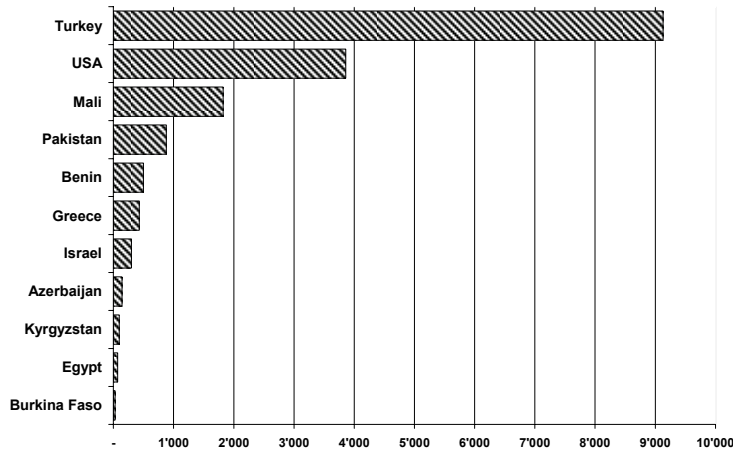


Figure 24: Organic cotton production (hectares)

The most important countries according to the global organic survey 2007

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

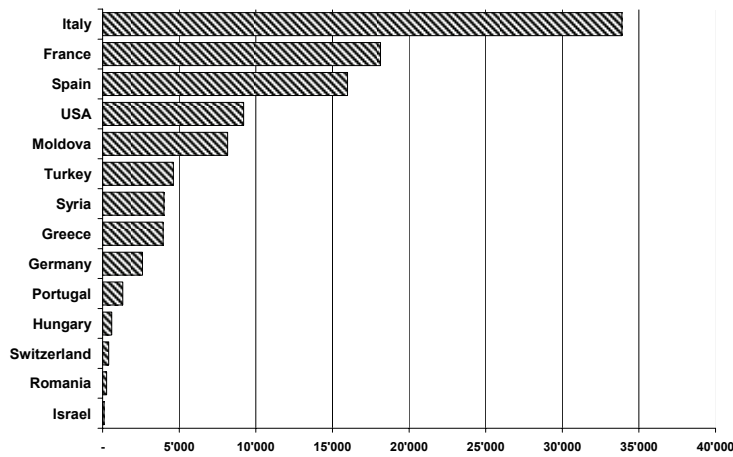


Figure 25: Organic grape production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 100 hectares of grapes).

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

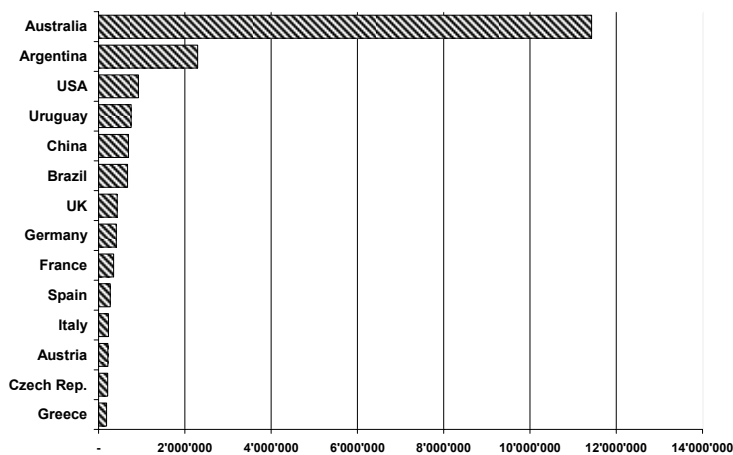


Figure 26: Organic permanent grassland (hectares)

Countries with major areas of organic permanent pastures/grassland according to the global organic survey 2007 (only countries with more than 100'000 hectares of grassland)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

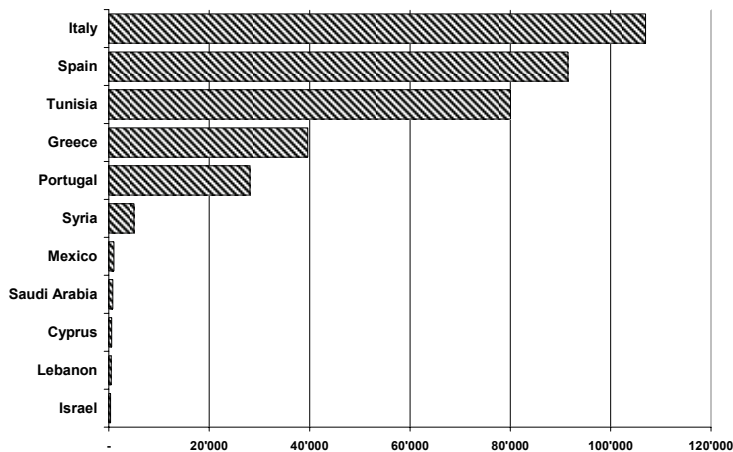


Figure 27: Organic olive production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 100 hectares of olives)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

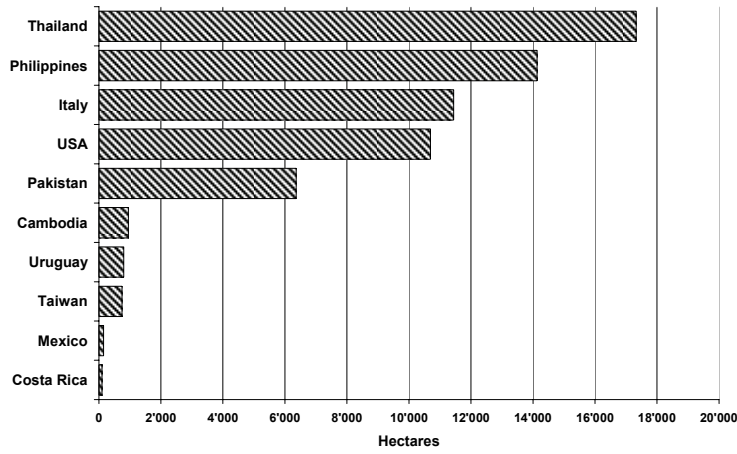


Figure 28: Organic rice production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 100 hectares of rice)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

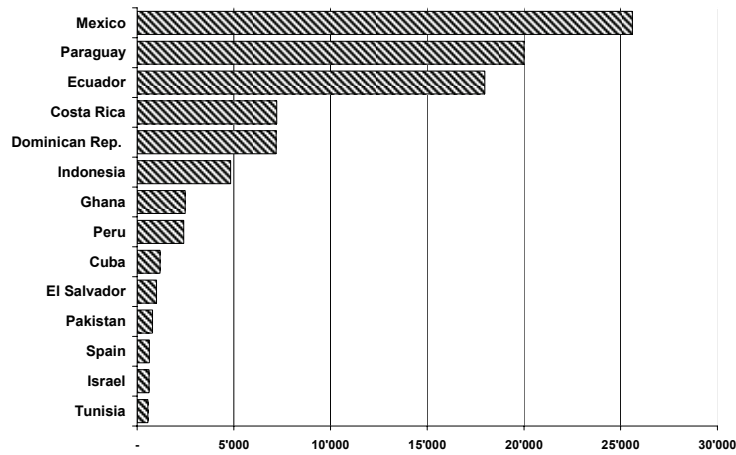


Figure 29: Organic tropical fruit production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 100 hectares of tropical fruits)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

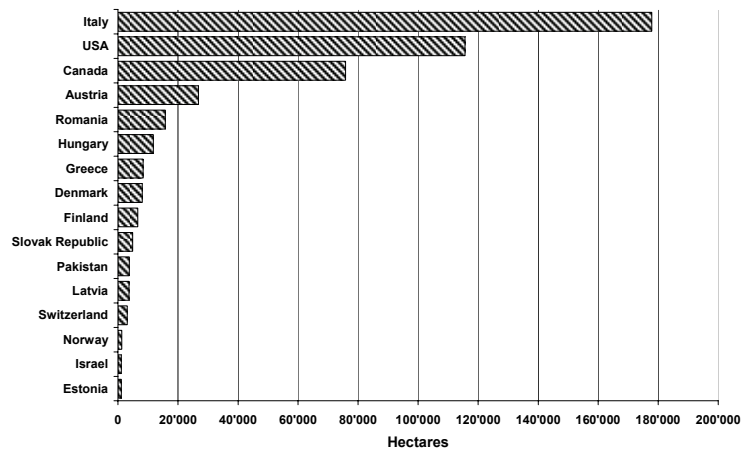


Figure 30: Organic wheat and spelt production (hectares)

The most important countries according to the global organic survey 2007 (only countries with more than 1'000 hectares of wheat and spelt)

Source: SOEL-FiBL survey 2007

Please note: information on land use, crop categories and crops was not available for all countries.

Further reading

Baraibar, Barbara (2006) Organic Coffee. In Willer/Yussefi 2006, Statistics and Emerging Trends. IFOAM, Bonn, Germany. pp 52-54, <http://orgprints.org/5161/>

Baraibar, Barbara (2006) Organic Cotton. In Willer/Yussefi 2006, Statistics and Emerging Trends. IFOAM, Bonn, Germany. pp 55-57, <http://orgprints.org/5161/>

Garibay, Salvador (2006) Organic Cocoa Production. In Willer/Yussefi 2006, Statistics and Emerging Trends. IFOAM, Bonn, Germany. pp 58-61, <http://orgprints.org/5161/>

Geier, Bernward (2006) Organic grapes – More Than Wine and Statistics. In Willer/Yussefi 2006, Statistics and Emerging Trends. IFOAM, Bonn, Germany. pp 62-65, <http://orgprints.org/4858/>