Organic Agriculture Worldwide:  
Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2013  
Part 3: Organic agriculture in the regions 2011  

Julia Lernoud and Helga Willer  
Research Institute of Organic Agriculture (FIBL), Frick, Switzerland, February 2013
Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2013: Part 3: Organic agriculture in the regions 2011

› 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


› For updates check www.organic-world.net

› This presentation is available online at: http://www.organic-world.net/yearbook-2013-presentations.html

› Texts and graphs: Julia Lernoud and Helga Willer; Research Institute of Organic Agriculture, FiBL, Frick, Switzerland

› Contact: Helga Willer, Research Institute of Organic Agriculture, FiBL, Frick, Switzerland, helga.willer@fibl.org

› © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2013
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, Saudi 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.

Website www.organic-world.net

› Detailed statistics in excel format (in progress)
› Graphs & Maps
› Data revisions
› News and background information
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.
Africa: Organic agricultural land by country 2011

Source: FiBL-IFOAM Survey 2013
Organic agriculture in Africa 2011

› In Africa, there were 1.1 million hectares of certified organic agricultural land (data 2011).
› This constitutes about three percent of the world’s organic agricultural land.
› Almost 550’000 producers were reported.
› The countries with the most organic land are Uganda (228’419 hectares), Tunisia (178’521 hectares), and Ethiopia (140’475 hectares).
› The highest shares of organic land are in Sao Tome and Prince (8 percent), Egypt (2.2 percent), and Tunisia (1.9 percent).
› The majority of certified organic produce in Africa is destined for export markets.
› The European Union, as the major recipient of these exports, is Africa’s largest market for agricultural produce.

Source: FiBL-IFOAM Survey 2013
Africa: Development of organic agricultural land 2000-2011

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<th>Year</th>
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<tr>
<td>2011</td>
<td>1.07</td>
</tr>
</tbody>
</table>

Source: IFOAM, FiBL and SOEL, surveys 2000-2013
Africa: The ten countries with the most organic agricultural land 2011

- Uganda: 228'419 (2010)
- Tunisia: 178'521
- Ethiopia: 140'475
- Tanzania: 115'022
- Egypt: 82'167 (2010)
- Sudan: 53'017
- South Africa: 41'947
- Democratic Republic of the Congo: 41'032
- Madagascar: 30'243
- Côte d'Ivoire: 20'658

FiBL-IFOAM survey 2013, based on data from governments, the private organic sector and certifiers
Africa: Distribution of organically managed agricultural land by country 2011 (total: 1.07 mio ha)

- Uganda: 21% (228'419 ha)
- Tunisia: 49% (526'241 ha)
- Ethiopia: 17% (178'521 ha)
- Rest: 13% (140'475 ha)

FiBL-IFOAM survey 2013
Africa: The ten countries with the highest shares of organic agricultural land 2011

- Sao Tome and Principe: 8.0%
- Egypt: 2.2% (2010)
- Tunisia: 1.8%
- Comoros: 1.7%
- Uganda: 1.6% (2010)
- Réunion (France): 1.4%
- Ethiopia: 0.4%
- Tanzania: 0.3%
- Rwanda: 0.2%
- Democratic Republic of the Congo: 0.2%

FiBL-IFOAM Survey 2013, based on data from governments, the private organic sector and certifiers
Africa: Distribution of shares of organic land 2011

- 1 country with 5 to 10% organic land
- 5 countries with 1 to 5% organic land
- 29 countries with less than 1% organic land
Africa: Use of organic agricultural land 2011 (total: 1.07 million hectares)

- Arable crops: 14%
- Permanent crops: 38%
- Other agr. Land: 2%
- Perm. Grassland: 6%
- No details: 40%

Key arable crops:
- Oilseeds: 62.25
- Textile crops: 39.87
- Medicinal and…: 26.09
- Vegetables: 8.39
- Cereals: 4.68

Key permanent crops:
- Coffee: 150.39
- Olives: 114.00
- Nuts: 27.81
- Cocoa: 23.58
- Fruit, tropical…: 21.73

FiBL-IFOAM survey 2013
Articles about Africa in the 2013 edition of "The World of Organic Agriculture"

› Organic Farming in Africa: Latest Developments
  Hervé Bouagnimbeck
Asia: Organic agricultural land by country 2011

Source: FiBL-IFOAM Survey 2013, based on national sources and data from certifiers.
Organic Agriculture in Asia – Key Figures 2011

› The total organic agricultural area in Asia was 3.7 million hectares in 2011.

› This constitutes ten percent of the world’s organic agricultural land.

› There were 0.6 million producers reported.

› The leading countries by organic agricultural land are China (1.9 million hectares) and India (1 million hectares).

› Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent).
Asia: Development of organic agricultural land 2000-2011

Source: FiBL-IFOAM-SÖL surveys 2000-2013
Asia: Distribution of organic agricultural land by country 2011 (total 3.7 million hectares)

- 51% (1'900'000) in China
- 29% (1'084'266) in India
- 14% (525'798) in Kazakhstan
- 6% (196'215) in Rest

FiBL-IFOAM survey 2013
Asia: The ten countries with the most organic agricultural land 2011

- China: 1,900,000 hectares
- India: 1,084,266 hectares
- Kazakhstan: 196,215 hectares
- Philippines: 96,317 hectares
- Indonesia: 74,034 hectares
- Iran (Islamic Republic of): 43,332 hectares
- Thailand: 34,829 hectares
- Pakistan: 24,924 hectares
- Timor-Leste: 24,754 hectares
- Vietnam: 23,400 hectares
Asia: Distribution of shares of organic land 2011

- 31 countries; 86%
- 2 countries; 6%
- 3 countries; 8%

Countries with 5 to 10% organic land
Countries with 1 to 5% organic land
Countries with less than 1% organic land
Asia: The ten countries/territories with the highest shares of organic agricultural land 2011

- Timor-Leste: 6.6%
- Bhutan: 4.1%
- Occupied Palestinian Territory: 1.7%
- Israel: 1.4%
- Republic of Korea: 1.0%
- Philippines: 0.8%
- Sri Lanka: 0.7%
- India: 0.6%
- Taiwan: 0.6%
- Lebanon: 0.5%

FiBL Survey 2013, based on national data sources and data from certifiers
Asia: Use of organic agricultural land 2011 (total: 3.7 million hectares)

Source: FiBL-IFOAM survey 2013
Articles about Asia in the 2013 Edition of "The World of Organic Agriculture"

› Developments in Asia
  Ong Kung Wai

› Organic Agriculture in Saudi Arabia
  Marco Hartmann, Saad Khalil, Thomas Bernet, Felix Ruhland, Ayman Al Ghamdi
Europe: Organic agricultural land by country 2011

Source: FiBL Survey 2013
Organic agriculture in Europe: Key data/indicators 2011

› 10.6 million hectares of agricultural land are organic (including in conversion areas).
› This constitutes 2.2 percent of the agricultural land in Europe.
› The organic agricultural land increased by 0.6 million hectares or six percent in 2011.
› Almost 290’000 producers were reported.

Source: FiBL Survey 2013
Organic agriculture in the European Union: Key data/indicators 2011

› 9.5 million hectares of agricultural land are organic (including in conversion areas).
› This constitutes 5.4 percent of the agricultural land in the European Union.
› The organic agricultural land increased by 0.5 million hectares or six percent in 2011.
› Almost 240’000 producers were reported.

Source: FiBL Survey 2013
Organic market in Europe: Key data/indicators 2011

› The market was 21.5 billion euros; nine percent more than in 2010.

› The largest market for organic products in 2011 was Germany with a turnover of 6.6 billion euros, followed by France (3’756 million euros) and the UK (1’882 million euros).

› As a portion of the total market share, the highest levels have been reached in Denmark, Austria and Switzerland, with five percent or more for organic products. The highest per capita spending is also in these countries and in Luxembourg.

Source: FiBL Survey 2013
Europe: The ten countries with the most organic agricultural land 2011

Spain: 1,621,898 hectares
Italy: 1,096,889 hectares
Germany: 1,015,626 hectares
France: 975,141 hectares
United Kingdom: 638,528 hectares
Poland: 609,412 hectares
Austria: 542,553 hectares
Sweden: 480,185 hectares
Czech Republic: 460,498 hectares
Turkey: 442,582 hectares

Source: FiBL Survey 2013, based on national data sources and Eurostat
Europe: Distribution of organically managed agricultural land by country 2011 (Total: 10.6 million hectares)

Source: FiBL Survey 2013, based on national data sources and Eurostat
Europe: Distribution of shares of organic land 2011

- 12 countries; 27%
- 11 countries; 24%
- 15 countries; 33%
- 7 countries; 16%

- Countries with more than 10% organic land
- Countries with 5 to 10% organic land
- Countries with 1 to 5% organic land
- Countries with less than 1%

Source: FiBL Survey 2013, based on national data sources and Eurostat
Europe: The ten countries with the highest shares of organic agricultural land 2011

- Liechtenstein: 29.3%
- Austria: 19.7%
- Sweden: 15.4%
- Estonia: 14.8%
- Switzerland: 11.7%
- Czech Republic: 10.8%
- Latvia: 10.4%
- Slovakia: 8.6%
- Italy: 8.6%
- Faroe Islands: 8.4%

Source: FiBL Survey 2013, based on national data sources and Eurostat
Development of the organic agricultural land in Europe 1985-2011

Source: Lampkin, Nic, 1985-1999; FiBL 2000-2011, based on national data sources and Eurostat
Europe: Use of organic agricultural land 2011 (total: 10.6 million hectares)

- Arable crops: 41%
- Permanent crops: 10%
- Perm. Grassland: 45%
- Other agricultural land: 3%
- No details: 1%

Key arable crops (ha):
- Cereals: 1'787.6
- Green fodder: 1'785.9
- Protein crops: 234.5
- Oilseeds: 185.5
- Vegetables: 116.9

Key permanent crops:
- Olives: 421.90
- Grapes: 231.56
- Nuts: 187.68
- Fruit, temperate: 113.68
- Citrus fruit: 30.64

Source: FiBL Survey 2013, based on national data sources and Eurostat
Distribution of organic retail sales by country worldwide 2011

- United States of America: 44%
- Germany: 14%
- France: 8%
- Canada: 4%
- United Kingdom: 4%
- Italy: 3%
- Switzerland: 3%
- Others: 20%

Source: FiBL-AMI survey 2013, based on national data sources

Source: FiBL-AMI survey 2013, based on national data sources
Dotted lines: Due to fluctuating exchange rates a direct year-to-year comparison is not necessarily possible.
Europe: Distribution of sales of organic food and drink by country 2011 (total: 21.5 billion euros)

Last update: February 10, 2013

Germany 31%
France 17%
United Kingdom 9%
Italy 8%
Switzerland 7%
Austria 5%
Others 23%

Source: OrganicDataNetwork Survey 2013, based on national data sources
The European market for organic food and drink: The countries with the highest sales 2011

- Germany: 6'590 Million euros
- France: 3'756 Million euros
- United Kingdom: 1'882 Million euros
- Italy: 1'720 Million euros
- Switzerland: 1'411 Million euros
- Austria: 1'065 Million euros
- Spain: 965 Million euros
- Denmark: 901 Million euros
- Sweden: 885 Million euros
- Netherlands: 761 Million euros

Source: OrganicDataNetwork Survey 2013, based on national data sources
The European market for organic food: The countries with the highest per capita consumption 2011

Last update: February 10, 2013

Source: OrganicDataNetwork Survey 2013, based on national data sources
Articles about Europe in the 2013 Edition of "The World of Organic Agriculture"

› Organic Agriculture in Europe: Overview
   Helga Willer

› The Organic Market in Europe 2011
   Diana Schaack, Julia Lernoud, Helga Willer, and Susanne Padel

› Improving European Organic Market Information -The OrganicDataNetwork Project
   Raffaele Zanoli

› Survey of the Demands of End Users in Europe for Organic Market Data
   Robert Home, Matthias Stolze, and Michal Losták

› Organic Agriculture in Albania
   Thomas Bernet and Iris S. Kazazi

› Organic Agriculture in Hungary
   Zoltan Dezsény and Dóra Drexler

› Organic Agriculture in Kosovo
   Sylë Sylvanaj

› Montenegro - Country Report
   Natasa Mirecki

› Organic Farming in Serbia
   Guido Haas
Latin America/Caribbean: Organic agricultural land by country 2011

Source: FiBL-IFOAM Survey 2013
Latin America: Key figures 2011

› In Latin America, more than 300’000 producers managed 6.9 million hectares of agricultural land organically in 2011.

› This constitutes 18 percent of the world’s organic land and 1.1 percent of the region’s agricultural land.

› The leading countries are Argentina (3.8 million hectares), Uruguay (0.93 million hectares), and Brazil (0.69 million hectares).

› The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.9 percent), French Guiana (17.5 percent), and the Dominican Republic (9.6 percent).

Source: FiBL-IFOAM Survey 2013
Most organic products from Latin American countries are sold on the European, North American or Japanese markets. Popular goods are especially those that cannot be produced in these regions, as well as off-season products.

Thus, the development of robust local markets is still a major challenge, without which the sustainability of organic production cannot be achieved. Important crops are tropical fruits, grains and cereals, coffee, cocoa, sugar, and meats. Most organic food sales in the domestic markets of the countries occur in major cities.

Twenty-two countries have legislation on organic farming, and two 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.
Latin America/Caribbean: Distribution of organic agricultural land by country 2011 (total: 6.9 million hectares)

- **Argentina**: 21% (1,443,470 hectares)
- **Uruguay (2006)**: 10% (687,040 hectares)
- **Brazil**: 14% (930,965 hectares)
- **Rest**: 55% (3,796,136 hectares)

Source: FiBL-IFOAM Survey 2013
Latin America/Caribbean: The ten countries with the most organic agricultural land 2011

Argentina: 3'796'136
Brazil: 687'040
Falkland Islands (Malvinas): 398'806
Mexico: 366'904
Peru: 187'047
Dominican Republic: 186'931
Ecuador: 52'196
Paraguay: 51'190 (2007)
Colombia: 34'060

Argentina and Uruguay: Only fully converted area

Source: FiBL-IFOAM Survey 2013
Latin America: Distribution of shares of organic land 2011

- 72% of countries (21 countries) with less than 1% organic land
- 14% of countries (4 countries) with 1 to 4.9% organic land
- 7% of countries (2 countries) with 5 to 9.9% organic land
- 7% of countries (2 countries) with more than 10% organic land

Source: FiBL-IFOAM Survey 2013
Latin America: The ten countries with the highest shares of organic agricultural land 2011

- Falkland Islands (Malvinas): 35.9%
- French Guiana (France): 17.5%
- Dominican Republic: 9.6%
- Uruguay: 6.3% (2006)
- Argentina: 2.7%
- Mexico: 1.7%
- Martinique (France): 1.1%
- Dominica: 1.0%
- Peru: 0.9%
- Belize: 0.8%

Source: FiBL-IFOAM Survey 2013
Latin America: Development of organically managed agricultural land 2000-2011

In millions of hectares

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<tr>
<th>Year</th>
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Source: FiBL-IFOAM-SOEL Surveys 1999-2013
Latin America: Use of organic agricultural land 2011 (total: 6.9 million hectares)

No details 16%
Arable crops 3%
Permanent crops 11%
Perm. Grassland 70%

Key arable crops [ha]
- Sugarcane: 41.00
- Vegetables: 40.25
- Cereals: 39.36
- Oilseeds: 39.30
- Industrial crops: 11.59

Key permanent crops
- Coffee: 376.81
- Cocoa: 196.42
- Fruit, tropical and…: 113.83
- Coconut: 14.01
- Citrus fruit: 8.45

Source: FiBL-IFOAM Survey 2013
Articles about Latin America and the Caribbean in the 2013 Edition of "The World of Organic Agriculture"

› Organic Agriculture in Latin America and the Caribbean
   Patricia Flores Escudero
North America: Organic agricultural land by country 2011

Source: USDA and COG 2013
Organic Agriculture in North America: Key figures 2011

› In North America, almost 2.8 million hectares are managed organically, of these nearly two million in the United States and 0.8 million in Canada.

› This represents 0.7 percent of the total agricultural area in the region and more than 7 percent of the world’s organic agricultural land.

› In the US, 29.22 billion US dollars were spent on organic food, which constituted 4.2 percent of the food market. A further 2.2 billion US dollars were sales of organic non-foods (2011). In Canada, organic food sales were 2.6 billion Canadian dollars (2010).

› Projections for 2012 and beyond indicate higher growth rates for organic sales in North America.
North America: Organic agricultural land 2011

United States of America (2008)

Canada

Hectares

Source: USDA 2009 and Canadian Organic Growers 2011
North America: Distribution of organic agricultural land by country 2011 (Total: 2.8 million hectares)

- 70% (1,948,946 hectares) United States (2009)
- 30% (841,216 hectares) Canada

Source: USDA 2009 and Canadian Organic Growers 2011
North America: Shares of organic agricultural land 2011

- Canada: 1.2%
- United States of America (2008): 0.6%

Source: Canadian Organic Growers 2011 and USDA 2009

Source: USDA and Canadian Organic Growers 1999-2011

For the US, no new data have been available since 2008.
North America: Use of organic agricultural land 2011* (total: 2.8 million hectares)

Source: FiBL-IFOAM Survey 2013

*US data from 2008
Development of the US Organic market

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Source: OTA Organic Industry Surveys 2002-2013. © OTA
Articles about North America in the 2013 Edition of "The World of Organic Agriculture"

› United States of America
  Barbara Fitch Haumann

› Canada
  Matthew Holmes and Anne Macey

› All in Willer/Lernoud/Kilcher (Eds.) 2013: The World of Organic Agriculture. Statistics and Emerging Trends 2013. IFOAM and FiBL, Bonn and Frick
Oceania: Organic agricultural land by country 2011
Organic agriculture in Oceania: Key figures 2011

- This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu.
- Altogether, there are 13‘763 producers, managing 12.2 million hectares.
- This constitutes 2.9 percent of the agricultural land in the area and almost 33 percent of the world’s organic land.
- Ninety-eight percent of the organic land in the region is in Australia (12 million hectares, 97 percent of which is extensive grazing land), followed by New Zealand (133’321 hectares), and Samoa (33’515 hectares).
- The highest shares of all agricultural land are in Samoa (11.8 percent), followed by Australia (2.9 percent), Solomon Islands (1.6 percent), and Niue (1.2 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, also growing. In Australia it was at 1’270 million Australian dollars and in New Zealand at 360 million New Zealand dollars.

The biggest change in the Australian domestic market over 2009 was that the Australian Standard for Organic and Biodynamic Products was adopted and published by Standards Australia.

The year 2010 marked a milestone for the Pacific Region: The International Organic Accreditation Service (www.ioas.org) assessed the Pacific Organic Standard (POS) and found it to be equivalent to the standards requirements of the European Union’s organic regulations.
Oceania: Organic agricultural land 2011

Australia: 12'001'724 (2009)
New Zealand: 133'321
Samoa: 33'515
Papua New Guinea: 11'337
Vanuatu: 2'197
Fiji: 2'006
Solomon Islands: 1'307
Tonga: 248
French Polynesia: 105
Niue: 61
Cook Islands: 22

Source: FiBL-IFOAM Survey 2013, based on national data sources and certifier data
Oceania: Development of organic agricultural land 2000-2011

Million hectares

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FiBL-IFOAM Survey 2013
Oceania: Shares of organic agricultural land 2011

- Samoa: 11.8%
- Australia (2009): 2.9% (2009)
- Solomon Islands: 1.6%
- Niue: 1.2%
- Vanuatu: 1.2%
- New Zealand: 1.2%
- Papua New Guinea: 1.0%
- Tonga: 0.8%
- Cook Islands: 0.7%
- Fiji: 0.5%
- French Polynesia: 0.2%

Source: FiBL-IFOAM Survey 2013, based on national data sources and certifier data.
Oceania: Distribution of shares of organic land 2011

- Countries with 5 to 9.9% organic land
- Countries with 1 to 4.9% organic land
- Countries with less than 1% organic land

Source: FiBL-IFOAM Survey 2013
Oceania: Use of organic agricultural land 2011 (total: 12.2 million hectares)

96% Agricultural land, no details (ha)

4% Permanent grassland (ha)

Source: FiBL-IFOAM Survey 2013
Oceania: Top five countries with the largest growth of organic agricultural land in 2011

Source: FiBL-IFOAM Survey 2013

- **Fiji**: 95.0%
- **Papua New Guinea**: 72.2%
- **Samoa**: 71.0%
- **Cook Islands**: 18.6%
- **New Zealand**: 6.6%
Articles about Oceania in the 2013 Edition of "The World of Organic Agriculture"

› Organic Farming in Australia
   Els Wynen and Alexandra Mitchell

› Organic Agriculture in the Pacific Islands
   Karen Mapusua

› All in Willer/Lernoud/Kilcher (Eds.) 2013: The World of Organic Agriculture. Statistics and Emerging Trends 2013. FiBL and IFOAM, Bonn and Frick
References and data sources


› *FiBL= Research Institute of Organic Agriculture, Switzerland; **IFOAM = International Federation of Organic Agriculture Movements, Germany; ***AMI = Agricultural Information Company, Germany