Welcome!

Global Market overview

FiBL AND IFOAM
THE WORLD OF ORGANIC AGRICULTURE
STATISTICS & EMERGING TRENDS 2013

OCEANIA 3.2 MILLION HA
EUROPE 7.6 MILLION HA
LATIN AMERICA 6.9 MILLION HA
ASIA 1.7 MILLION HA
NORTH AMERICA 2.4 MILLION HA
AFRICA 1.3 MILLION HA

Supported by
Schweizerische Biogarantieanstalt
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Confédération intar
Svensk Confederation
Federal Department of Economic Affairs (EDA)
State Secretariat for Economic Affairs (SECO)
UNITING THE ORGANIC WORLD
International Federation of Organic Agriculture Movements

It unites, leads and assists the organic movement in its full diversity

757 AFFILIATES
115 COUNTRIES

40 YEARS
LEADING, UNITING AND ASSISTING THE WORLDWIDE ORGANIC MOVEMENT.

1.8 mil certified farmers
70 million ha land
63 billion US$ consumer purchases

BE PART OF THE GLOBAL ORGANIC MOVEMENT. APPLY TODAY.
THE DEFINITION OF ORGANIC AGRICULTURE
Organic Agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects. Organic Agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved.

THE PRINCIPLES OF ORGANIC AGRICULTURE
Organic Agriculture is based on the principles of health, ecology, fairness and care.

THE SCOPE OF ORGANIC AGRICULTURE
IFOAM regards any system that is based on the Principles of Organic Agriculture and uses organic methods, as ‘Organic Agriculture’ and any farmer practicing such a system as an ‘organic farmer’. This includes various forms of certified and non-certified Organic Agriculture. Guarantee Systems may be for instance third party certification, including group certification, as well as participatory guarantee systems.

STANDARDS & REGULATIONS: THAT’S ORGANIC WORLDWIDE
The IFOAM Family of Standards draws the line between organic and not organic. It contains all standards and regulations that have passed an equivalence assessment against a normative reference approved by IFOAM’s membership. IFOAM encourages governments and standard users to recognize other standards in the Family as equivalent.

IFOAM POSITIONS
IFOAM has developed positions on a range of topics. These include: Use of Nanotechnologies and Nanomaterials in Organic Agriculture; The use of Organic Seed and Plant Propagation in Organic; The Role of Smallholders in Organic Agriculture; The Full Diversity of Organic Agriculture; The Role of Organic Agriculture in Mitigating Climate Change; Smallholder Group Certification for Organic Production and Processing; Position on Genetic Engineering and Genetically Modified Organisms; Organic Agriculture and Food Security; Organic Agriculture and Biodiversity.
That’s Organic - Worldwide.

GLOBAL
IFOAM Standard
International Standard for Forest Garden Products (FGP)

AFRICA
Tunisia Organic Regulation
East African Organic Products Standard
ECert Organic Standards, Kenya
Basic Norms of Organic Agriculture in Senegal, Senegal
Afriso Standards for Organic Production, South Africa
Siyavuna Organic Standards, South Africa
Organic Standards for Tancert, Tanzania
Uganda Organic Standard, Uganda

ASIA
Saudi Arabia Organic Regulation
China Organic Regulation
Indo Organic Regulation
Israel Organic Regulation

OCEANIA
National Standard for Organic and Bio-Dynamic Produce, Australia
New Zealand Organic Export Regulation
Pacific Organic Standard, Pacific Community
Australian Certified Organic Standard, Australia
NASAA Organic Standard, Australia
AsureQuality Organic Standard, New Zealand
BioGro Organic Standards, New Zealand

EUROPE
EU Organic Regulation
Switzerland Organic Regulation
Turkey Organic Regulation
Bio Suisse Standards, Switzerland
Grüns Goering Standards, Germany
Nature & Progrès Standards, France
Ecoland Standards for Organic Agriculture and Food Production, Germany
Ecocertification Standard, Germany
Spanish Organic Standards, Spain

NORTH AMERICA
Canada Organic Regulation
USA Organic Regulation
DOAM Organic Standards, Dominica
Red Mexican of Tianguis y Mercados Orgánicos’ Standard, Mexico
CCOF Global Market Access Standard, USA
Farm Verified Organic Requirements Manual, USA
NOFA Standards for Organic Land Care, USA
QCS Int. Program Standard Manual, USA

SOUTH AMERICA
Argentina Organic Regulation
Costa Rica Organic Regulation
Argencert Organic Standard, Argentina

Note: Applicant standards are marked in grey.

Click on each standard to see more details.

The Family of Standards contains all standards officially endorsed as organic by the Organic Movement, based on their equivalence with the Common Objectives and Requirements of Organic Standards. Both private standards and government regulations are admissible.

wwwIFOAM.org/ogs
Save the date!
18th IFOAM Organic World Congress, October 13-15 2014

Building Organic Bridges in Istanbul
The size of the countries represent, proportionally, certified organic area with overall 37 million hectares worldwide. The total organic certified land is 80 million hectares.
Top 10 der Länder der Bio-Anbauflächen, der Anzahl der Bio-Produzenten und der Biomärkte

Source/Quelle: FBL-IFOAM survey/Studie 2013
# Organic Agriculture 2013: Key Indicators and Leading Countries

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<tr>
<th>Indicator</th>
<th>World</th>
<th>Leading countries</th>
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<td><strong>Countries with data on certified organic agriculture</strong>&lt;sup&gt;1&lt;/sup&gt;</td>
<td>2011: 162 countries</td>
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Argentina (3.8 mio. hectares)  
US (1.9 mio. hectares, 2008) |
| **Share of total agricultural land** | 2011: 0.86 %<sup>2</sup> | Falkland Islands (Malvinas) (35.9 %)  
Liechtenstein (29.3 %)  
Austria (19.7 %) |
| **Further, non-agricultural organic areas (mainly wild collection)** | 2011: 32.5 million hectares (2010: 43 million hectares; 2009: 41 million hectares) | Finland (7 million hectares)  
Zambia (5.9 million hectares, 2009)  
India (4.5 million hectares) |
| **Producers** | 1.8 million producers (2010: 1.6 million producers; 2009: 1.8 million producers) | India (547’591), Uganda (188’625, 2010), Mexico (169’570) |
Source: Organic Monitor | US (21 billion euros or 29 billion US dollars),  
Germany (6.6 billion euros or 9.2 billion US dollars)  
France (3.7 billion euros or 5.2 billion US dollars) |
| **Per capita consumption** | 2011: 9.02 US dollars<sup>3</sup> | Switzerland (177.4 euros or 250.4 USD),  
Denmark (161.9 euros or 225.7 USD)  
Luxemburg (134.3 euros or 187.3 USD) |
| **Number of countries with organic regulations 2011** | 86 countries (2010: 84 countries) | |
| **Organic certifiers 2010** | 2012: 576 certifiers (2011: 549; 2010 532) | South Korea, Japan, USA |
| **Number of IFOAM affiliates** | 1.1.2013: 766 affiliates from 117 countries | Germany: 96 affiliates; India: 46 affiliates; China: 40 affiliates; United States: 33 affiliates; The Netherlands: 31 affiliates |

Source: FiBL and IFOAM; for total global market: Organic Monitor; for number of certifiers: Organic Standard/Grolink.
The Speakers

- **Matthew Holmes**, OTA, Canada and IFOAM World Board North America markets, 12 minutes
- **Ming Liu**, IPD Organics Brazil, Latin American markets, 12 Minutes
- **Helga Willer**, FiBL, Switzerland European markets, 15 minutes
- **Michael Baker**, Chief Certification Officer ACO, Australia Oceania markets 12 minutes
- **Markus Arbenz**, IFOAM Executive Director, Moderation
Thank you for your attention!
• We want to provide Latest Figures and Trends from the most important markets around the globe: Europe, North America, Australia, Brazil and Japan. Unfortunately I haven't found anybody yet for Japan, but the other markets are well covered with great experts.

• We would like to use the 90 minutes as follows:

1. Opening by me. I will summarize in 1-2 minutes the global market figures and explain, what has been discussed in the session about the statistics and emerging trends. And I will introduce you.

2. We start in the biggest market: North America. Matthew Holmes (Canada) presents for 10 -12 minutes. Interesting features about the North American Market developments with (apart from the latest figures) focus on consumers concerns and hot issues. What kind of discussion are going on and what has to be taken into account in order to be successful in the market in 2013.
   In case you keep your time (or are even shorter, I come back to Matthew with 1 -2 spontaneous questions.

3. We stay in America and repeat what we did for North America. Ming Liu will present for Latin American markets (not production and export, but sales to consumers) with a special focus on Brazil. Again 10 - 12 minutes and focus on consumers concerns and hot issues. It all be interesting to see the differences to North America. And again I will interview with 1-2 spontaneous questions if time allows.

4. The same procedure for Europe. We don't go in all the European markets (there is a special session for that), but have Europe as whole in the focus. Helga Willer may take 15 minutes, since Europe is rather complex.

5. Last but not least we go to Australia and we do the same there. Michael Baker will present 10-12 minutes and I will ask questions.

I will make a last attempt to find an Asian (preferably Japan) speaker. If I don't find we will simply skip that part.

After all that we would like to answer to questions from the audience and try to make a synergy out of the contributions in a short panel discussion. And I want to make sure you get the opportunity for a final statement in the panel.