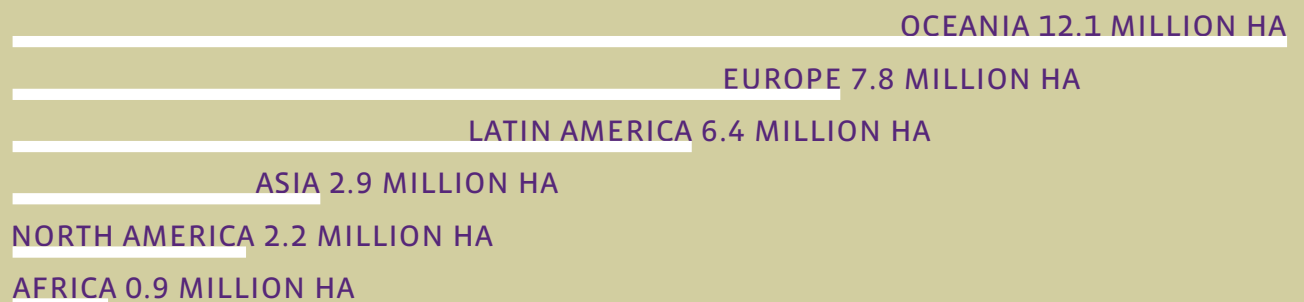




# THE WORLD OF ORGANIC AGRICULTURE

## STATISTICS & EMERGING TRENDS 2009



Supported by



International  
Trade  
Centre



Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

Swiss Confederation



BioFach

Federal Department of Economic Affairs FDEA  
State Secretariat for Economic Affairs SECO

# **THE WORLD OF ORGANIC AGRICULTURE**

**STATISTICS AND EMERGING TRENDS 2009**

**TABLE OF CONTENTS**

Foreword Edition 2009	11
Acknowledgments	12
Sponsors	16
Abbreviations	17
The World of Organic Agriculture 2009: Summary <i>Helga Willer</i>	19
<b>Current Statistics</b>	
Organic Agriculture Worldwide: Current Statistics <i>Helga Willer, Maren Rohwedder, Els Wynen</i>	25
- About the survey	25
- Agricultural area under organic management and number of producers - present situation and growth	26
- Land use and crop data	
- Crop Statistics: Cereals, citrus fruit, coconuts, cocoa, coffee, grapes, olives and wheat	42
- Organic farming in developing countries	51
- Data availability	
- Revisions and updates of the 2006 data (published in the 2008 edition of ‘ The World of Organic Agriculture’)	57
<b>Global Market</b>	
The Global Market for Organic Food & Drink <i>Amarjit Sahota</i>	59
<b>Standards and Regulations</b>	
Standards and Regulations <i>Beate Huber and Otto Schmid</i>	65
More than a Million Farms Certified by 481 Certification Bodies <i>Gunnar Rundgren</i>	75
Overview of Group Certification <i>Joelle Katto-Andrighetto</i>	79
<b>UN Organizations</b>	
The Organics Trade Development Programme (OTDP) of the International Trade Centre (ITC) <i>Alexander Kasterine</i>	83
UNCTAD's Work on Organic Agriculture <i>Sophia Twarog</i>	85

## TABLE OF CONTENTS

The UNEP-UNCTAD CBTF Activities for Promotion of Trade in Organic Agriculture <i>Asad Naqvi</i>	88
<b>Food Security</b>	
Is Organic Farming an Unjustified Luxury in a World With Too Many Hungry People? <i>Niels Halberg, Panneerselvam Peramaiyan and Charles Walaga</i>	95
<b>Crop chapters</b>	
Organic Cotton <i>Paolo Foglia and Simon Ferrigno</i>	102
The Production Base for Organic Temperate Fruit, Berries and Grapes <i>David Granatstein, Elizabeth Kirby and Helga Willer</i>	108
<b>Africa</b>	
Organic Farming in Africa <i>Hervé Bouagnimbeck</i>	114
Background: The IFOAM Africa Office <i>Hervé Bouagnimbeck</i>	122
Africa: Tables: Organic land area, land use, producers	124
Organic Food and Farming in Kenya <i>Paul Rye Kledal, Habwe Florence Oyiera, John Wanjau Njoroge and Eustace Kiariti</i>	127
<b>Asia</b>	
Organic Asia - From Back to Nature Movement & Fringe Export to Domestic Market Trend <i>Ong Kung Wai</i>	134
History of the Regional Movement in Asia <i>Ong Kung Wai</i>	139
Organic Agriculture and Market Potential in India <i>Manoj Kumar Menon</i>	140
Asia: Tables: Organic land area, land use, producers	144
<b>Europe</b>	
Europe: Overview <i>Helga Willer</i>	148
Five Percent More Organic Land in the EU-27 - All Crops on the Increase <i>Diana Schaack</i>	152
Development of the Organic Market in Europe <i>Susanne Padel, Diana Schaack and Helga Willer</i>	155
The Organic Market in Europe: Trends and Challenges <i>Burkhard Schaer</i>	164
Organic Action Plans in Europe <i>Victor Gonzalvez</i>	168

Organic Farming in Europe: Tables: Organic land area, land use, producers	168
<b>Latin America</b>	
Organic Farming in Latin America and the Caribbean <i>Salvador V. Garibay and Roberto Ugas</i>	176
Argentina <i>Dina Foguelman</i>	186
Chile <i>Pilar M. Eguillor Recabarren</i>	189
Colombia <i>Carlos Escobar</i>	193
Organic Agriculture in Cuba: Managing with Limited Resources <i>Lukas Kilcher</i>	198
Dominican Republic <i>Rafael Marty Garcia</i>	204
Ecuador <i>María A. Rovayo and Sonia Lehmann</i>	206
El Salvador <i>Beatriz Alegría</i>	210
Guatemala <i>Eddie Manolo de la Cruz Berganza</i>	213
Mexico <i>Manuel Ángel Gómez Cruz, Rita Schwentesius Rindermann, Laura Gómez Tovar, Javier Ortigoza Rufino and Erin Nelson</i>	216
Venezuela <i>Luisa Díaz Jaimés and Félix Moreno-Elcure</i>	219
Latin America: Tables: Organic land area, land use, producers	221
<b>North America</b>	
United States <i>Barbara Haumann</i>	226
Canada <i>Matthew Holmes and Anne Macey</i>	239
North America: Tables: Organic land area, land use, producers	247
<b>Oceania</b>	
Organic Farming in Australia <i>Els Wymen</i>	250
New Zealand <i>Seager Mason</i>	256

## TABLE OF CONTENTS

Organic Agriculture in the Pacific Region <i>Karen Mapusua</i>	262
Oceania: Table: Land under organic management, producers	269
<b>Achievements Made and Challenges Ahead</b>	
Achievements Made and Challenges Ahead <i>Louise Luttkolt</i>	281
<b>Annex</b>	
Annex: Tables: Organic land, shares of total agricultural land and farms world-wide	275
Information on the data providers and data sources	286

## Tables

Table 1: Organic agricultural land and producers by region 2007	27
Table 2: Organically managed agricultural land by region: growth from 2006 to 2007	31
Table 3: Organically managed agricultural area by main use and region	35
Table 4: Organically managed arable cropland by crop category	37
Table 5: Organically managed permanent cropland by crop category	37
Table 6: Countries with organic aquaculture	39
Table 7: Organic wild collection and bee keeping	41
Table 8: Organic cereals	42
Table 9: Organic citrus fruit	44
Table 10: Organic coconuts	45
Table 11: Organic cocoa beans	46
Table 12: Organic coffee	48
Table 13: Organic grapes	48
Table 14: Organic olives	49
Table 15: Organic wheat	50
Table 16: Countries covered by the global organic survey	54
Table 17: Regulations: Countries with regulations on organic agriculture	65
Table 18: Countries in the process of drafting regulations	68
Table 19: Food security: Different ways how organic agriculture can lead to improved food security for smallholder farmers	97
Table 20: Cotton: Comparison between total and organic production	104
Table 21: Organic cotton fiber production 2007/08 by region (Mt)	105
Table 22: Organic cotton: The ten leading countries 2007/08 (amount in metric tons)	106
Table 23: Estimated world certified organic apple area (2007)	111

TABLE OF CONTENTS

Table 24: Africa: Organic produce from Africa (by type and country)	115
Table 25: Uganda: Export volume 2007	116
Table 26: Africa: Organically managed agricultural land and producers by country 2007	124
Table 27: Africa: Agricultural land use and main crop categories 2007	125
Table 28: Africa: Wild collection areas and bee keeping 2007	126
Table 29: Kenya: Organic farm sector in relation to Kenya's eight provinces	129
Table 30: Kenya: Major organic produce from Kenya's eight provinces 2008	129
Table 31: Kenya: Major organic export categories 2008	131
Table 32: India: Organic Farming in India 2003 and 2007, projections for 2012	142
Table 33: Asia: Organically managed land and producers by country 2007	144
Table 34: Asia: Land use and main crop categories 2007	145
Table 35: Asia: Wild collection areas 2007	146
Table 36: The European market for organic food 2007	162
Table 37: Europe: Organic action plans for organic food and farming in Europe	168
Table 38: Europe: Organically managed agricultural land and producers by country 2007	172
Table 39: Europe: Organic wild collection areas 2007	173
Table 40: Europe: Land use in organic agriculture and main crop categories 2007	174
Table 41: Chile: Land use and crops 2007/2008	190
Table 42: Cuba: Organic production in Cuba end of 2008	200
Table 43: Dominican Republic: Land use, production and number of farms in organic agriculture in 2007	204
Table 44: El Salvador: Export value of major products	211
Table 45: Mexico: Economic importance and growth rate of organic agriculture	216
Table 46: Latin America: Organically managed agricultural land and producers by country 2007	221
Table 47: Latin America: Land use and main crop categories 2007	222
Table 48: Latin America: Wild collection areas and bee keeping 2007	223
Table 49: US: Total mandatory spending on organic agriculture: 2002 and 2008 Farm Bills	227
Table 50: Canada: Organically managed land area and farms according to province 2007	243
Table 51: North America: Organically managed land and producers by country 2007	247
Table 52: North America: Land use and main crop categories 2007	247
Table 53: Australian organic certification bodies and their legal export possibilities	252
Table 54: Pacific Islands: Organic Policies and Standards	265
Table 55: Pacific region: Main certified organic products	267
Table 56: Organic land and producers in Oceania	269
Table 57: Organically managed land area, share of total agricultural and producers by country 2007	275

## TABLE OF CONTENTS

Table 58: Organically managed land area by country 2007	279
Table 59: Share the organically managed of the total agricultural land by country 2007	281
Table 60: Organic producers by country 2007	283

## **Figures**

Figure 1: Distribution of the organically managed agricultural land by region 2007	27
Figure 2: The countries with the largest areas of agricultural land under organic management 2007	28
Figure 3: Conversion status of the organically managed agricultural land by region	29
Figure 4: Countries with highest shares of organic agricultural land 2007	30
Figure 5: Development of organic agricultural land and wild collection areas/bee keeping 1999-2007	32
Figure 6: Organic producers by region 2007	33
Figure 7: The countries with the highest numbers of organic producers	33
Figure 8: Land use in organic agriculture by region 2007	38
Figure 9: Organic wild collection and bee keeping by region 2007	40
Figure 10: The ten countries with the largest organic wild collection and bee keeping areas 2007	40
Figure 11: Developing countries: The countries with the largest areas under organic agricultural management 2007	51
Figure 12: Developing countries: The countries with the highest shares of organic land 2007	52
Figure 13: Developing countries: Land use in organic farming 2007	53
Figure 14: Data collection systems in the countries covered by the FiBL/IFOAM survey by region	55
Figure 15: The global market for organic food and drink: Market growth 1999-2007	59
Figure 16: The global market for organic food and drink: Distribution of global revenues by region 2007	63
Figure 17: Certification bodies: The countries with the most certification bodies	75
Figure 18: Certification bodies: Distribution by continent	76
Figure 19: Certification bodies: Start of operation of organic certification	77
Figure 20: Changes in net trade in important food crops for sub-Saharan Africa	98
Figure 21: Organic Cotton: Growth of production 2004-2008; forecast for 2008-09	104
Figure 22: Organic textile products: Estimated global retail sales	106
Figure 23: Organic temperate fruit, grape and berry area 2007	109
Figure 24: Organic temperate fruit, berry and grape area 2007 by conversion status	109
Figure 25: Organic temperate fruit, grape and berry area: Shares of the leading countries 2007	110
Figure 26: Uganda: Development of organic agriculture: organically managed land and producers	117



Figure 27: India: Development of the land under organic management and of organic farms	141
Figure 28: Europe: Development of the organically managed agricultural land area 1985-2007	148
Figure 29: Europe: Land use in organic agriculture in the countries of Europe	154
Figure 30: European market for organic food: The ten countries with the highest sales	156
Figure 31: European market for organic food: The ten countries with the highest shares of organic food sales	156
Figure 32: European Market: Marketing channels for organic food in 27 European countries	165
Figure 33: Latin America: Development of the land under organic management in Latin America 1995-2007	176
Figure 34: Latin America: The ten countries with the largest organic agricultural area 2007	177
Figure 35: Latin America: Organic banana area	180
Figure 36: Latin America: Organic coffee area	181
Figure 37: Latin America: Organic cocoa area	182
Figure 38: Latin America: Organic sugar cane area	183
Figure 39: Argentina: Development of the organic grassland and the harvested area 1995-2007	188
Figure 40: Colombia: Development of the organic agricultural land and wild collection areas 2002-2008	194
Figure 41: Colombia: Use of fully converted organic and certified in-conversion cropland	195
Figure 42: Ecuador: Development of the area under organic production 2001-2007	206
Figure 43: Ecuador: Area under organic production by main products	207
Figure 44: Ecuador: Changes in the value chain of organic coffee for small producers within 2 years 2004-2006	208
Figure 45: Mexico: Main crop categories. Converted agricultural land	217
Figure 46: United States: Development of the organic market 1997-2006	228
Figure 47: United States: Number of certified entities by the US by region	235
Figure 48: United States: Development of the organic land area 1992-2005	236
Figure 49: United States: Development of the number of organic farms 1992-2005	236
Figure 50: Canada: Percentage of purchases that are organic 2008	240
Figure 51: Canada: primary reasons for buying organic 2008	241
Figure 52: Canada: Development of organically managed land area and number farms	242
Figure 53: Australia: Development of the land under organic management 2001-2007	250
Figure 54: New Zealand: Exports by market 2007	258
Figure 55: New Zealand: Exports by product category 2007	258
Figure 56: Pacific Region: Organic agricultural land area 2006	263

TABLE OF CONTENTS

**Maps**

Map 1: Land under organic management by region 2007	20
Map 2: Land under organic management in the countries of Africa 2007	113
Map 3: Asia: Land under organic management in the countries of Asia 2007	133
Map 4: Europe: Land under organic management in the countries of Europe 2007	147
Map 5: Latin America: Land under organic management in the countries of Latin America 2007	175
Map 6: North America: Land under organic management	225
Map 7: US: Number of certified entities according to the US Organic Standard NOP by country in 2008	234
Map 8: Oceania: Land under organic management	249

## **Foreword Edition 2009**

The Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM) are proud to present the 2009 edition of 'The World of Organic Agriculture.' For the tenth time the data and information compiled in this volume document the current statistics, recent developments and trends in global organic farming. The comprehensive data are an important tool for stakeholders, policy makers, authorities, the industry and consultants. They can be useful in supporting strategies for organic agriculture and markets as well as for monitoring the impact of support activities for organic agriculture.

For this edition, the statistical information and all chapters have been updated. New additions include chapters on selected organic crops, on the organic farming related activities of UN Organizations, on food security, on group certification as well as detailed information on organic agriculture in the countries of Latin America and the Caribbean.

We would like to express our thank to all authors and data providers for contributing in depth information and data on their region, their country or their field of expertise.

We are very grateful to our sponsors, the International Trade Centre (ITC) and the Swiss State Secretariat for Economic Affairs (SECO) / Economic Development and Cooperation, for their support for this project which will help to expand and improve the data collection and processing activities in the future.

Furthermore we are happy to count on the continuous support of Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair.

Bonn and Frick, February 2009

Diane Bowen  
Interim Executive Director  
International Federation of Organic  
Agriculture Movements IFOAM  
Bonn, Germany

Urs Niggli  
Director  
Research Institute of Organic Agriculture  
FiBL  
Frick, Switzerland

## Acknowledgments

Numerous individuals have contributed to the making of this book, as data and information providers, as authors or as supporters.

We are very grateful to all those listed below, without who it would not have been possible to produce this global statistical yearbook:

**Haya Abou Assaf**, General Commission for Scientific Agricultural Research, Damascus, Syria; **Gyorgyi Acs Feketene**, Control Union Certifications, Zwolle, Netherlands; **O.O. AdeOluwa**, University of Ibadan, Department of Agronomy, Ibadan, Nigeria; **Samuel Adimado**, Ghana Organic Agriculture Network GOAN, Ghana; **Raymond Aendekerck**, Biolabel - Vereniging fir Biologesche Landbau Letzebuerg, Oikopolis, Munsbach, Luxemburg; **Issac Aiyelaagbe**, Organic Agriculture Project in Tertiary Institutions in Nigeria; **Lina AL Bitar**, Istituto Agronomico Mediterraneo IAMB, Valenzano, Italy; **Beatriz Alegria**, Consorcio CLUSA-CORDES, Colonia Escalon, San Salvador, El Salvador; **Miguel Altamirano**, Instituto Interamericano de Cooperación para la Agricultura (IICA), Proyecto de Fomento a la Producción y Comercialización Orgánica de Nicaragua, Cooperación Austriaca para el Desarrollo (ADA), Managua, Nicaragua; **Fernando Rios Alvarenga**, Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas SENAVE, Asunción, Paraguay; **Stoilko Apostolov**, Bioselena: Foundation for Organic Agriculture, Karlovo, Bulgaria; **Amin Babayev**, Ganja Agribusiness Association, Ganja, Azerbaijan; **Vugar Bashirov**, AZEKOSERT, Ganja, Azerbaijan; **Milena Belli**, Istituto per la Certificazione Etica ed Ambientale ICEA, ICEA Foreign Office, Bologna, Italy; **Hervé Bouagnimbeck**, International Federation of Organic Agriculture Movements, Bonn, Germany; **Diane Bowen**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Klaus Büchel**, Klaus Büchel Anstalt, Ingenieurbüro für Agrar- und Umweltberatung, Mauren, Liechtenstein; **Ged Buffee**, Research Institute of Organic Agriculture FiBL, Development and Cooperation, Frick, Switzerland; **Michelle Carter**, Care International, Maputo, Mozambique; **Munshimbwe Chitalu**, Organic Producers & Processors Association of Zambia (OPPAZ), Lusaka, Zambia; **Thomas Cierpka**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Antonio Compagnoni**, Istituto per la Certificazione Etica ed Ambientale (ICEA), Relazioni Internazionali, Bologna, Italy; **Nune Darbinyan**, ECOGLOBE - Organic control and certification body, Yerevan, Republic of Armenia; **Manolo De la Cruz Berganza**, Ministerio de Agricultura, Ganadería y Alimentación MAGA-UNR, Agricultura Orgánica, Ciudad de Guatemala; **Luisa Díaz Jaimés**, Instituto Nacional de Investigaciones Agrícolas INIA, Estado Táchira, Venezuela; **Karolína Dytrtová**, Bioinstitut, o.p.s., Institute for Ecological Agriculture and Sustainable Landscape Development, Olomouc, Czech Republic; **Pilar M. Eguillor Recabarren**, Ministerio de Agricultura, Oficina de Estudios y Políticas Agrarias, Santiago, Chile; **Markus Ehmman**, HELVETAS Swiss Association for International Cooperation, BioCotton Project Bishkek, Kyrgyzstan; **Youssef El Khoury**, IMC Lebanon, Beirut, Lebanon; **Carlos Escobar**, Conexion Ecologica, Cali, Colombia; **Frank Eyhorn**, Helvetas Swiss Association for International Cooperation, Programme Coordination Mali/Burkina Faso, Zurich, Switzerland; **Monique Faber**, Administration des services techniques de l'agriculture (ASTA), Service de la protection des végétaux, Luxembourg; **Sunita Facknath**, University of Mauritius, Faculty of Agriculture -Reduit, Mauritius; **Simon Ferrigno**, Organic Exchange, Farm Development

Program, O'Donnell, USA; **Ana Firmino**, Universidade Nova de Lisboa/FCSH, Faculdade de Ciências Sociais e Humanas, Lisboa, Portugal; **Tobias Fischer**, BCS Öko-Garantie GmbH, Nürnberg, Germany; **Paolo Foglia**, Istituto per la Certificazione Etica ed Ambientale ICEA, Ricerca e Sviluppo, Bologna, Italy; **Udo Funke**, BioFach - World Organic Trade Fair, Nürnberg Messe, Nürnberg, Germany; **Jaime E. García G**, Universidad Estatal a Distancia (UNED), Centro de Educación Ambiental (CEA), de Agricultura y Ambiente (AAA), San Pedro de Montes de Oca, Costa Rica; **Maheswar Ghimire**, Kathmandu, Nepal; **Manuel Gómez Cruz**, Universidad Autónoma Chapingo/Chapingo University, Centro de Investigaciones Interdisciplinarias para el Desarrollo Rural Integral (CIIDRI), Chapingo, Estado de México; **Laura Gómez Tovar**, Universidad Autónoma Chapingo, Centro de Investigaciones Interdisciplinarias para el Desarrollo Rural Integral (CIIDRI), Chapingo, Mexico; **Victor González Pérez**, Spanish Society for Organic Agriculture SEAE, Catarroja, Spain; **P.V.S.M. Gouri**, Agricultural and Processed Food Products. Export Development Authority APEDA, Ministry of Commerce and Industry, Govt. of India, New Delhi, India; **David Granatstein**, Washington State University, Tree Fruit Research & Extension Center USA-Wenatchee; **Catherine Greene**, Economic Research Service, Washington, DC, USA; **Iulia Grosulescu**, Ministry Of Agriculture and Rural Development, Organic Farming Office, Bucharest, Romania; **Anula Guda**, SASA PIU, Swiss Development Cooperation, Tirana, Albania; **Katell Guernic**, Agence Bio, Montreuil-sous-Bois, France; **Gunnar Á. Gunnarsson**, Vottunarfötan Tún ehf., Organic Inspection and Certification, Reykjavik, Iceland; **Khalil Haddad**, LibanCert SAL, Beirut, Lebanon; **Maida Hadžomerovic**, Organska Kontrola, Sarajevo. Bosnia & Herzegovina; **Niels Halberg**, International Centre for Research in Organic Food Systems ICROFS, Tjele, Denmark; **Ulrich Hamm**, Kassel University, Witzenhausen, Germany; **Barbara Haumann**, Organic Trade Association (OTA), Greenfield, USA; **Sampsa Heinonen**, Finfood Luomu, Vantaa, Finland; **Ines Hensler**, Institute of Market Ecology IMO, Weinfelden, Switzerland; **Matthew Holmes**, Organic Trade Association, Canadian Office, Sackville, Canada; **Beate Huber**, Research Institute of Organic Agriculture FiBL, Development and Cooperation, Frick, Switzerland; **Britta Jankay**, Control Union Certifications, Zwolle, Netherlands; **Kirsten Lund Jensen**, Dansk Landbrug, Copenhagen, Denmark; **Mariam Jorjadze**, Elkana - Biological Farming Association, Akhaltsikhe, Georgia; **Sonja Karoglan Todorovic**, Ecologica, Zagreb, Croatia; **Alexander Kasterine**, International Trade Centre (ITC), UNCTAD/WTO, Geneva, Switzerland; **Lani Katimbang-Limpin**, Organic Certification Center of the Philippines (OCCP), Barangay Laging Handa, Quezon City, Philippines; **Joelle Katto-Andrighetto**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Lahcen Kenny**, Institut Agronomique et Vétérinaire Hassan II, Horticulture & Agriculture Biologique Agadir, Morocco; **Andrey Khodus**, Agrosophie, RU-Solnechnogorsk; **Eustace Kiarri**, Kenya Organic Agricultural Network (KOAN), Nairobi, Kenya; **Lukas Kilcher**, Research Institute of Organic Agriculture FiBL, Development and Cooperation, Frick, Switzerland; **Elizabeth Kirby**, Washington State University, Tree Fruit Research & Extension Center, Wenatchee, USA; **Claudia Kirchgraber**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Paul Rye Kledal**, University of Copenhagen, Faculty of Life Sciences, Institute of Food and Resource Economics, Frederiksberg, Denmark; **Elisabeth Klingbacher**, FiBL Austria, Kommunikation, Wien, Austria; **Hellmut von Koerber**, fleXinfo, fleXible Informations-Systeme, Frick, Switzerland; **Matthias Koesling**, Norwegian Institute for Agricultural and Environmental Research, Bioforsk Organic Food and Farming Division, Tingvoll, Norway; **Dóra Kovács**, Hungária Öko Garan-

## ACKNOWLEDGEMENTS

cia Kft., Budapest, Hungary; **Manoj Kumar Menon**, ICCOA International Competence Centre for Organic Agriculture, Rajarajeshwarinagar, Bangalore, India; **Noel Kwai**, Tanzania Organic Agriculture Movement (TOAM), Dar es Salaam, Tanzania; **Yolandina Lambur Valle**, Secretaria de Agricultura y Ganadería (SAG), Servicio Nacional de Sanidad Agropecuaria de Honduras SENASA, Tegucigalpa, República de Honduras; **Sonja Lehmann**, GTZ Ecuador, Quito, Ecuador; **Ralph Liebing**, FiBL Austria, Wien, Austria; **Ming Chao Liu**, Organics Brazil, Brazil; **Perrine Liu**, YU-SHI, Taiwan; **Amilcar Lucas**, Care International Mozambique, Maputo, Mozambique; **Ruedi Lüthi**, Helvetas, PROFILE/PRORICE, Vientiane Capital, Laos; **Louise Luttkholt**, International Federation of Organic Agriculture Movements (IFOAM), Bonn, Germany; **Samia Maamer Belkhiria**, Ministry of Agriculture and Hydraulic Resources, National Bureau of Organic Agriculture, Tunis, Tunisia; **Anne Macey**, Canadian Organic Grower, Saltspring Island, Canada; **Hossein Mahmoudi**, Environmental Sciences Research Institute, Evin, Shahid Beheshti University, Evin, Tehran, Iran; **Souhel Makhoul**, General Commission for Scientific Agricultural Research, Damascus, Syria; **Betty Mandl**, MGAP DSGA, Uruguay; **Karen Mapusua**, Women in Business Development Inc, Apia, Samoa; **Javier Martinez**, Comisión de Promoción del Perú para la Exportación y el Turismo - PromPerú, San Isidro, Peru; **Rafael Marty Garcia**, Santo Domingo Este, Provincia Santo Domingo, Rep. Dominicana; **Seager Mason**, BIO-GRO New Zealand, Wellington, New Zealand; **Eddie Mc Auliffe**, The Organic Farming Unit, Department of Agriculture, Food and Rural Development, Johnstown, Co. Wexford, Ireland; **Beata Meinander**, Finnish Food Safety Authority Evira, Loimaa, Finland; **Minou Menzler**, Foundation Ecology & Agriculture (SÖL), Bad Dürkheim, Germany; **Dorota Metera**, BIOEKSPERT Jednostka Certyfikująca w Rolnictwie Ekologicznym, Warszawa, Poland; **Eugene Milovanov**, Organic Federation of Ukraine, Kiev, Ukraine; **Satoko Miyoshi**, IFOAM Japan, Saitama, Japan; **Laura Montenegro**, Argencert, Buenos Aires, Argentina; **Felix A. Moreno E.**, Universidad Nacional Experimental del Tachira, Decanato de Investigación, Estado Tachira, Venezuela; **Peter Murava**, Rwanda Horticulture Development Authority (RHODA), Kigali, Rwanda; **Charity Namuwoza**, National Organic Agricultural Movement of Uganda NOGAMU, Kampala, Uganda; **Asad Naqvi**, United Nations Environment Programme UNEP, Economics and Trade Branch Chatelaine, Geneva, Switzerland; **Urs Niggli**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **John Njroroge**, Kenya Institute of Organic Farming, KIOF, Nairobi, Kenya; **Ong Kung Wai**, Grolink, c/o Humus Consultancy, Penang, Malaysia; **Pnina Oren Shnidor**, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services, PPIS, Israel; **Kolbjörn Örjavik**, Grolink, Höje, Sweden; **Rosaleen O'Shaughnessy**, Bord Bia, Corporate Communications, Dublin, Ireland; **Habwe Florence Oyiera**, Maseano University, School of Public Health and Community Development, Kenya; **Susanne Padel**, Aberystwyth University, Institute of Rural Sciences, Aberystwyth, UK; **Egon Palts**, Estonian Plant Inspectorate, Saku (Harju), Estonia; **Vitoon Panyakul**, Green Net, Bangkok, Thailand; **Panneerselvam Peramaiyan**, University of Aarhus, Department of Agroecology, Tjele, Denmark; **Roberto Pinton**, Pinton Organic Consulting, Padova, Italy; **Agung Prawoto**, BIOCert, Bogor, Indonesia; **Andrianjaka Rajaonarison**, Laulanié Green Association/University, Antananarivo, Madagascar; **Juan Carlos Ramirez**, SENASA, Dirección de Calidad Agroalimentaria, Buenos Aires, Argentina; **Sandra Randrianarisoa**, Ecocert East Africa, Antananarivo, Madagascar; **Michel Reynaud**, Ecocontrol GmbH, Northeim, Germany; **Markus Rippin**, Agromilagro Research, Bornheim, Germany; **Dwight Robinson**, Jamaica Organic Agriculture Movement (JOAM), Kingston, Jamaica; **Maren Rohwedder**,

Ljusdal, Sweden; **Mariuxi Rovayo**, GTZ Ecuador, GTZ-Programa GESOREN, Quito, Ecuador; Javier **Ortigoza Rufino**, Universidad Autónoma Chapingo, Centro de Investigaciones Interdisciplinarias para el Desarrollo Rural Integral (CIIDRI), Chapingo, Mexico; **Gunnar Rundgren**, Grolink AB, Hölje, Sweden; **Amarjit Sahota**, Organic Monitor Ltd., London, UK; **Julia Salazar**, SENASA Perú, Responsable de la Autoridad Nacional Competente en Producción Orgánica del Perú, Lima, Perú; **Diana Schaack**, Central Market and Price Report Office ZMP, Bonn, Germany; **Burkhard Schaer**, ECOZEPT, Montpellier, France; **Winfried Scheewe**, CEDAC, Phnom Penh, Cambodia; **Otto Schmid**, Research Institute of Organic Agriculture FiBL, Socio-economics, Frick, Switzerland; **Rita Schwentenius**, Chapingo University, Centro de Investigaciones Interdisciplinarias para el Desarrollo Rural Integral (CIIDRI), Chapingo, Estado de México; **Anamarija Slabe**, Institut za trajnostni razvoj, Institute for Sustainable Development SI-Ljubljana; Nicolette an der **Smissen**, DIO, Alexandroupoli, Greece; **Manjo Smith**, Greenspot Organics & Cool Burst Beverages, Okahandja, Namibia; **Sang Mok Sohn**, Dan Kook University, Research Institute of Organic Agriculture, Cheonan, Rep. of Korea; **Neil Sorensen**, NGO publishing; Pantin, France; **Erdal Süngü**, Ministry of Agriculture and Rural Affairs, Horticulture Engineer, Ankara, Turkey; **Petra Tas**, Bioforum Vlaanderen vzw, Communication, Antwerpen, Belgium; **Alistair Taylor**, Agro Eco, Uganda Branch, Joint implementer of the EPOPA programme, Kampala, Uganda; **Gia Gasparid Taylor**, Network of Non Governmental Organizations Trinidad and Tobago for the Advancement of Women, Director Information, Communications and Technology; **Radomir Trajkovic**, PROBIO, Skopje, Macedonia; **Kesang Tshomo**, National Organic Programme, Thimphu Bhutan; **Sophia Twarog**, UNCTAD, Trade, Environment & Development Branch, Geneva, Switzerland; **Tom Vaclavik**, Green Marketing, Moravské Knínice, Czech Republic; **Charles Walaga**, Ugocert, Uganda; **Maohua Wang**, Certification and Accreditation Administration of the People's Republic of China CNCA, Department for Registration, Haidian district, Beijing, China; **Helga Willer**, Research Institute of Organic Agriculture, Frick, Switzerland; **Els Wynen**, Eco Landuse Systems, Flynn, Australia; **Abdoul Aziz Yanogo**, ECO-CERT SA West Africa Office, ECO-CERT Ouagadougou, Benin; **José Zapata**, Secretaria de Estado de Agricultura, Oficina de Control Agricultura Organica, Santo Domingo, Republica Dominicana; **Darko Znaor**, Independent Consultant, Zagreb Croatia.

## **Sponsors**

We are very grateful to our sponsors for granting financial support for the global data collection and for the 2009 edition of 'The World of Organic Agriculture':

- International Trade Centre (ITC)  
Geneva  
Switzerland  
[www.intracen.org/dbms/organics](http://www.intracen.org/dbms/organics)
- Swiss State Secretariat for Economic Affairs (SECO)  
Economic Development and Cooperation (within the framework of its support activities for organic production in developing countries)  
Berne, Switzerland  
[www.seco.admin.ch](http://www.seco.admin.ch)
- NürnbergMesse, the organizers of the BioFach World Organic Trade Fair  
Nürnberg  
Germany  
[www.biofach.de](http://www.biofach.de), [www.nuernbergmesse.de](http://www.nuernbergmesse.de)



## **Abbreviations**

APEDA: Agricultural & Processed Food Products Export Development Authority, India

AQIS: Australian Quarantine and Inspection Service

CACC: Certification, Accreditation and Compliance Committee of the US National Organic Standards Board (NOSB)

CBTF: Capacity Building Task Force on Trade, Environment and Development of the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Environment Programme (UNEP)

EOAM: East African Organic Mark

EAOPS: East African Organic Product Standard

EPOPA: Export Promotion of Organic Products from Africa

EU: European Union

FAO: Food and Agriculture Organization of the United Nations

FiBL: Research Institute of Organic Agriculture, Switzerland

GTZ: German Society for Technical Cooperation and Development, Germany

IAASTD: International Assessment of Agricultural Knowledge, Science and Technology for Development

IAMB: Mediterranean Agronomic Institute of Bari, Italy

IFAD: International Fund for Agricultural Development

IFOAM: International Federation of Organic Agriculture Movements

IOAS: International Organic Accreditation Service

ICROFS: International Center for Research in Organic Food Systems, Denmark

IFPRI: International Food Policy Research Institute

ITC: International Trade Centre, Geneva

JAS: Japan Agricultural Standard

KEBS: Kenya Bureau of Standards

MOAN: Mediterranean Organic Agriculture Network, Italy

NOGAMU: National Organic Agricultural Movement of Uganda

NOSB: US National Organic Standards Board

NGO: Non-governmental organization

#### ABBREVIATIONS

NOP: National Organic Program of the United States

OTA: Organic Trade Association, USA

SECO: Swiss State Secretariat for Economic Affairs

SIDA: Swedish International Development Cooperation Agency

SME: Small and Medium Enterprises

UNCTAD: United Nations Conference on Trade and Development

UNEP: United Nations Environment Programme

UNESCO: United Nations Educational, Scientific and Cultural Organization

USDA: United States Department of Agriculture

WTO: World Trade Organization

ZMP: Central Market and Price Report Office, Germany

# **The World of Organic Agriculture 2009: Summary**

**HELGA WILLER<sup>1</sup>**

## *Recent statistics*

Organic agriculture is developing rapidly, and statistical information is now available from 141 countries of the world. Its share of agricultural land and farms continues to grow in many countries. The main results of the global survey on certified organic farming show:

- 32.2 million hectares of agricultural land are managed organically by more than 1.2 million producers, including smallholders (2007). In addition to the agricultural land, there are 0.4 million hectares of certified organic aquaculture.
- The regions with the largest areas of organically managed agricultural land<sup>2</sup> are Oceania, Europe and Latin America. Australia, Argentina and Brazil are the countries with the largest organically managed land areas.
- The highest shares of organically managed land are in Europe: Liechtenstein, Austria and Switzerland.
- The countries with the highest numbers of producers are Uganda, India and Ethiopia. Almost half of the world's organic producers are in Africa.
- About one third of the world's organically managed land – almost 11 million hectares – is located in developing countries. Most of this land is in Latin American countries, with Asia and Africa in second and third place. Countries with the largest area under organic management are Argentina, Brazil, China, India and Uruguay.
- Almost 31 million hectares are organic wild collection areas and for bee keeping. The majority of this land is in developing countries – quite the opposite of agricultural land, of which two thirds is in developed countries.
- Almost two thirds of the land under organic management is grassland (20 million hectares). The cropped area (arable land and permanent crops) constitutes 7.8 million hectares - a quarter of the organically managed land. Compared with the previous survey, there is a clear trend for cropland to increase. Relatively high shares for some crops have been achieved; organically managed coffee and olive areas reported, for instance, account for more than five percent of the total harvested areas, and in some countries the shares are even higher – 30 percent of Mexico's coffee is organic.
- On a global level, the organic land area increased by almost 1.5 million hectares compared to the data from 2006. Twenty-eight percent (or 1.4 million hectares) more land under organic management was reported for Latin America (including 0.9 million hectares of in-conversion land in Brazil for which no data had been available previously). In Europe, organically managed land increased by 0.33 million hectares (+ 4 percent) and by 0.18 million hectares (+27 percent) in Africa.

---

<sup>1</sup> Dr. Helga Willer, Communication, Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Internet [www.fibl.org](http://www.fibl.org)

<sup>2</sup> The term 'organically managed land' etc. refers to certified organic agriculture and includes both the certified in-conversion areas and the certified fully converted areas.



**Map 1: Land under organic management by region 2007**

Source: FiBL/IFOAM

### **Market**

Global demand for organic products remains robust, with sales increasing by over five billion US Dollars<sup>1</sup> a year. Organic Monitor estimates international sales to have reached 46.1 billion US Dollars in 2007. Consumer demand for organic products is concentrated in North America and Europe; according to Organic Monitor these two regions comprise 97 percent of global revenues. Asia, Latin America and Australasia are important producers and exporters of organic foods. Exceptionally high growth rates have led supply to tighten in almost every sector of the organic food industry: fruits, vegetables, beverages, cereals, grains, seeds, herbs and spices. With the financial crisis, Organic Monitor expects positive market growth rates to continue, albeit at lower rates than previous years (see chapter on the global market by Amarjit Sahota).

### **Standards and regulations**

On January 1, 2009, the completely revised Regulation on Organic Production - EU Regulation (EC) 834/2007 - and its implementation rules came into force. Farmers in Europe, as well as those from importing countries, will have to deal with the new regulation and its changed rules. Currently, 71 countries have implemented regulations on organic farming,

<sup>1</sup> 1 US Dollar = 0.73082 Euros. Average exchange rate 2007

and 21 countries are in the process of drafting a regulation (see chapter on standards and regulations by Beate Huber and Otto Schmid). 481 organizations worldwide offer organic certification services. Most certification bodies are in the European Union, the United States, Japan, South Korea, China, Canada, and Brazil (see chapter on certification bodies by Gunnar Rundgren).

The UNCTAD-FAO-IFOAM International Task Force on Harmonization and Equivalence in Organic Agriculture (ITF) has worked from 2003 to 2008 to reduce technical barriers to trade in organic agricultural products that result from the lack of harmonization and interoperability of organic regulations, private standards and certification requirements. At a launch in Geneva in October 2008, two tools that were developed by the ITF were presented to the public: the Tool for Equivalence (EquiTool), an international guideline for determining equivalence of organic standards and the International Requirements for Organic Certification Bodies (IROCB). A 'Beyond ITF' project is envisaged to promote uptake of the ITF recommendations and tools and assist developing countries (see articles by Sophia Twarog and Asad Naqvi).

### **Africa**

In Africa, there are almost than 900'000 hectares of certified organic agricultural land. This constitutes about three percent of the world's organic agricultural land. 530'000 producers were reported. The countries with the most organic land are Uganda (296'203), Tunisia (154'793 Hectares), and Ethiopia (140'308 hectares). The highest shares of organic land are in Sao Tome and Prince (5 percent), Uganda (2.3 percent) and Tunisia (1.6 percent). The majority of certified organic produce is destined for export markets, with the large majority being exported to the European Union, which is Africa's largest market for agricultural produce. The African market for organic products is still small. Three countries have an organic regulation and seven are in the process of drafting one. The first African Organic Conference, to be held in Kampala, Uganda, from May 19-22, 2009 will provide a good opportunity to mobilize support for organic agriculture (see chapter on organic farming in Africa by Hervé Bouagnimbeck).

### **Asia**

The total organic area in Asia is nearly 2.9 million hectares. This constitutes nine percent of the world's organic agricultural land. 230'000 producers were reported. The leading countries are China (1.6 million hectares) and India (1 million hectares). The highest shares of organic land of all agricultural land are in Timor Leste (seven percent). Organic wild collection areas play a major role in India and China.

Production of final processed products is growing, although a majority of production is still fresh produce and field crops with low value-added processing, such as dry or processed raw ingredients. Aquaculture (shrimp and fish) on the other hand, is emerging in China, Indonesia, Vietnam, Thailand, Malaysia and Myanmar. Textiles is another important trend. Sector growth is now also driven by imports, and local markets have taken off in many of the big cities in the South and Eastern part of region besides Japan, South Korea, Taiwan and Singapore. Kuala Lumpur, Manila, Bangkok, Beijing, Shanghai, Jakarta, Delhi, Bangalore and other cities are increasing internal consumption of organic products. Nine organic regula-

tions are in place. In seven countries work on national standards and regulations is in progress (see chapter by Ong Kung Wai on organic farming in Asia).

### **Europe**

As of the end of 2007, 7.8 million hectares in Europe were managed organically by more than 200'000 farms. In the European Union, 7.2 million hectares were under organic management, with more than 180'000 organic farms. 1.9 percent of the European agricultural area and four percent of the agricultural area in the European Union is organic. Twenty-four percent of the world's organic land is in Europe. The countries with the largest organic area are Italy (1'150'253 hectares), Spain (988'323 hectares) and Germany (865'336 hectares). The highest percentages are in Liechtenstein (29 percent), Austria (13 percent) and Switzerland (11 percent). Compared to 2006, organic land increased by more than 0.3 million hectares. Sales of organic products were approximately 16 billion Euros in 2007. The largest market for organic products in 2007 was Germany with a turnover of 5.3 billion Euros (2008: 5.8 billion Euros), followed by the UK (2.6 billion Euros), France and Italy (both 1.9 billion Euros). As a portion of the total market share, the highest levels have been reached in Austria, Denmark and Switzerland, with around five percent for organic products. The highest per capita spending is also in these countries.

Support for organic farming in the European Union and the neighboring countries includes grants under rural development programs, legal protection and a European as well as national action plans. One of the key instruments of the European Action Plan on organic food and farming, an information campaign, was launched during 2008, with the aim of increasing awareness of organic farming throughout the European Union. Furthermore, most EU member states have national action plans. In order to boost organic farming research, a technology platform joining the efforts of industry and civil society in defining organic research priorities and defending them vis-à-vis the policy-makers was launched in December 2008. The platform's vision paper reveals the potential of organic food production to mitigate some of the major global problems from climate change and food security, to the whole range of socio-economic challenges in the rural areas.

### **Latin America**

In Latin America, 220'000 producers managed 6.4 million hectares of agricultural land organically in 2007. This constitutes 20 percent of the world's organic land. The leading countries are Argentina (2'777'959 hectares), Brazil (1'765'793 hectares) and Uruguay (930'965 hectares). The highest shares of organic agricultural land are in the Dominican Republic and Uruguay with more than six percent and in Mexico and Argentina with more than two percent. Most organic production in Latin America is for export. Important crops are tropical fruits, grains and cereals, coffee and cocoa, sugar and meats. Most organic food sales in the domestic markets of the countries occurs in major cities, such as Buenos Aires and São Paulo.

Fifteen countries have legislation on organic farming, and four additional countries are currently developing organic regulations. Costa Rica and Argentina have both attained third country status according to the EU regulation on organic farming.

In recognition of the growing importance of the organic sector to Latin America's agricultural economy, governmental institutions have begun to take steps towards increasing involvement; governments are beginning to play a central role in the promotion of organic agriculture. The types of support in Latin American countries range from organic agriculture promotion programs to market access support by export agencies. In a few countries, limited financial support is being given to pay certification cost during the conversion period. An important process underway in many Latin America countries is the establishment of regulations and standards for the organic sector (see chapter on Latin America by Salvador Garibay).

#### **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 12'064. The major part of the organic land is in the US (1.6 million hectares in 2005). Seven percent of the world's organic agricultural land is in North America.

Valued at more than 20 billion US Dollars in 2007 (Organic Monitor), the North American market accounted for 45 percent of global revenues. 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 the U.S. by Barbara Haumann). The U.S. organic industry grew 21 percent in sales in 2006, and was forecast to experience 18 percent sales growth each year on average from 2007 through 2010. Whether this rate will actually be realized is uncertain due to the economic downturn and reduction in consumer spending in the last quarter of 2008. Likewise, a downturn is expected in Canada, even though the market growth in Canada, paired with the introduction of the new organic regulations, should provide a good outlook over the coming years.

In the United States, the National Organic Program has been in force since 2002. Canada has had a strong organic standard since 1999; this had been, however, voluntary and not supported by regulation. Canada's Organic Product Regulation will be fully implemented on June 30, 2009. Canadian labeling requirements will very similar to those of the US and the EU. In 2008, the new Farm Bill was passed by the US Congress. Increasing expenditures on organic agriculture and programs to approximately 112 million US Dollars<sup>1</sup> over the course of its five-year life, the 2008 Farm Bill provides a five-fold increase for the organic sector compared with federal funding in the previous bill.

#### **Oceania**

This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga and Vanuatu. Altogether, there are 7'222 producers, managing almost 12.1 million hectares. This constitutes 2.6 percent of the agricultural land in the area and 38 percent of the world's organic land. Ninety-nine percent of the organically managed land in the region is in Australia (12 million hectares, 97 percent extensive grazing land), followed by New Zealand (65'000 hectares) and Vanuatu (8'996 hectares). The highest shares of all agricultural land are in Vanuatu (6.1 percent), Samoa (5.5 percent) and the Solomon Islands

---

<sup>1</sup> Average exchange rate 2008: 1 US Dollar = 0.68341 Euros. Source: The OANDA homepage at [www.oanda.com](http://www.oanda.com)

(3.1 percent). Growth in the organic industry in Australia, New Zealand and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic markets are, however, growing. In New Zealand, a key issue is lack of production to meet growing demand.

Australia has had national standards for organic and biodynamic products in place since 1992, and like New Zealand, it is on the third country list of the European Union. It is expected that the Australian Standard, based on the National Standard employed since the early 1990s for the export market, will be adopted in 2009. In New Zealand, a National Organic Standard was launched in 2003. There is little government support to encourage organic agriculture in Australia. However, over the recent past, governments have been supportive of the Australian Standards issue. Furthermore, funding is made available to promote an understanding among consumers. In New Zealand, through the establishment of the sector umbrella organization Organics Aotearoa New Zealand and the Organic Advisory Programme as well as other initiatives, there is political recognition of the benefits of organic agriculture (see chapters on Australia and New Zealand by Els Wynen and Seager Mason).

In the Pacific Islands work on a regional strategy and national plans to lay the foundation of sustainable organic agriculture development in the region is in progress. The Regional Organic Task Force, a technical group representing all sectors and countries involved in organics, was charged with developing the Pacific Standard and will be responsible for implementing the Regional Action Plan. Pacific High Level Organics Group consists of Pacific leaders who have shown a commitment to the development of organic agriculture in the region and provide high level political support and advocacy. The first Pacific Organic Standard was endorsed by Pacific Leaders in September 2008. This provides a platform for further regional policy development around organic agriculture (see chapter on the development of organic agriculture in the Pacific region by Karen Mapusua).

#### ***Developments within IFOAM***

Under the leadership of its new World Board, elected at the general assembly in Vignola, Italy, in June 2008, the International Federation of Organic Agriculture Movements (IFOAM) will continue to work on further enhancing organic growth in 2009, through advocacy, the facilitation of trade, and capacity building. In particular, IFOAM will be working on a new leadership program: Education and training, both vocational and academic, play an important role in disseminating the benefits of organic agriculture at all levels.

The 1<sup>st</sup> International IFOAM Conference on Animal and Plant Breeding 'Breeding Biodiversity' will bring both animal and plant breeding together in 2009 for one international conference with the aim of explicitly highlighting the important interdependences and holistic approaches of organic agriculture.