



Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2013 Part 1: Global data and survey background

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Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February 2013

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- › Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, in cooperation with the International Federation of Organic Agriculture Movements IFOAM, based on national data sources and data from certifiers.
- › Supported by: Swiss State Secretariat of Economic Affairs (SECO) and NürnbergMesse, the organisers of the BioFach World Organic Trade Fair
- › Data as published February 2013 in FiBL & IFOAM (2013) The World of Organic Agriculture. Statistics and Emerging Trends 2013. Frick and Bonn
- › For updates check www.organic-world.net
- › This presentation is available online at: <http://www.organic-world.net/yearbook-2013-presentations.html>
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- › © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2013



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Swiss Confederation

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



The Global Survey on Organic Agriculture: Supporters

- › The Swiss State Secretariat of Economic Affairs SECO, Berne



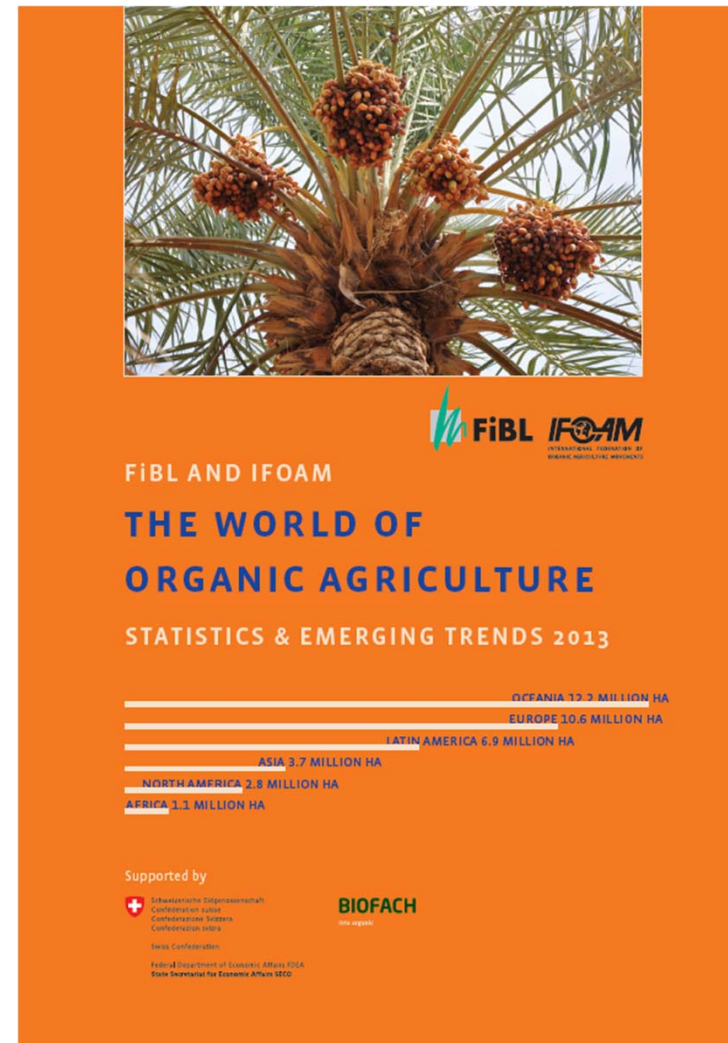
- › Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair



- › 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2013.

The World of Organic Agriculture 2013

- › The 14th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2013.*
- › Contents:
 - › Results of the survey on organic agriculture worldwide;
 - › Organic agriculture in the regions and country reports;
 - › Albania, Australia, Canada, Hungary, Kosovo, Montenegro, the Pacific Islands, Saudia Arabia, Serbia and The United States of America.
 - › Chapters on the global market, standards & legislations, voluntary standards , PGS and European market
 - › Numerous tables and graphs.
 - › The book can be ordered via IFOAM.org and shop.FiBL.org.
 - › *Willer, H, Lernoud, J, and Kilcher, L. (2013) The World of Organic Agriculture. Statistics and Emerging Trends 2013. FiBL, Frick, and, IFOAM, Bonn



Website www.organic-world.net

- › Detailed statistics in excel format (in progress)
- › Graphs & Maps
- › Data revisions
- › News and background information

The screenshot shows the homepage of the Organic World website. The header includes the title 'Organic World' and the subtitle 'Global organic farming statistics and news'. A navigation menu contains links for Home, News, About, Statistics, Yearbook, Country info, Password area, and Contact / Site info. The main content area features a list of editions from 2013 down to 2000-2007, a search bar, and a section for 'The World of Organic Agriculture 2013'. This section includes a brief announcement about the book's launch at BioFach 2013, a detailed description of the book's content, and a list of countries covered in the volume. The footer contains logos for FIBL, International Trade Centre, and IFoAM, along with a copyright notice for FIBL dated 16/01/2013. On the right side, there is a separate image of the book cover for 'The World of Organic Agriculture 2013' with a 'Print page' link below it.

About this presentation

- › There are 3 presentations summarizing the key results of the FiBL-IFOAM survey on organic agriculture worldwide 2013 (data 2011). Apart from the global data, key results on crop and on regional data are presented.
- › More information is available at the password area of www.organic-world.net
- › The following three presentations are available at <http://www.organic-world.net/yearbook-2013-presentations.html>:
 - › Part 1: Global data 2011 and survey background
 - › Part 2: Land use and key crops in organic agriculture 2011
 - › Part 3: Organic agriculture in the regions 2011

The 14th Survey on organic agriculture worldwide

- › The 14th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in cooperation with the International Federation of Organic Agriculture Movements (IFOAM) and further partners.
- › The survey was carried out between July 2012 and February 2013.
- › Data were received from 162 countries.
- › New countries included: Dominica, Guinea Bissau, Kosovo and Tonga.
- › Updated data on area and producers were available for 135 countries.,
- › Data were provided by almost 200 country experts (representatives from NGOs, certification bodies, governments, researchers).
- › The following data were collected: Area data (including land use and crop details); Producers, other operator types; Domestic market values; Export and imports data; Livestock data (animal heads and production tones);
- › The results are published in the yearbook “The World of Organic Agriculture 2013” and at www.organic-world.net.

Countries and territories covered by the global survey on organic agriculture 2011

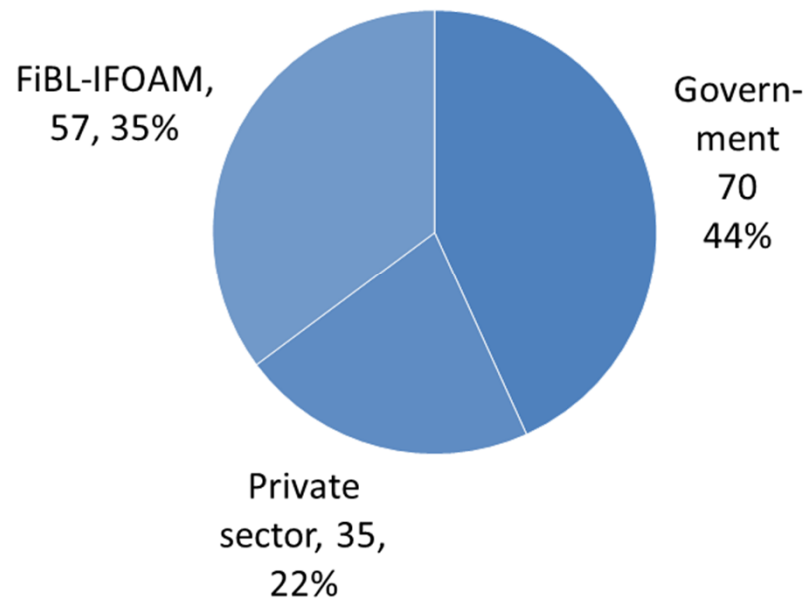
Table 1: Countries and territories covered by the global survey on organic agriculture 2011

	Countries* with data on organic agriculture	Countries per region ¹	Share of countries that provided data (%)
Africa	37	57	65
Asia	37	49	76
Europe	46	46	100
Latin America and Caribbean	29	45	64
North America	2	5	40
Oceania	11	23	49
World	162	224	72

Source: FiBL-IFOAM Survey 2013

*Where the designation "country" appears in this book, it covers countries or territories.

Organic data collection systems world-wide 2011 for data on area, operators and production (total 162 countries)



- › Government collection systems (70 countries)
 - › Data from the certifiers
 - › Census/farm structure survey
 - › Direct payments
- › Private collection systems (35 countries)
 - › Data from the certifiers
 - › Company data
- › No collection system (55 countries)
 - › FiBL and IFOAM collect the data from the international certifiers

International certifiers that provided data for several countries (2011 data)



CONTROL UNION CERTIFICATIONS



Soil Association

Networks, transnational data collection efforts



General notes on the data

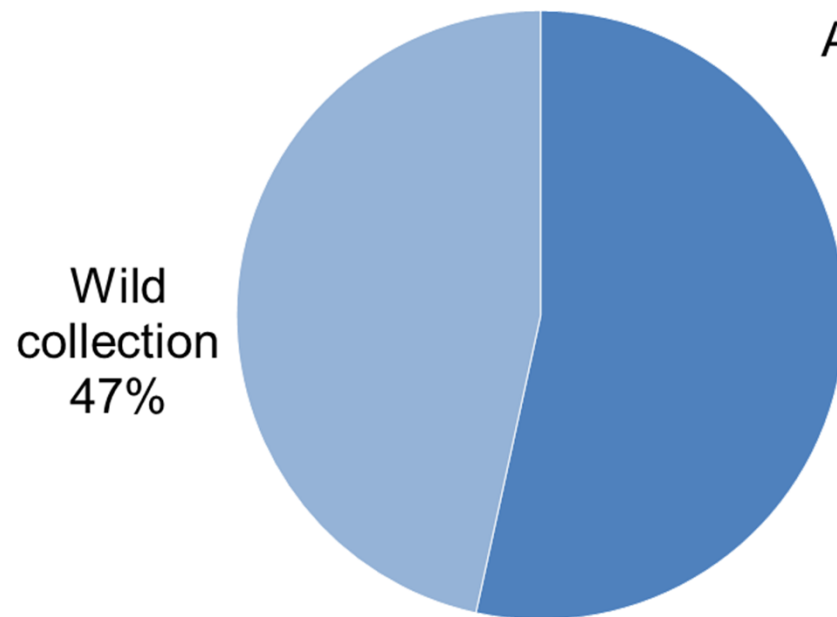
- › Data sources: For data sources see annex of The World of Organic Agriculture 2013 or www.organic-world.net/statistics-data-sources.html
- › Countries: For countries and areas, FiBL and IFOAM used the Standard Country and Area Codes Classifications as defined by the United Nations Statistics division.
- › Term organic: In the tables, the term organic refers to the fully converted and in-conversion areas.
- › Share of total agricultural land: In some cases the calculation of the shares of organic agricultural land, based on the Eurostat and FAOSTAT data, might differ from the organic shares obtained from ministries or local experts.
- › Producers: Some countries report the number of smallholders, and others only the numbers of companies, projects or grower groups, which may each comprise a number of producers.
- › Data revisions: Should data revisions and correction become necessary these are communicated at the [data revision pages](http://www.organic-world.net/statistics-data-revisions.html) of Organic-World.net: <http://www.organic-world.net/statistics-data-revisions.html>.

Key data/indicators on organic agriculture world-wide 2011

- › 162 countries have data on organic agriculture.
- › 37.2 million hectares of agricultural land are organic (including conversion areas).
- › 10 countries have more than ten percent organic agricultural land, and 15 countries have between 5 and 10 percent organic agricultural land.
- › There are 32.5 million hectares of further, non agricultural areas.
- › 1.8 million producers were reported.

Definition of organic areas

Source: FiBL-IFOAM Survey 2013

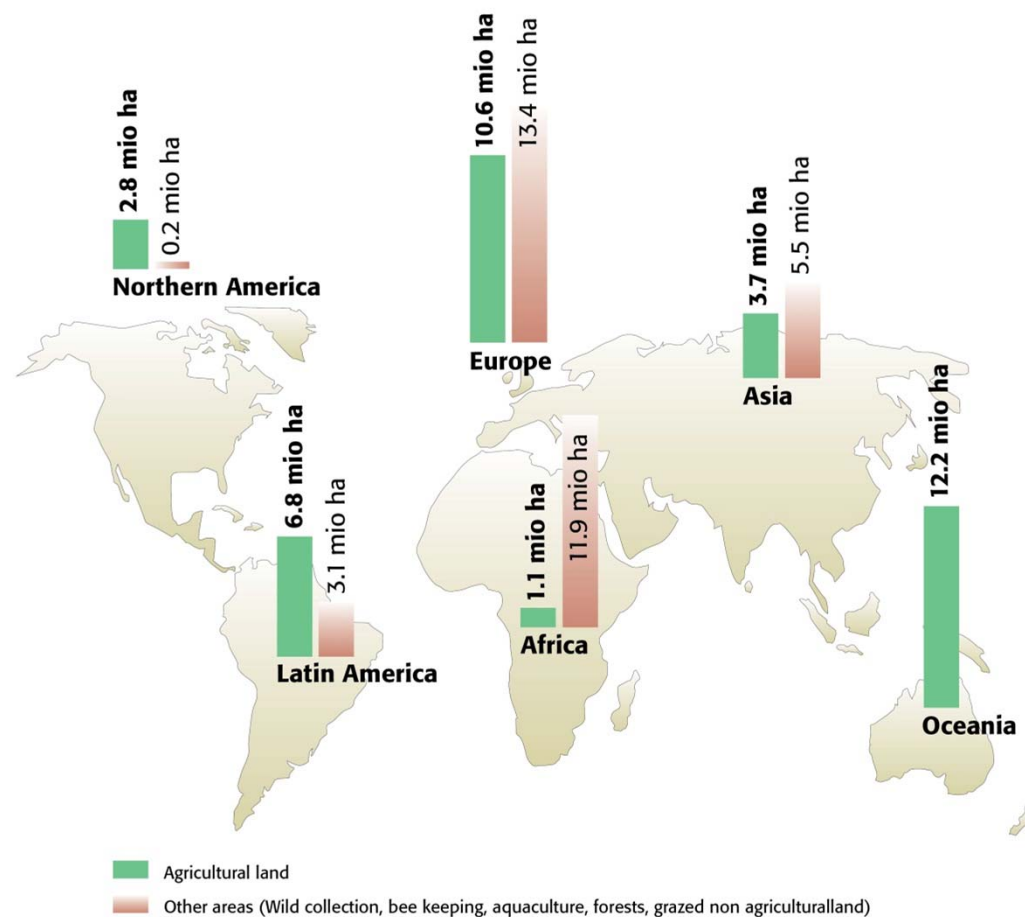


- › Agricultural land (37.2 million hectares in 2011)
 - › Cropland
 - › **Arable land** (cereals, vegetables etc.)
 - › **Permanent crops** (fruit, grapes, olives ...)
 - › **Cropland, no details** (=arable land and permanent crops with no further details)
 - › Permanent grassland
 - › Other agricultural land
- › Non-agricultural areas (32.5 million hectares in 2011)
 - › Wild collection/Bee keeping
 - › Forest
 - › Aquaculture
 - › Grazing areas on non-agricultural land

Organic agricultural land by region 2011

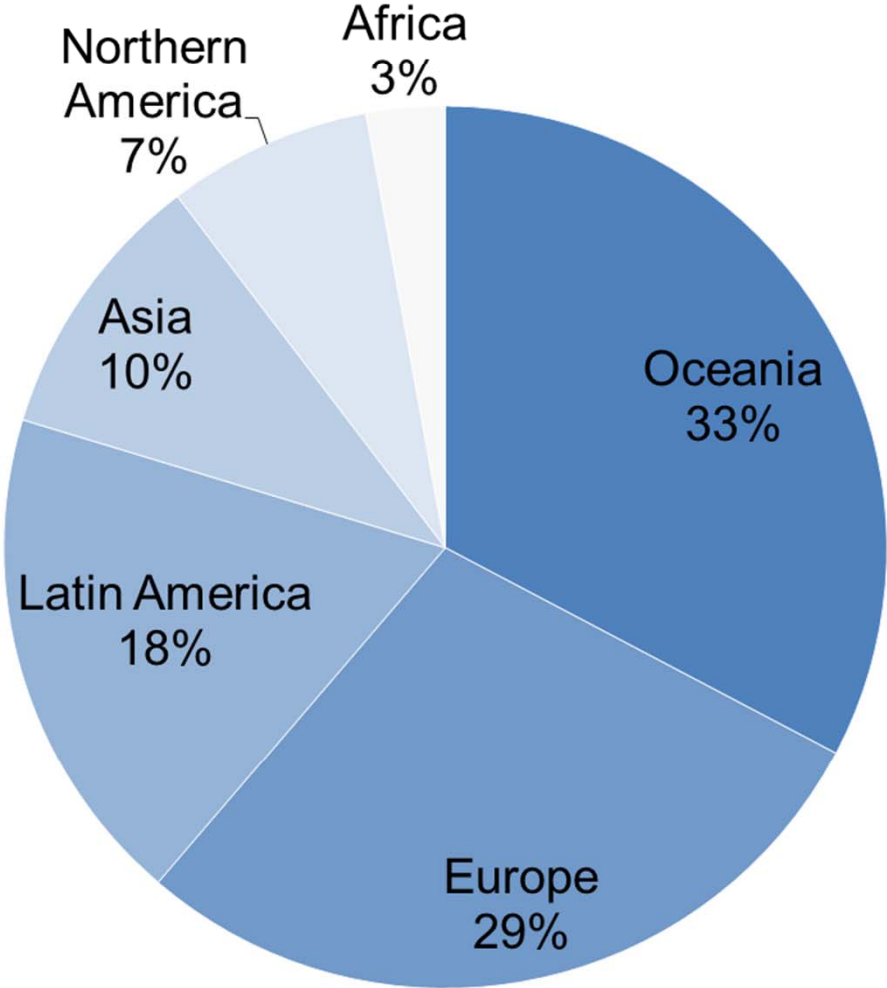
- › Currently 37.2 million hectares are under organic agricultural management (end of 2011 for most data).
- › The distribution of the organic agricultural land is as follows:
 - › Oceania (12.2 million hectares);
 - › Europe (10.6 million hectares);
 - › Latin America (6.9 million hectares),
 - › Asia (3.7 million hectares),
 - › North America (2.8 million hectares), and
 - › Africa (1.1 million hectares).
- › Oceania has almost one-third of the global organic agricultural land, but its relative importance is decreasing. Europe, a region that has had a very constant growth of organic land over the years, has more than one quarter of the world's organic agricultural land. The share of Latin America is slightly lower than that of Europe (18 percent).
- › In addition to the agricultural land, there are 32.5 million hectares of non-agricultural areas, mainly wild-collection.

Organic agricultural land and other organic areas 2011



Distribution of organic agricultural land by region 2011

Source: FiBL-IFOAM Survey 2013

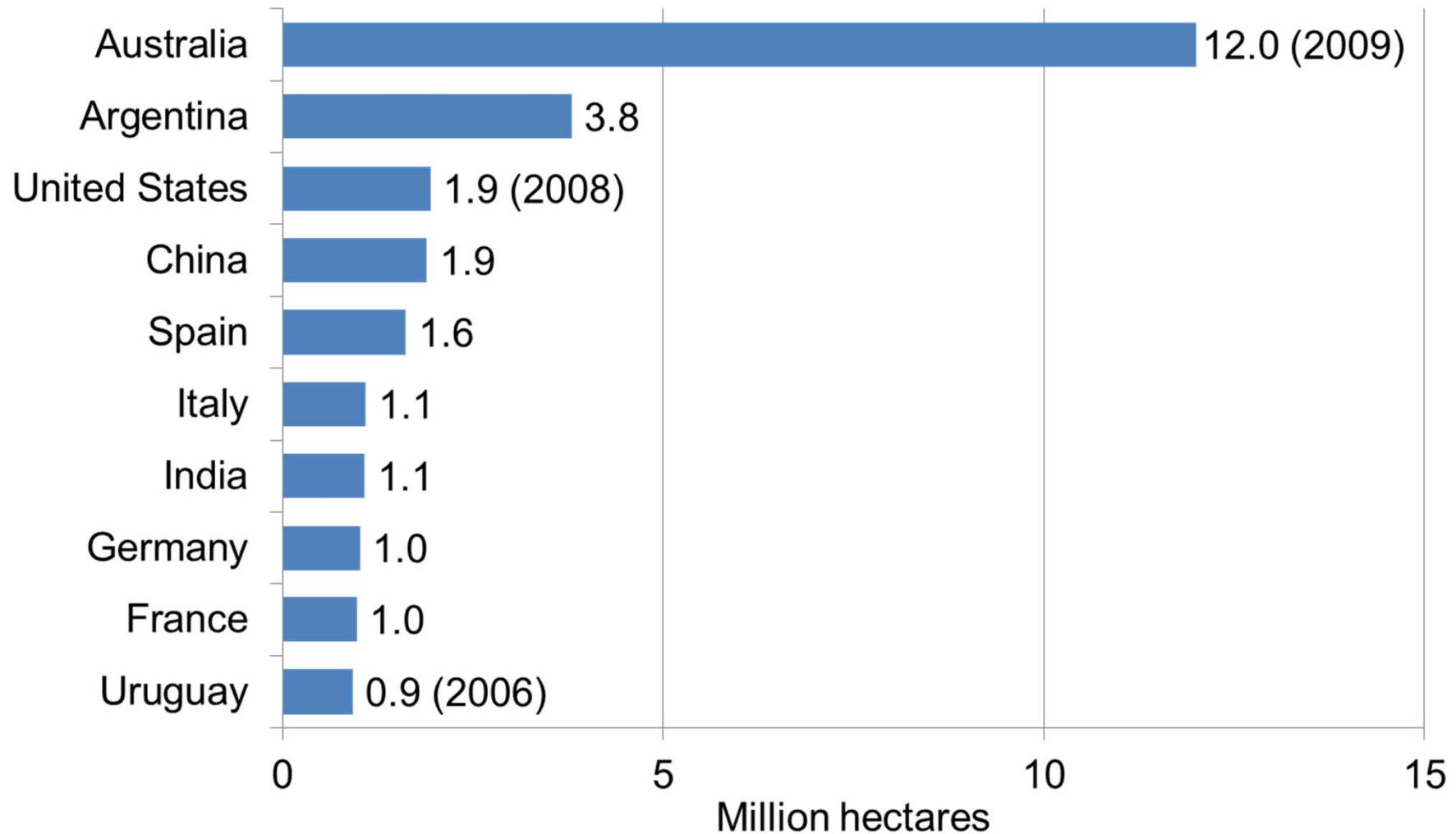


The countries with the most organic agricultural land 2011

- › Australia is the country with the most organic agricultural land, 97 percent of which is extensive grazing area.
- › Argentina is second, followed by the United States in third place.
- › The ten countries with the most organically managed agricultural land have a combined total of 26.3 million hectares, constituting almost seventy percent of the world's organic agricultural land.

The ten countries with the largest organic agricultural land 2011

Source: FiBL-IFOAM survey 2013



Share of organic land of total agricultural area 2011

- › The share of the world's organic agricultural of all agricultural land is 0.9 percent.
- › By region, the share is highest in Oceania (2.9 percent), followed by Europe with 2.2 percent and Latin America with 1.1 percent.
- › In the 27 countries of the European Union, the share of organically managed land is 5.4 percent. In the other regions, the share of organically managed land is less than one percent.
- › Seven countries have more than 10 percent organic land and 15 countries have between 5 and 10 percent organic land.
- › However, 64 percent of the countries for which data are available have less than one percent organic agricultural land.
- › The country with the highest share is the Falkland Islands (Malvinas), where several large sheep farms are working organically, followed by Liechtenstein (29.3 percent) and Austria (19.7 percent).
- › It is interesting to note that many island states have high shares.

Share of organic agricultural land by region 2011

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2011

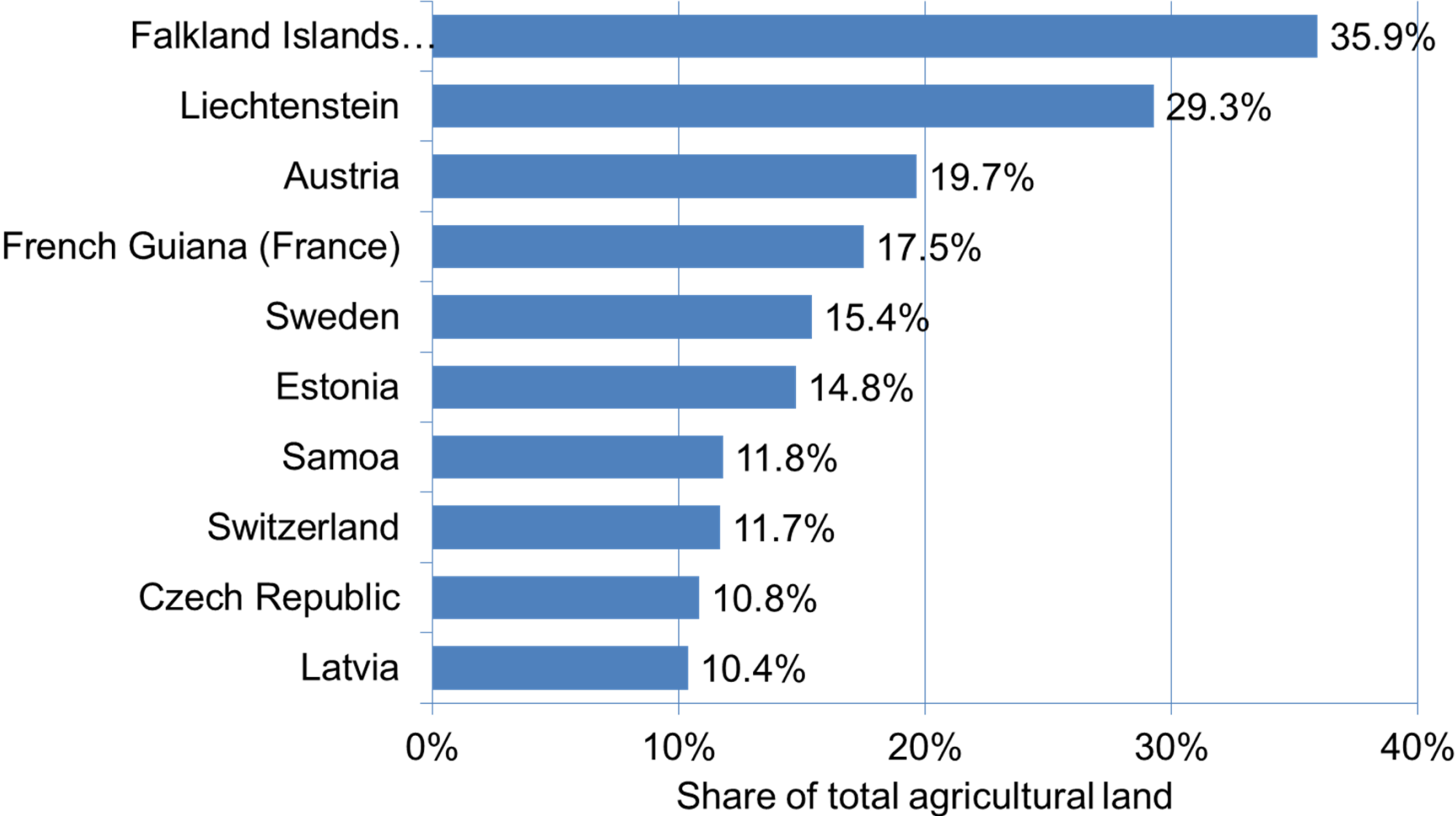
Continent	Organic agr. land [ha]	Share of total agr. land*
Africa	1'073'657	0.1%
Asia	3'706'280	0.3%
Europe	10'637'128	2.2%
Latin America	6'857'611	1.1%
Northern America	2'790'162	0.7%
Oceania	12'185'843	2.9%
Total**	37'245'686	0.9%

Source: FiBL-IFOAM Survey 2013.

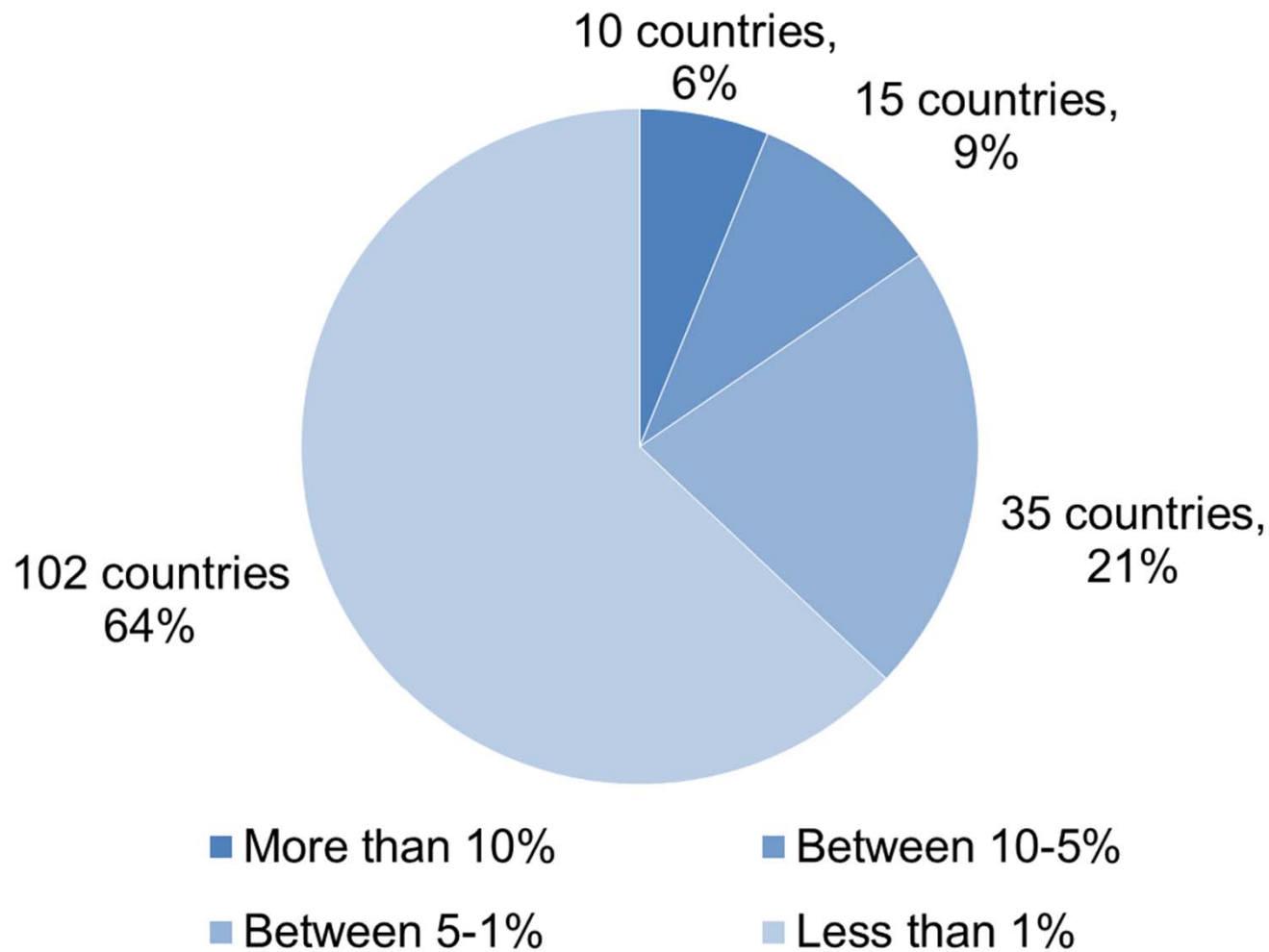
*For the calculation of the shares of total agricultural land, only the countries that are included in the survey were used.

** Total includes correction value for French overseas departments.

The ten countries with the highest shares of organic agricultural land 2011



Distribution of organic shares of the total agricultural areas 2011 (total countries 162)



Growth of the organic agricultural land 2011

- › Compared with the revised data from 2010, the organic agricultural land has increased by 3 percent in 2011.
- › Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has more than trebled.

Growth of the organic agricultural land 2010-2011 by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2010/2011

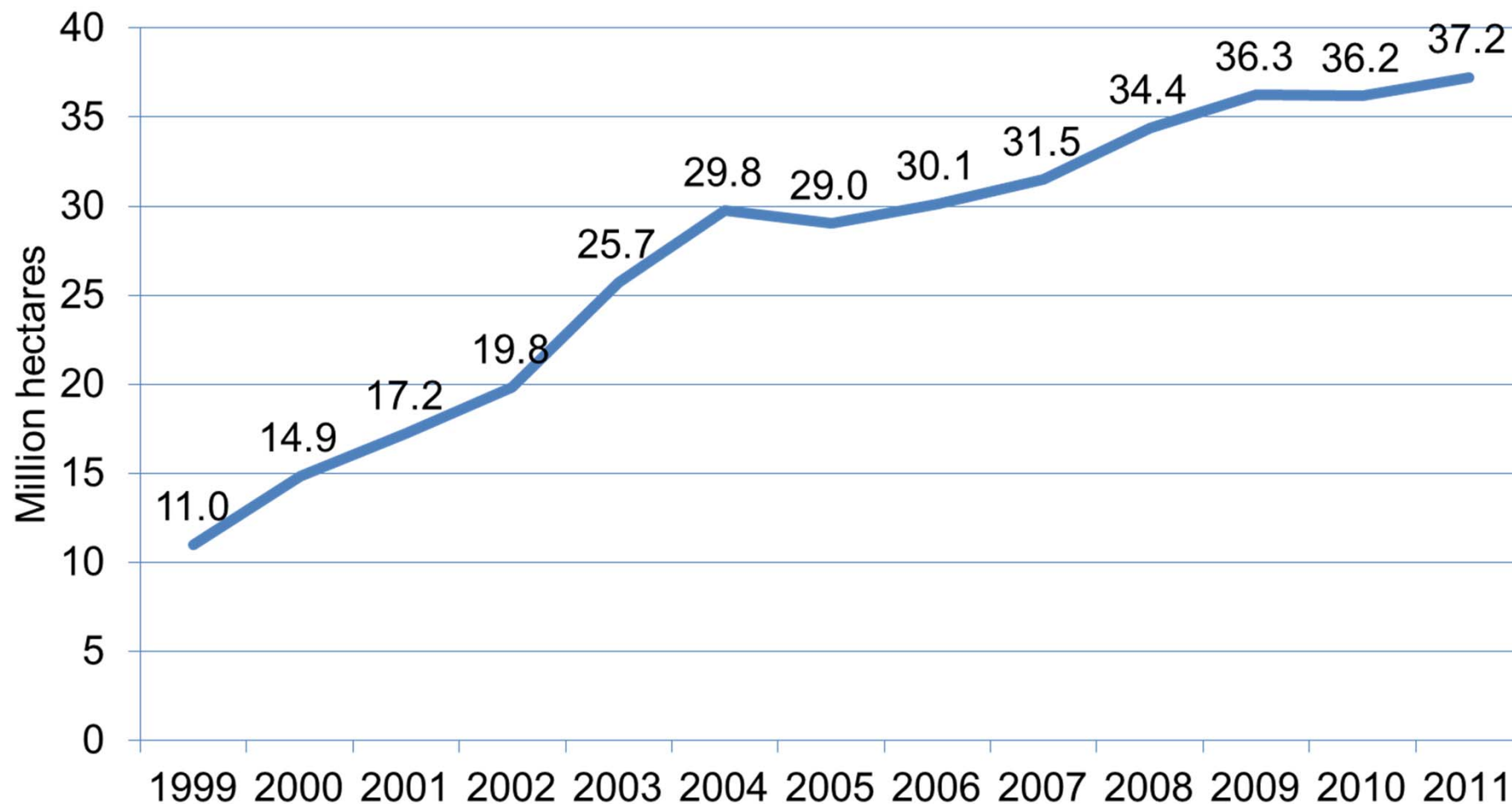
Region	Organic agr. land (hectares) 2010	Organic agr. land (hectares) 2011	+/- in hectares	+/- percent %
Africa	1'075'830	1'073'657	-2'174	-0.2%
Asia	2'756'887	3'706'280	+949'392	+34.4%
Europe	10'002'087	10'637'128	+635'041	+6.3%
Latin America	7'543'578	6'857'611	-685'968	-9.1%
Northern America*	2'652'624	2'790'162	+137'538	+5.2%
Oceania	12'145'030	12'185'843	+40'812	+0.3%
Total**	36'173'766	37'245'686	+1'071'919	+3.0%

Source: FiBL-IFOAM Survey 2013, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 322.

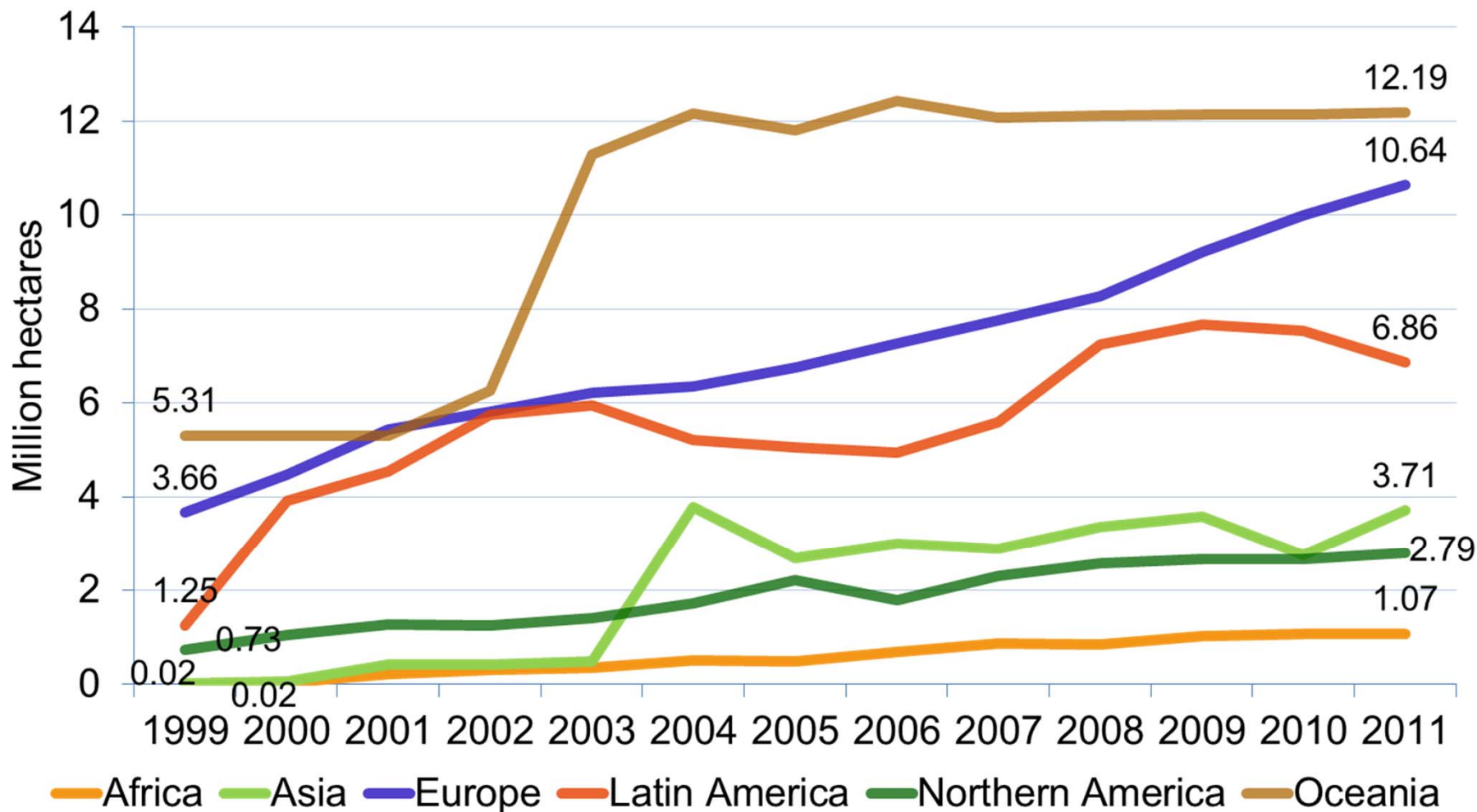
* For the United States the latest available data are from 2008.

** Total includes correction value for French Overseas Departments.

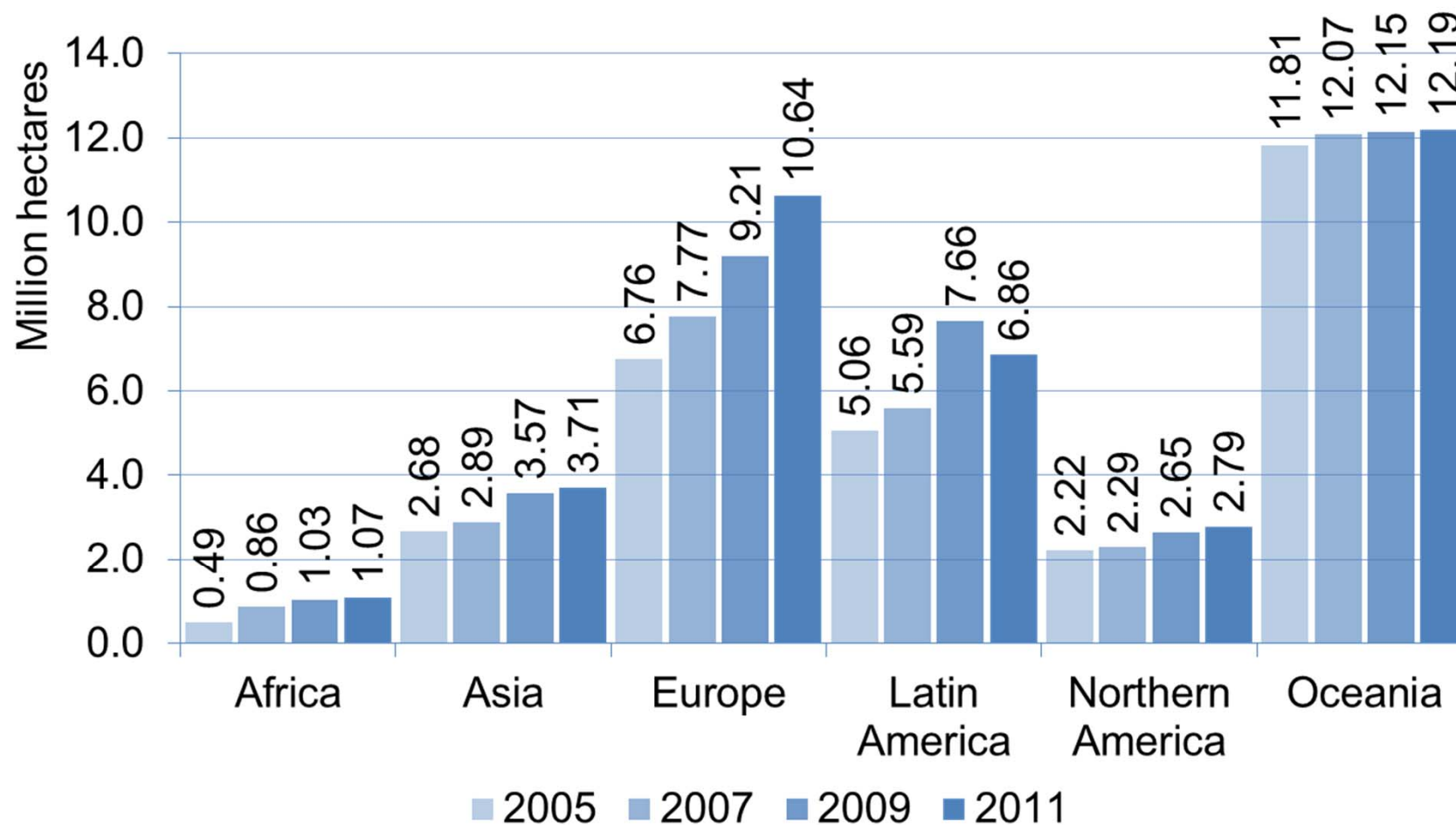
World: Development of organic agricultural land 1999-2011



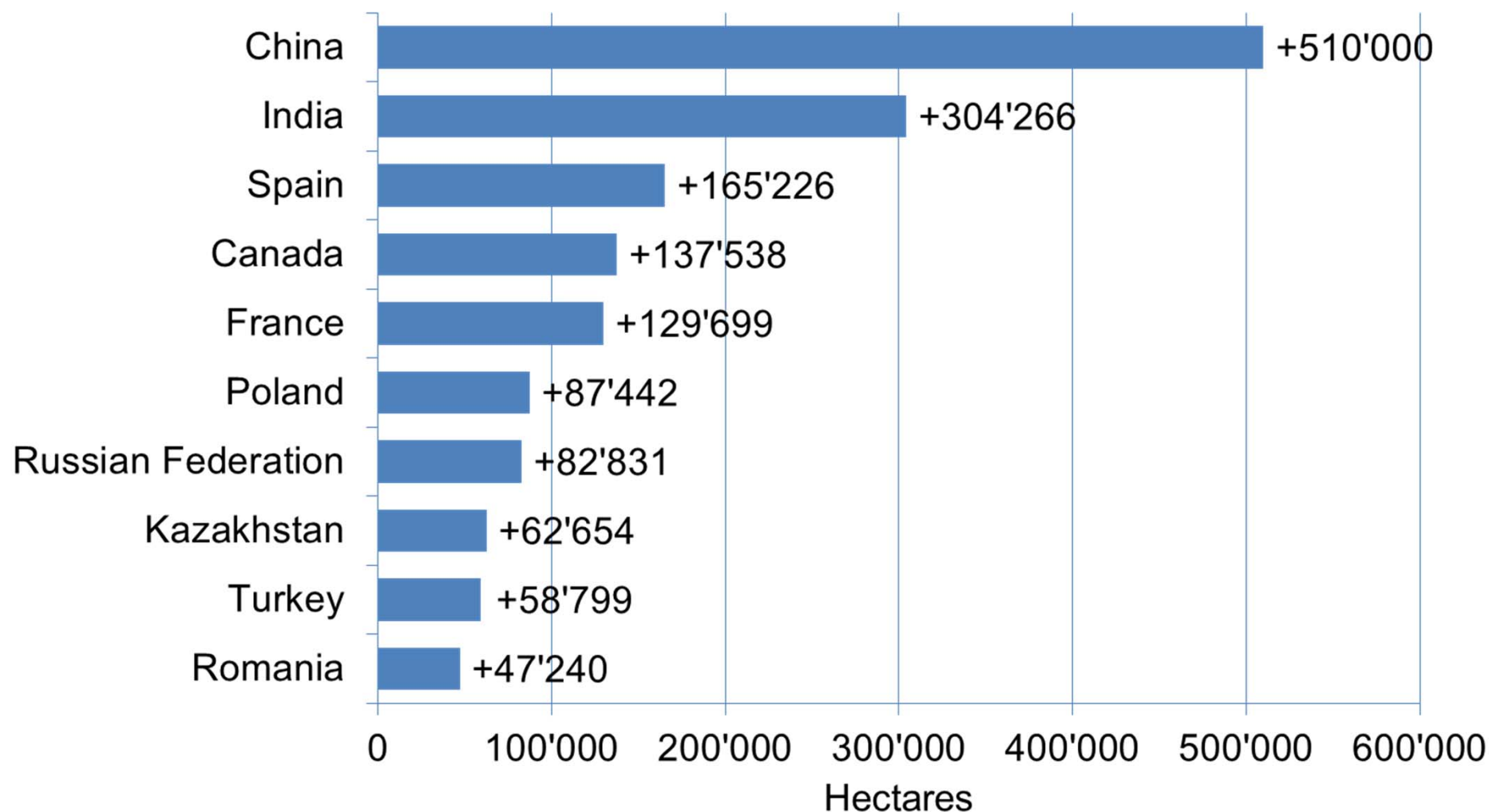
Development of organic agricultural land in the regions 1999-2011



World: Development of organic agricultural land 2005 to 2011 by continent



The ten countries with the highest increase of organic agricultural land 2010-2011 (in hectares)



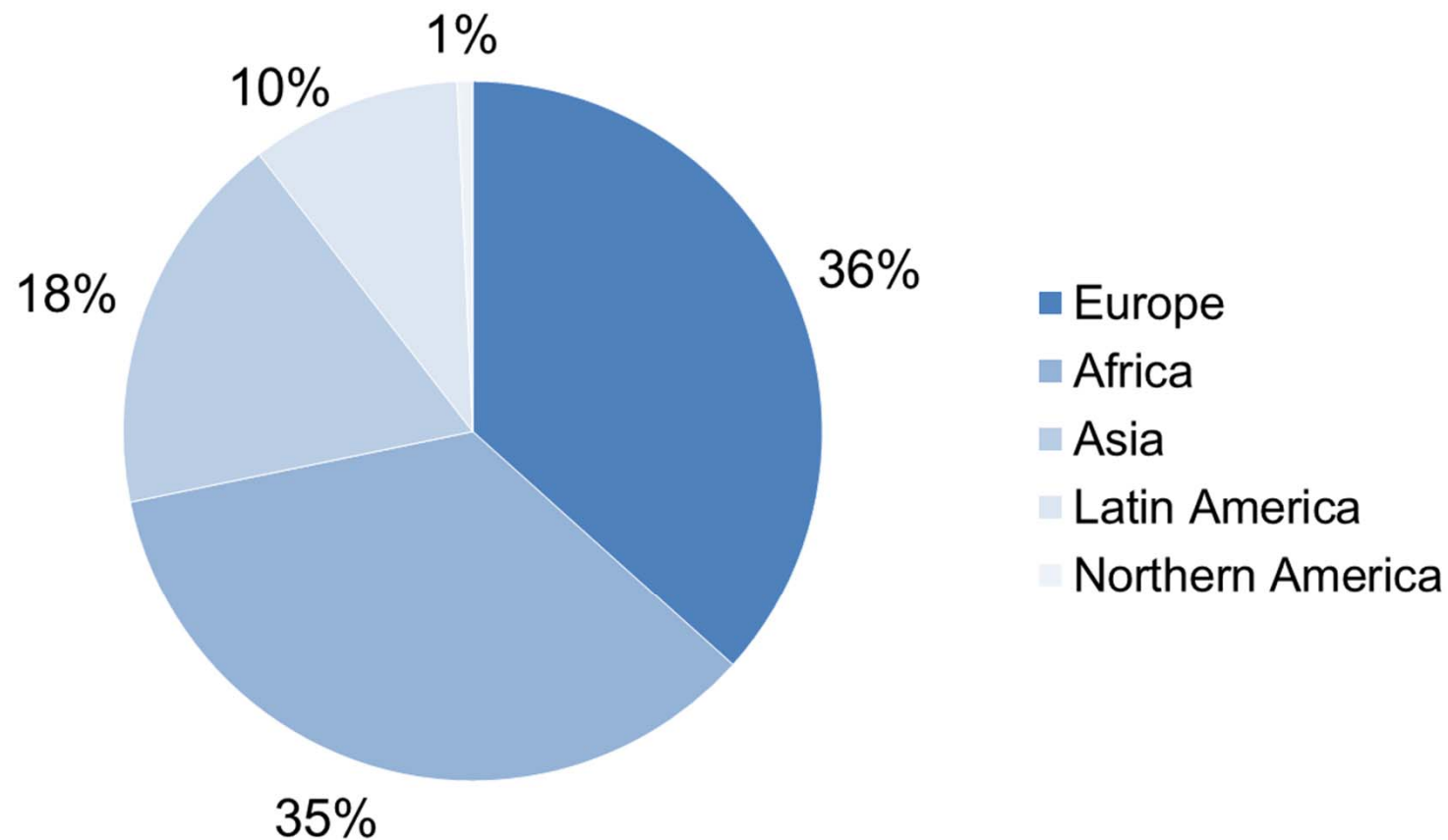
Further organic areas

- › Apart from the organic agricultural land there are further organic areas, the largest part of these are wild collection areas and areas for beekeeping,
- › Further areas are aquaculture, forest and grazing areas on non-agricultural land.
- › It should be noted, that many countries do not report these areas, as they only communicate the agricultural land.
- › The total area for these areas was 32.5 million hectares.
- › In total, 69.7 million hectares – agricultural land and other areas – were organic in 2011.

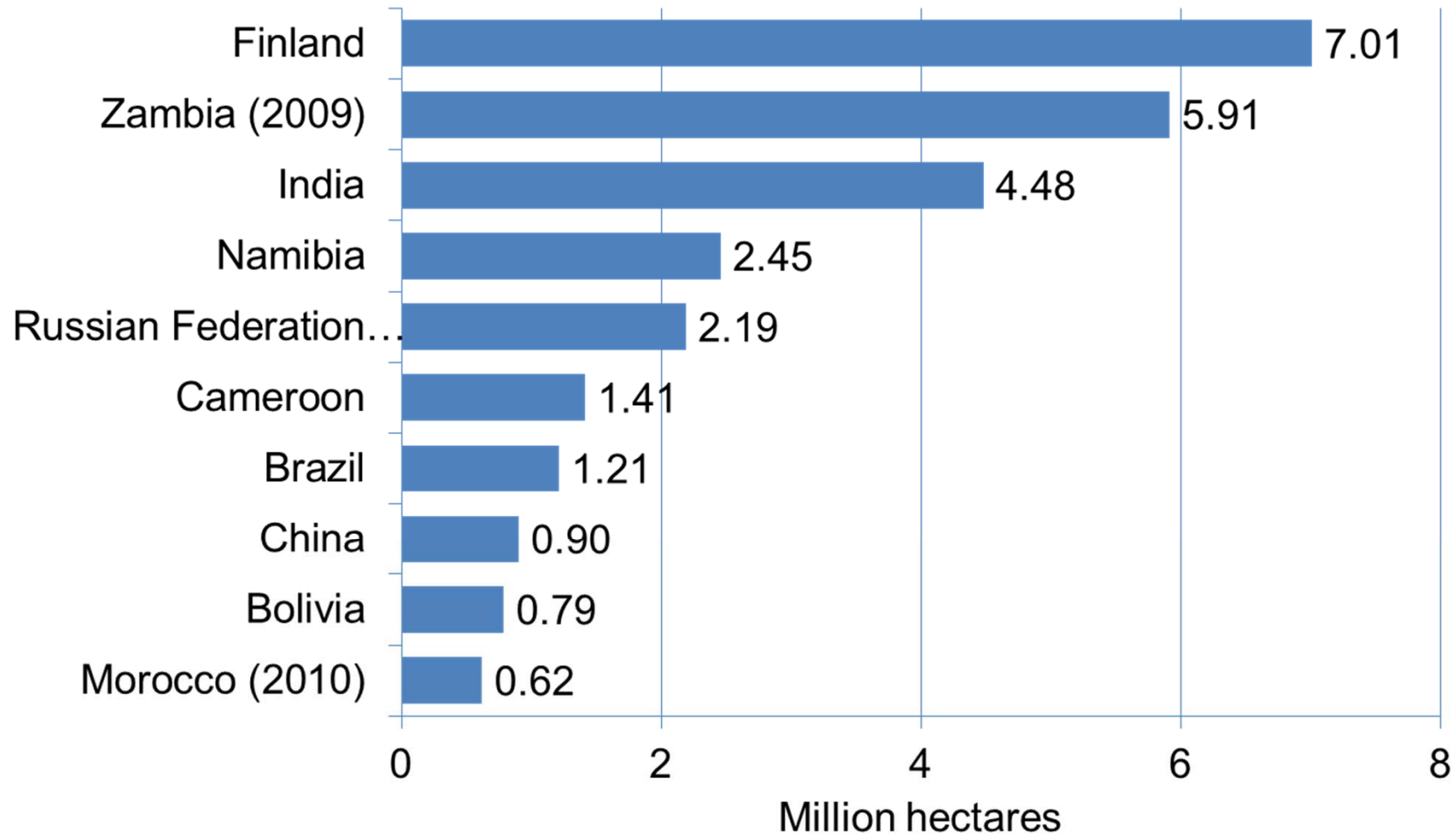
Wild collection and beekeeping areas

- › 31.6 million hectares of wild collection and bee-keeping areas were reported for 2011.
- › The wild collection / bee-keeping areas are more or less evenly distributed over four regions: Europe, Africa, Asia, and Latin America, reflecting quite a different pattern than that for agricultural land.
- › The collection of wild harvested crops is defined in the IFOAM Basic Standards (IFOAM 2006), and wild collection activities are regulated in organic laws.

Distribution of organic wild collection areas by region 2011



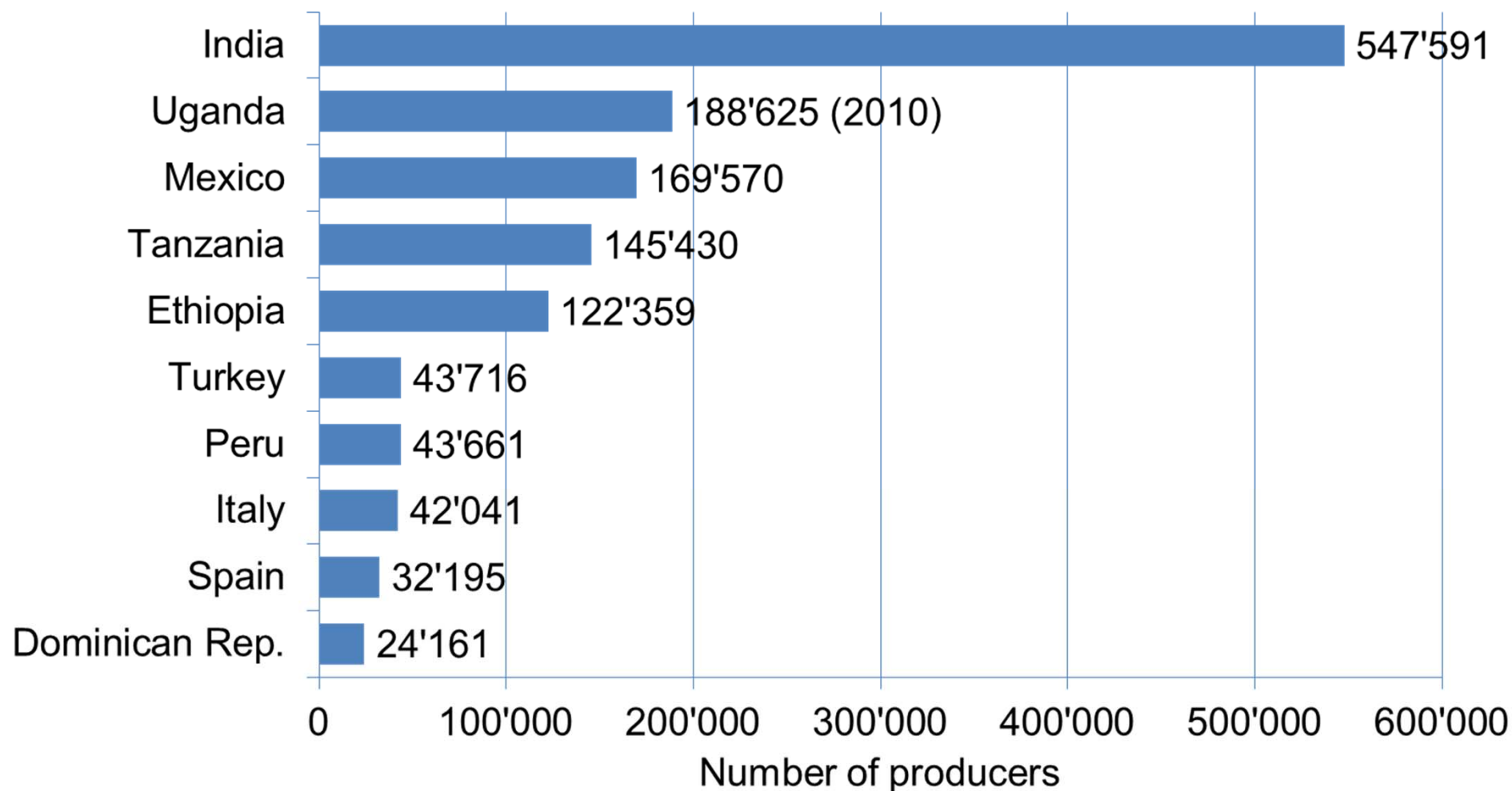
Organic wild collection: The ten countries with the largest wild collection areas (including bee-keeping) 2011



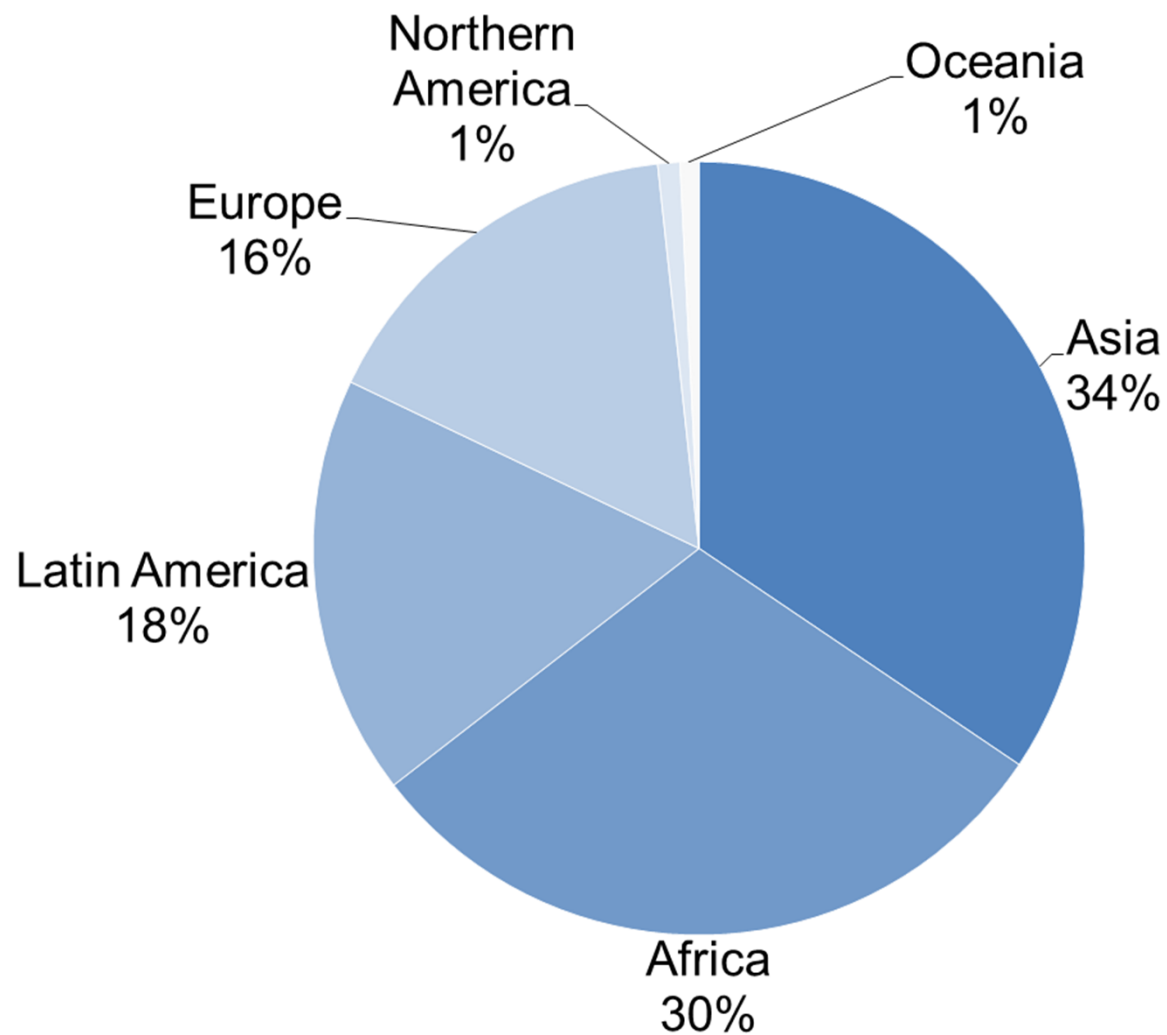
Organic producers 2011

- › For the current survey, a total of 1.8 million organic producers was reported,
- › According to the data obtained, more than three quarters of the producers are located in Asia, Africa and Latin America.
- › The country with the most producers is India (547'591), followed by Uganda (188'625) and Mexico (169'570).
- › This is an increase of more than 0.2 million producers compared with 2010, or 12 percent.
- › It should be noted that not all certifiers reported the number of producers; the number is probably higher than 1.8 million.

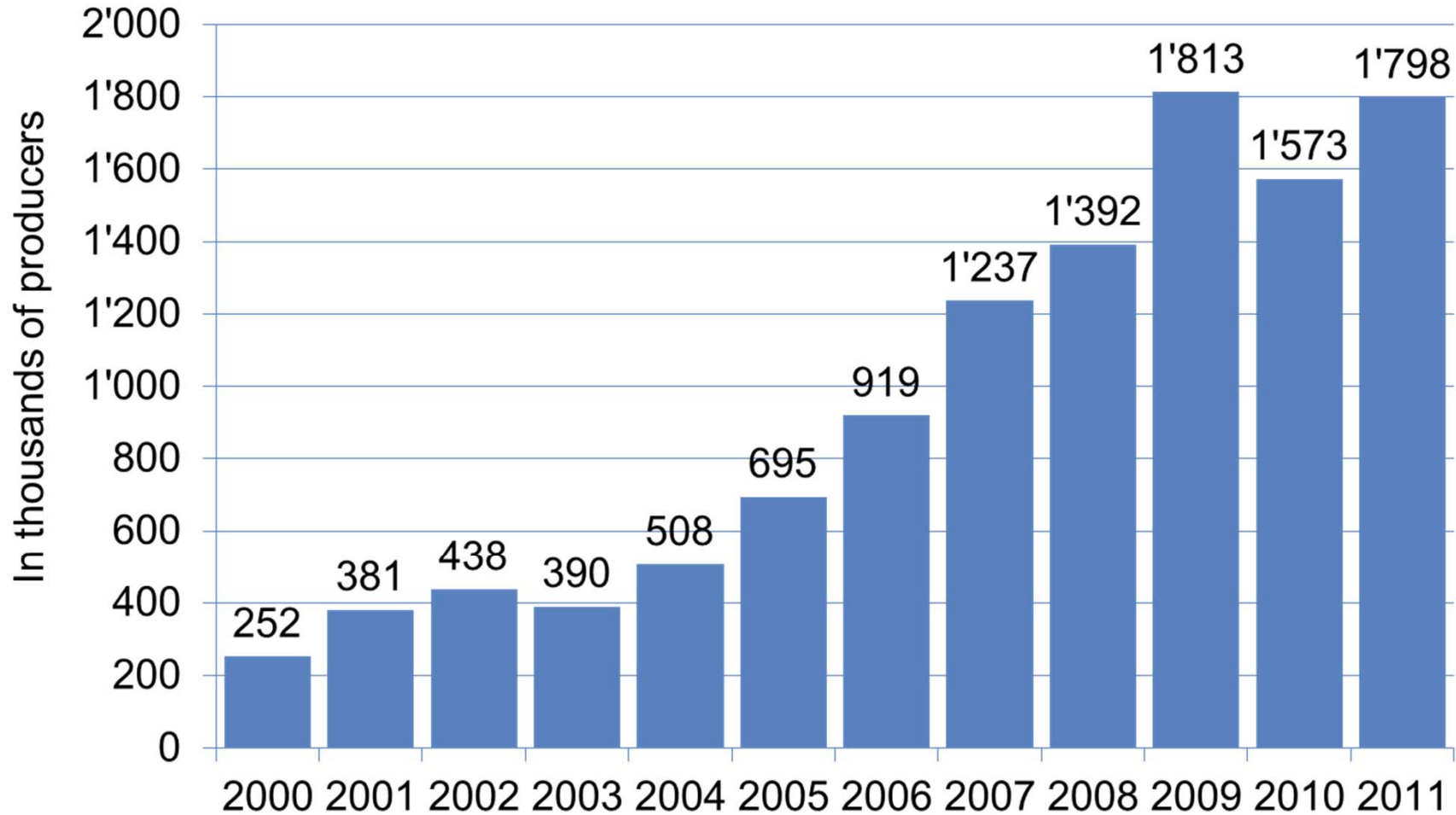
The ten countries with the largest numbers of organic producers 2011



Organic producers by region 2011 (total: 1.8 million)



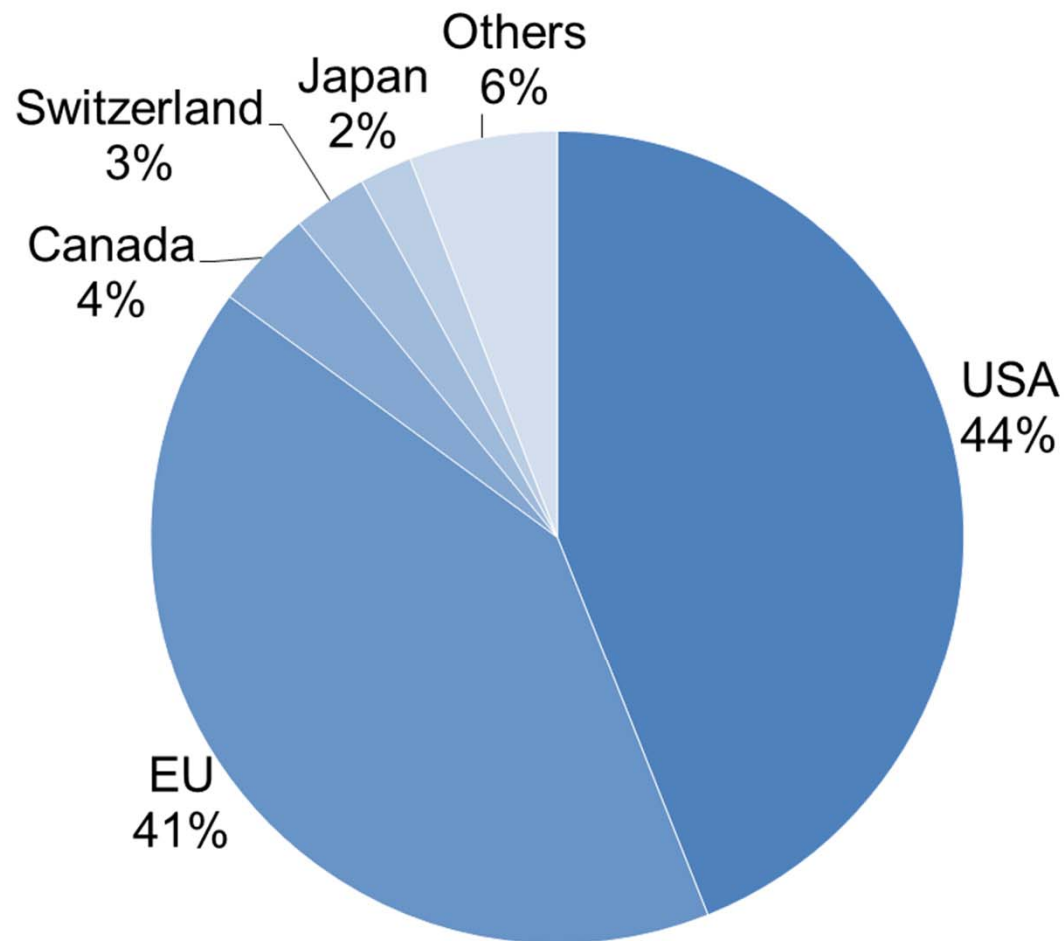
World: Development of organic producers 2000-2011



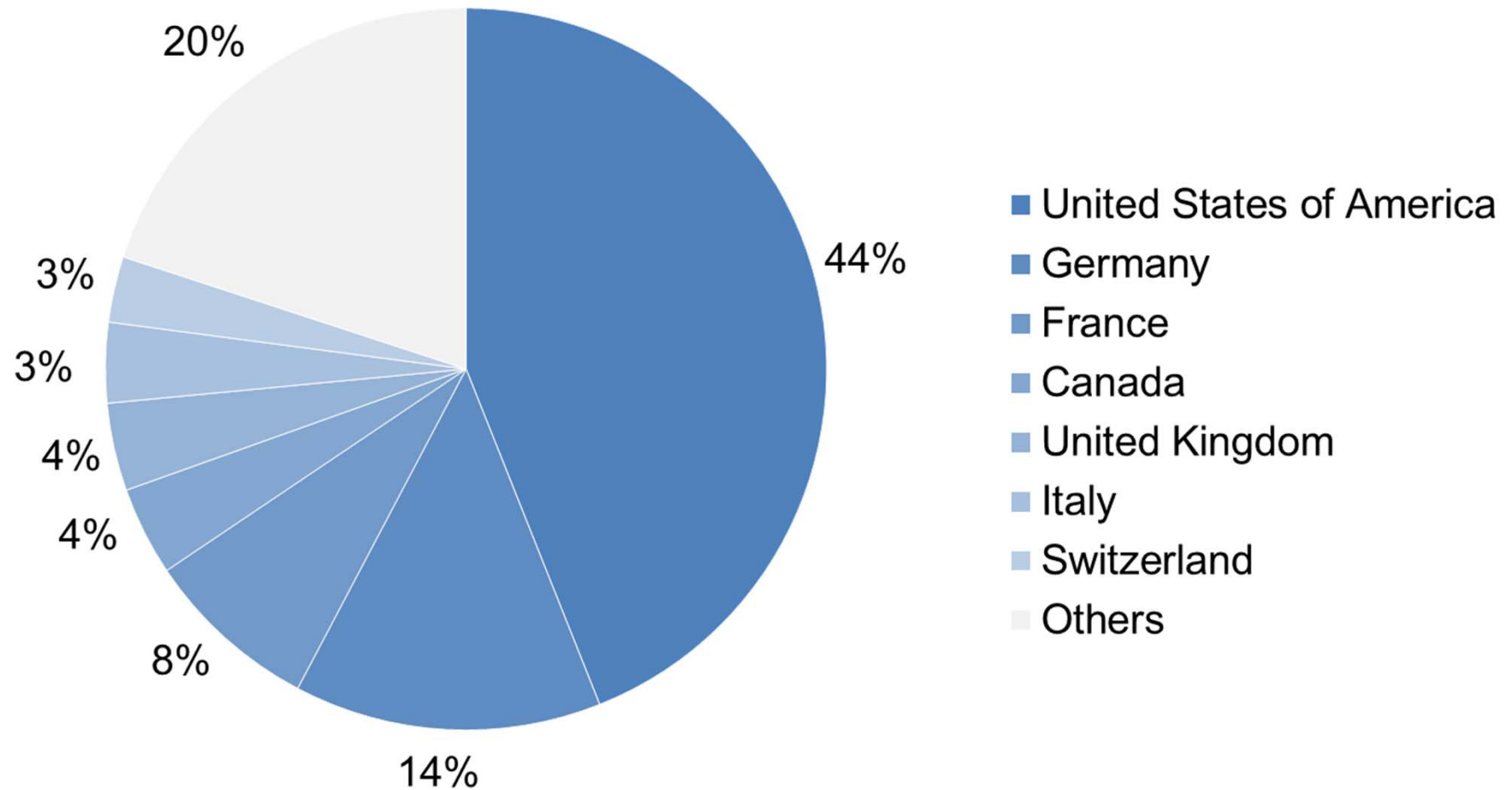
The global market for organic food and beverages 2011

- › In 2011, the global market for certified organic food and drink was estimated to be 63 billion US Dollars according to Organic Monitor (Sahota 2013).
- › The turnover with organic products has more than fourfold since 1999, when it was estimated to be 15 billion US Dollars. With the economic crisis the growth slowed down in 2009 in many countries. However, in 2011, the organic market grew at higher rates again (Sahota 2013).
- › More than ninety percent of the organic product revenues is made in the Northern hemisphere. (Sahota 2013)
- › In 2011, the by far largest market was the United States with 21 billion euros of organic food sales, followed by Germany with 6.6 billion euros and France with 3.8 billion euros (FiBL-AMI-IFOAM 2013).
- › The highest annual per capita consumption was in Switzerland (177 euros) and in Denmark (162 euros) (FiBL-AMI-IFOAM 2013).
- › Denmark, Switzerland and Austria have the highest share of organic food sales. In 2011 total food market value was not available for most of the countries, and the organic share was not possible to calculate for most of them.

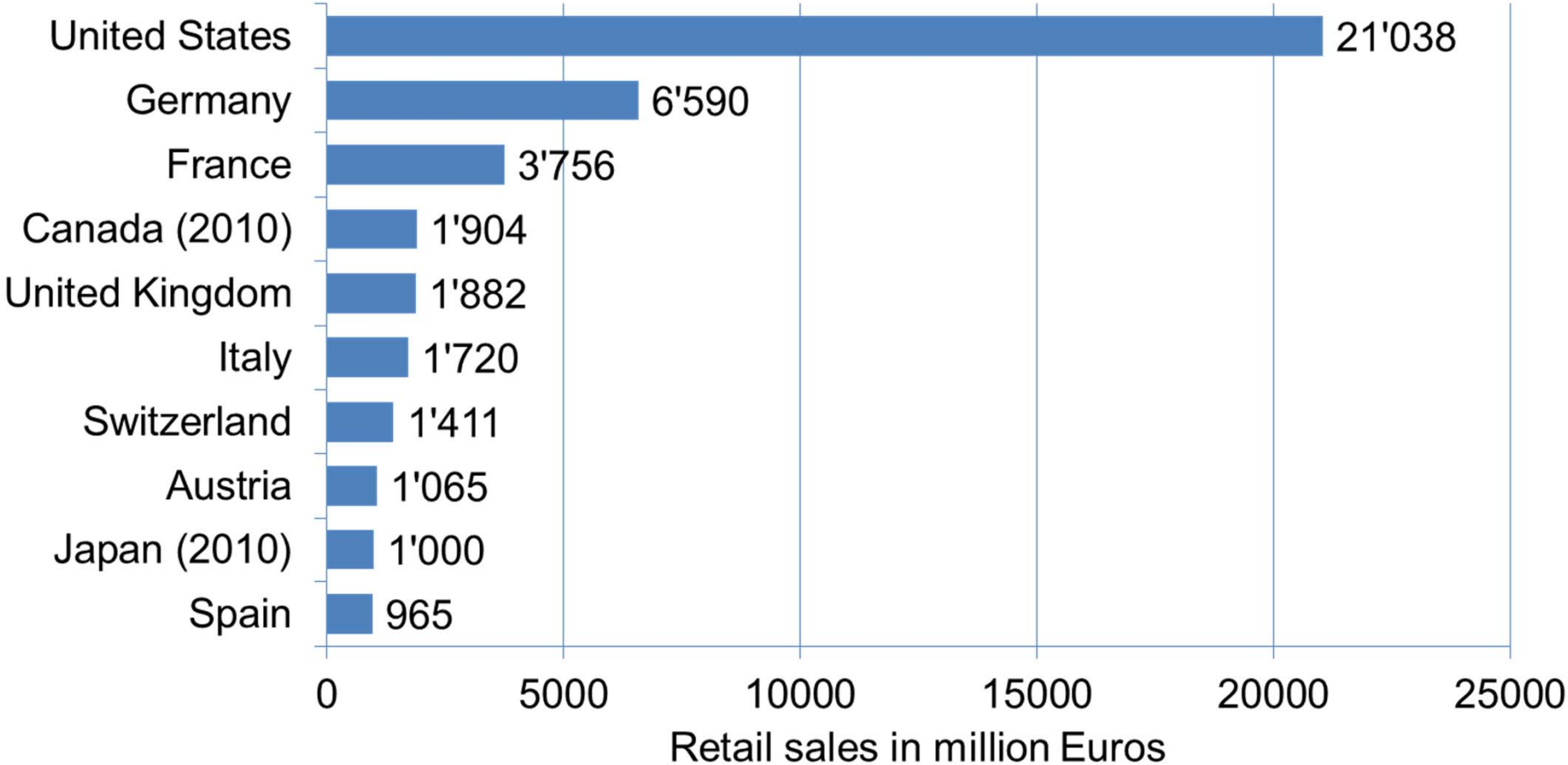
Global organic market: Distribution of revenues by single markets 2011



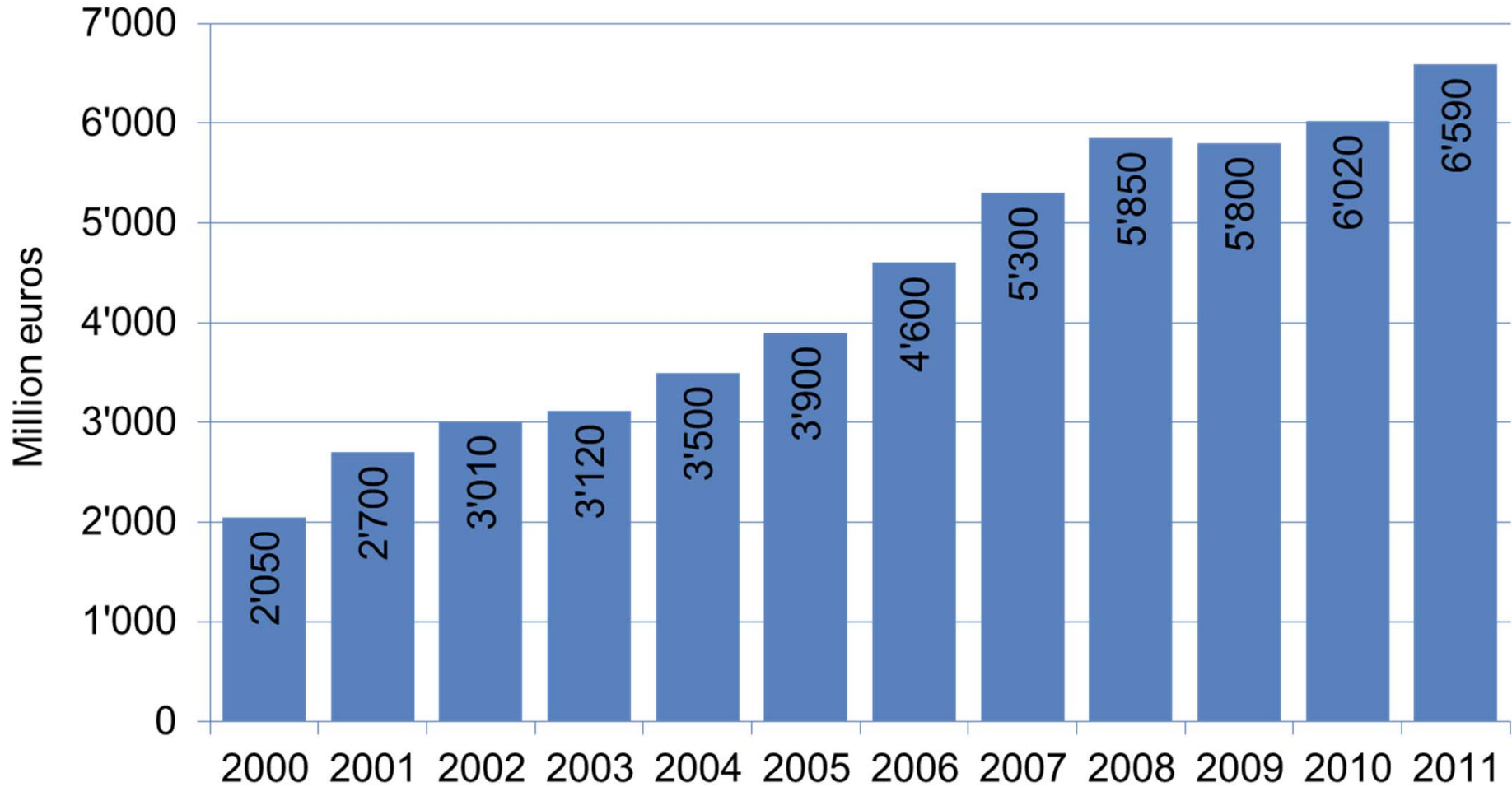
Distribution of organic food sales by country 2011



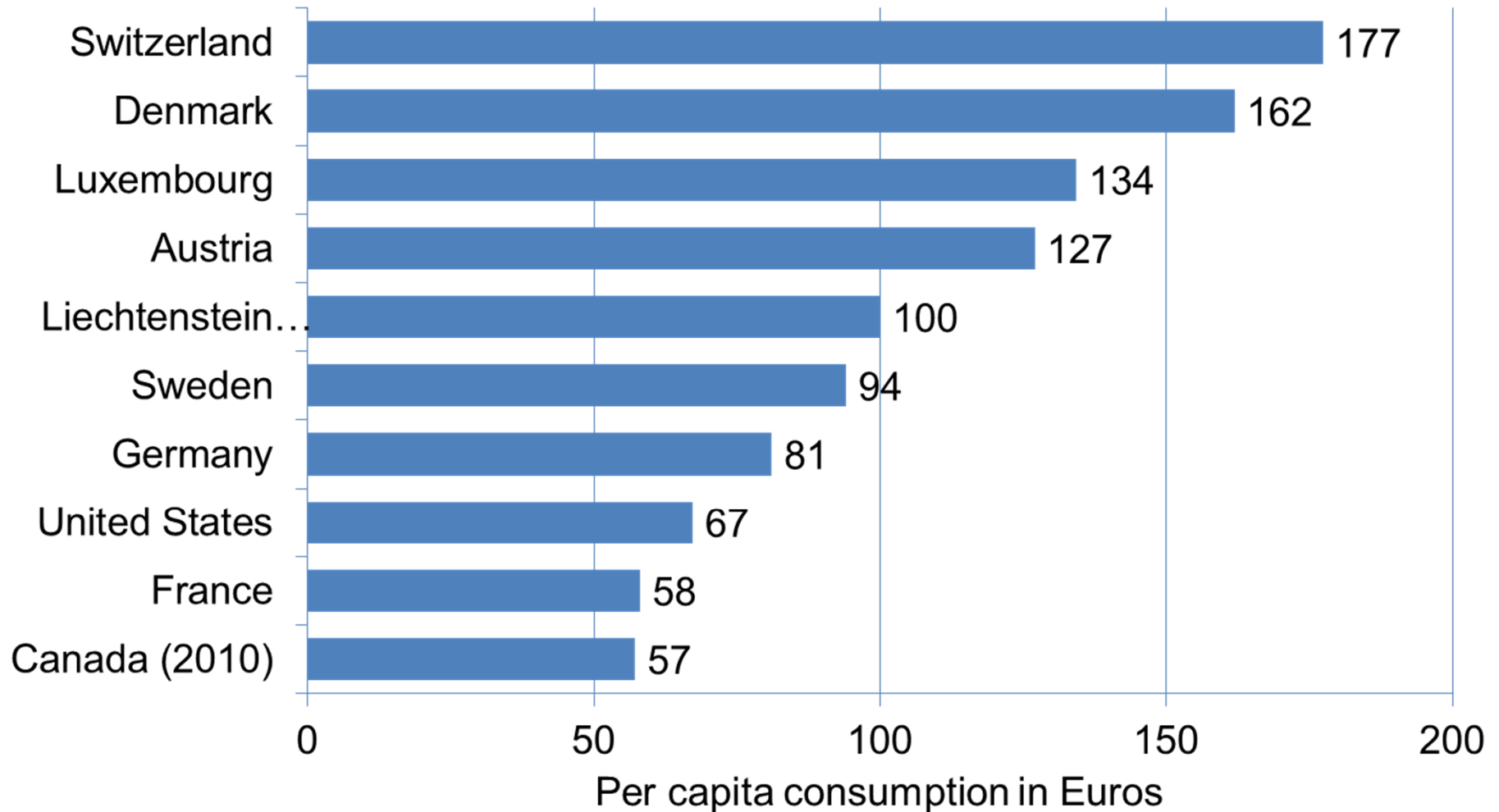
The countries with the largest domestic markets for organic food 2011



Growth of retail sales with organic food and beverages in Germany 2000-2011



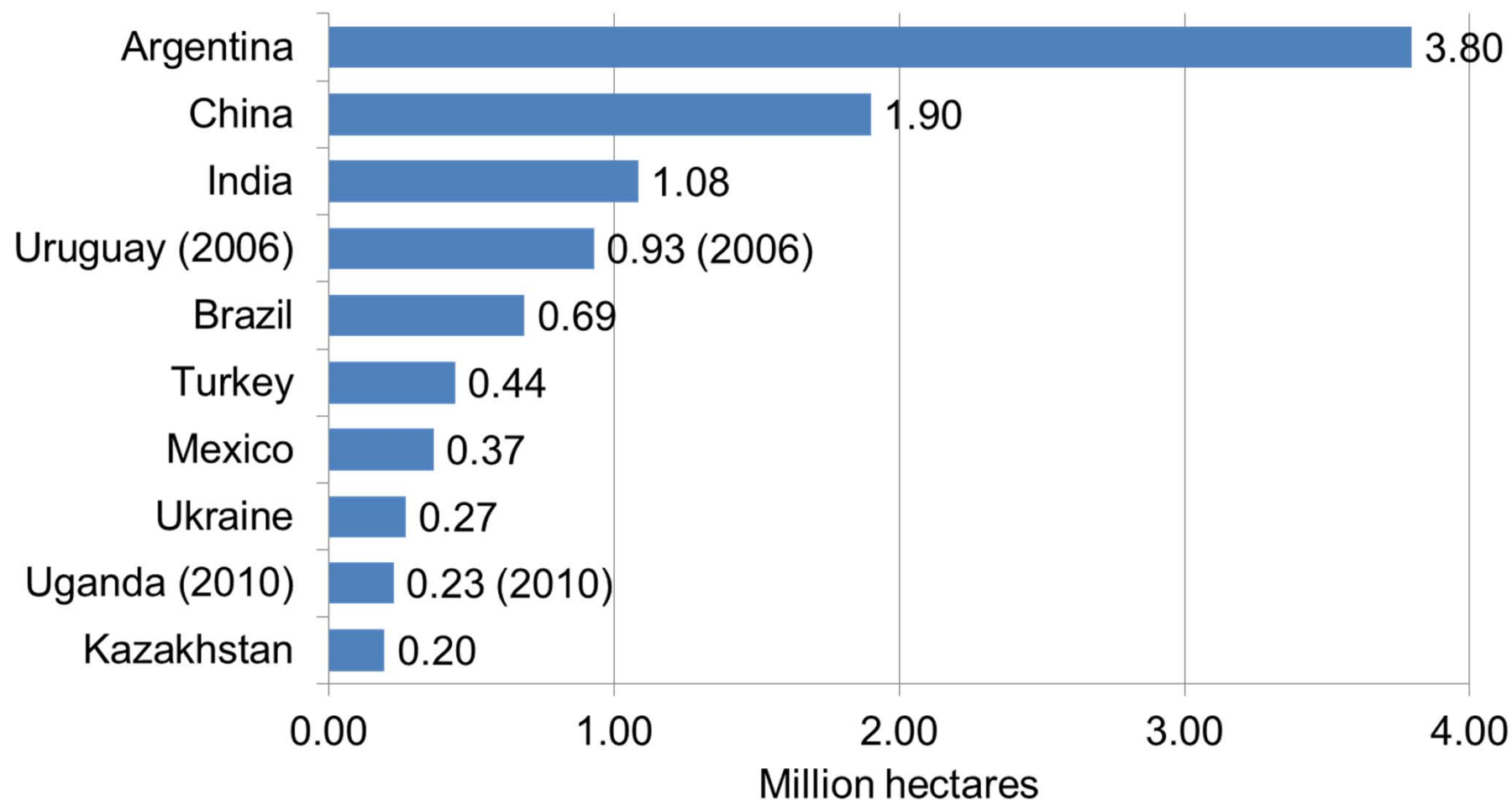
The countries with the highest per capita consumption 2011



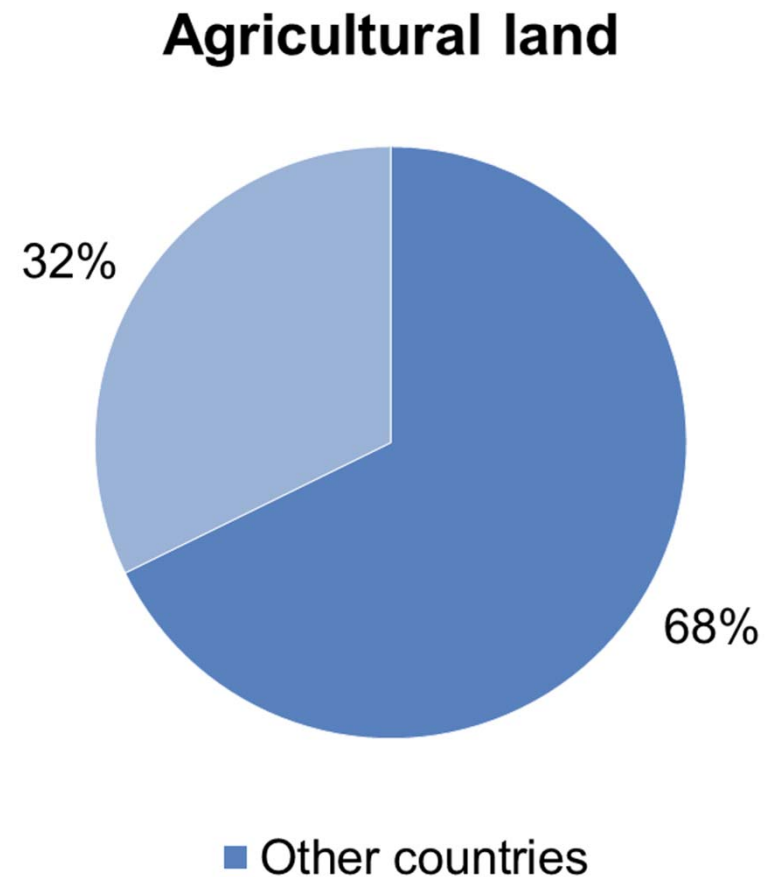
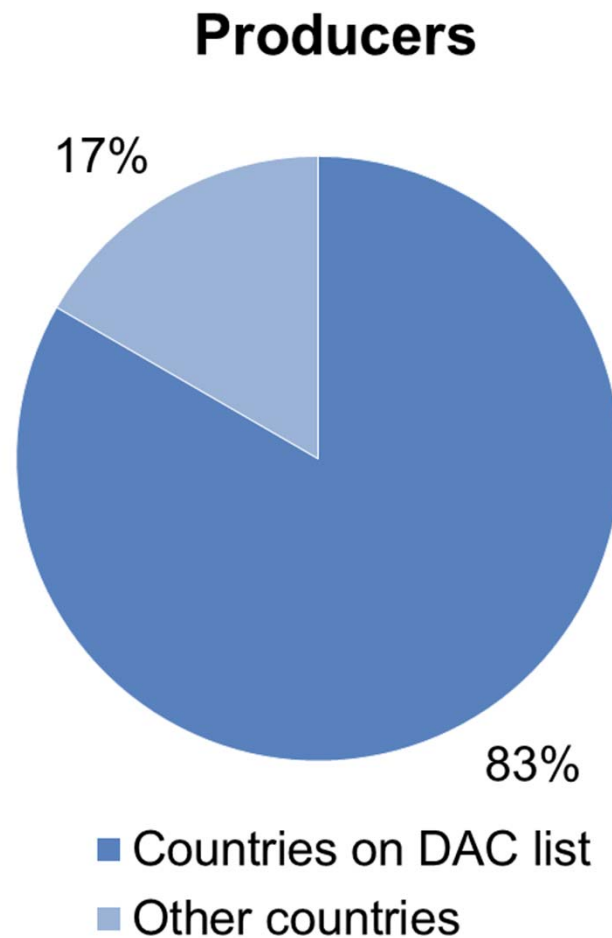
Organic farming in developing & transition countries 2011

- › About one third of the world's organic agricultural land – 12 million hectares - is located in developing/transition countries and in emerging markets.* Most of this land is in Latin American countries, with Asia and Africa in second and third place.
- › 1.5 million producers are in these countries.
- › *Countries listed in the List of Recipients of Official Development Assistance (ODA) of the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD). The list is available at www.oecd.org/dataoecd/23/34/37954893.pdf.

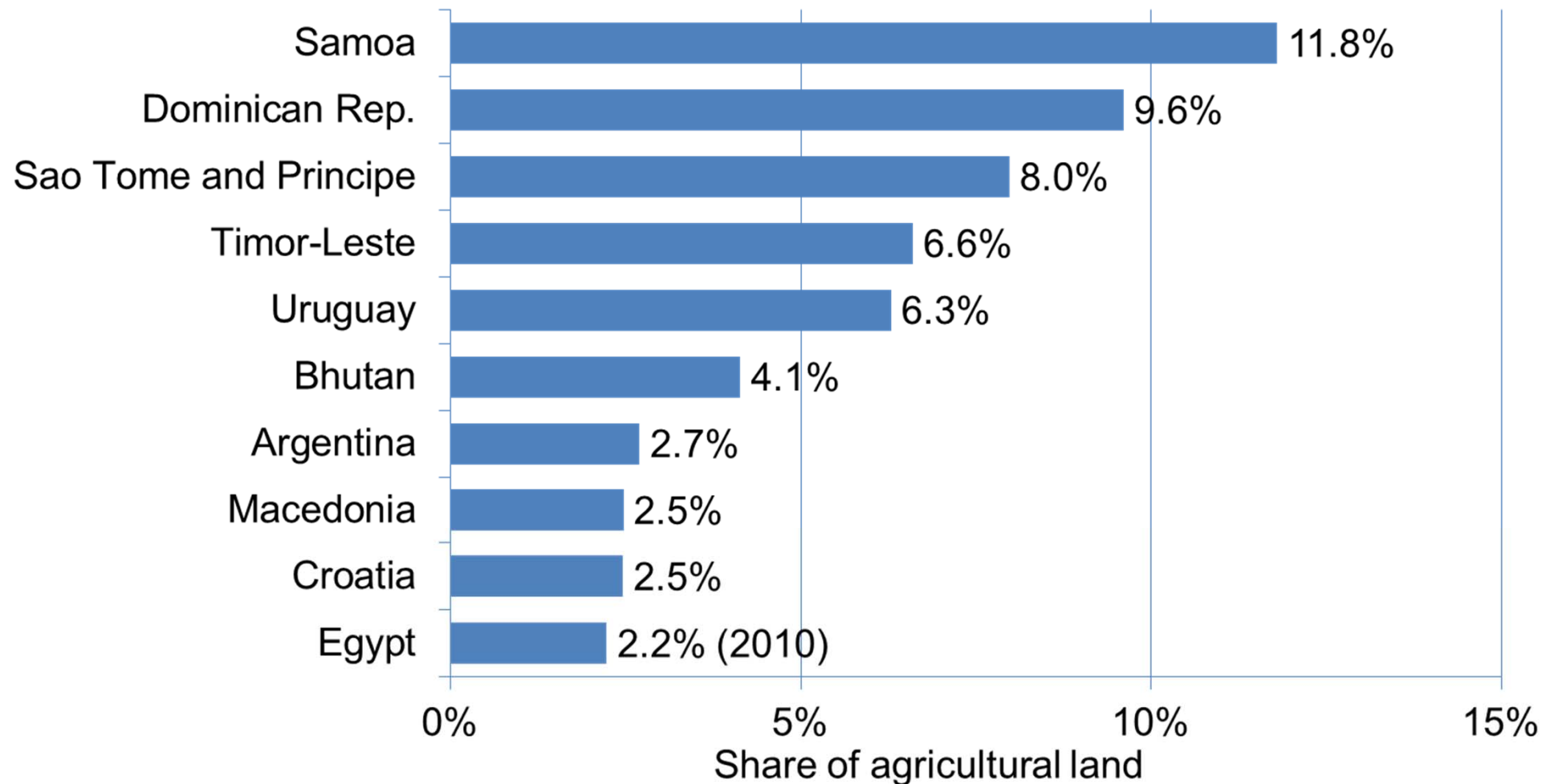
Developing and transition countries: The ten countries with the largest areas of organic agricultural land 2011



Developing and transition countries*: Distribution of organic producers and agricultural land in 2011



Developing and transition countries: The ten countries with the largest highest shares of organic agricultural land 2011



References and data sources

- › FiBL* and IFOAM** (2013): Data on organic agriculture world-wide. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › FiBL*, AMI*** and IFOAM**: Organic market data. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › Sahota, Amarjit (2013): The Global Market for Organic Food and Drink. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › Willer, Helga and Julia Lernoud (2013): Current Statistics on Organic Agriculture Worldwide: Organic Area, Producers and Market. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › For detailed data sources by country please check <http://www.organic-world.net/fileadmin/documents/yearbook/2013/web-fibl-ifoam-2013-320-340.pdf>
- › *FiBL= Research Institute of Organic Agriculture, Switzerland; **IFOAM = International Federation of Organic Agriculture Movements, Germany; ***AMI = Agricultural Information Company, Germany
- › More information at <http://www.organic-world.net/yearbook-2013.html>