Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2015
Part 1: Global data and survey background

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Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2015: Part 1: Global data and survey background

› Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, in cooperation with the International Federation of Organic Agriculture Movements IFOAM – Organics International, based on national data sources and data from certifiers.


› For updates check www.organic-world.net

› This presentation is available online at: http://www.organic-world.net/yearbook/yearbook2015/slide-presentations.html

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› European market data:
  Co-funding from the European Union for the European data survey in the framework of the OrganicData network project

› 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2015

* See also disclaimer on last page of this slide show
The 16th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2015.*

Contents:

- Results of the survey on organic agriculture worldwide;
- Organic agriculture in the regions and country reports;
- Australia, Canada, the Pacific Islands, Mediterranean region, and The United States of America.
- Chapters on the global market, standards & legislations, voluntary standards, PGS, European market and vegetables production in China
- Numerous tables and graphs.
- The book can be ordered via IFOAM.bio and shop.FiBL.org.

Website www.organic-world.net

› Detailed statistics in excel format
› Graphs & Maps
› Data revisions
› News and background information
About this presentation

› There are 3 presentations summarizing the key results of the FiBL-IFOAM survey on organic agriculture worldwide 2015 (data 2013). Apart from the global data, key results on crop and on regional data are presented.

› More information is available at www.organic-world.net

› The following three presentations are available at http://www.organic-world.net/yearbook/yearbook2015/slide-presentations.html:

  › Part 1: Global data 2013 and survey background
  › Part 2: Land use and key crops in organic agriculture 2013
  › Part 3: Organic agriculture in the regions 2013
The 16th Survey on organic agriculture worldwide

› The 16th 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 – Organics International) and further partners.

› The survey was carried out between July 2014 and February 2015.

› Data were received from 170 countries.

› New countries included: Andorra, Bahamas, Iraq, Mayotte.

› Updated data on area and producers were available for 129 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 2015” and at www.organic-world.net.
Countries covered by the survey on organic agriculture 2013

Table 1: Countries and areas covered by the global survey on organic agriculture 2013

<table>
<thead>
<tr>
<th>Region</th>
<th>Countries* with data on organic agriculture</th>
<th>Countries per region$^1$</th>
<th>Share of countries that provided data (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>39</td>
<td>56</td>
<td>70%</td>
</tr>
<tr>
<td>Asia</td>
<td>39</td>
<td>47</td>
<td>83%</td>
</tr>
<tr>
<td>Europe</td>
<td>47</td>
<td>47</td>
<td>100%</td>
</tr>
<tr>
<td>Latin America and Caribbean</td>
<td>30</td>
<td>46</td>
<td>65%</td>
</tr>
<tr>
<td>North America</td>
<td>3</td>
<td>5</td>
<td>60%</td>
</tr>
<tr>
<td>Oceania</td>
<td>12</td>
<td>26</td>
<td>46%</td>
</tr>
<tr>
<td>World</td>
<td>170</td>
<td>227</td>
<td>75%</td>
</tr>
</tbody>
</table>

Source: FiBL-IFOAM survey 2015

*Where the designation "country" appears in this book, it covers countries or areas.$^2$
Organic data collection systems world-wide for data on area, operators and production (total 170 countries)

- Government collection systems
  - Data from the certifiers
  - Census/farm structure survey
  - Direct payments
- Private collection systems
  - Data from the certifiers
  - Company data
- No collection system
  - FiBL and IFOAM collect the data from the international certifiers

Source: FiBL & IFOAM 2015
International certifiers that provided data for several countries
Networks, transnational data collection efforts
General notes on the data


› 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.

Key data/indicators on organic agriculture world-wide 2013

› 170 countries have data on organic agriculture.
› 43.1 million hectares of agricultural land are organic (including conversion areas).
› 11 countries have more than ten percent organic agricultural land, and 15 countries have between 5 and 10 percent organic agricultural land.
› There are more than 35 million hectares of further non agricultural areas.
› 2 million producers were reported.
Distribution of organic areas

Distribution of all organic areas in 2013
Source: FiBL-IFOAM Survey 2015

- Agricultural land (43.1 million hectares in 2013)
  - 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 (35.1 million hectares in 2013)
  - Wild collection/Bee keeping (34.1 million hectares)
  - Forest
  - Aquaculture
  - Grazing areas on non-agricultural land

Source: FiBL & IFOAM 2015
Organic agricultural land by region 2013

- Currently 43.1 million hectares are under organic agricultural management (end of 2013 for most data).
- The distribution of the organic agricultural land is as follows:
  - Oceania (17.3 million hectares);
  - Europe (11.5 million hectares);
  - Latin America (6.6 million hectares),
  - Asia (3.4 million hectares),
  - North America (3.0 million hectares), and
  - Africa (1.2 million hectares).
- Oceania has 40 percent of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, almost 30 percent of the world’s organic agricultural land. Latin America is has 15 percent of the world’s organic land.
- In addition to the agricultural land, there are 35 million hectares of non-agricultural areas, mainly wild-collection.

Source: FiBL & IFOAM 2015
Organic agricultural land and other organic areas 2013

Source: FiBL-IFOAM survey 2015
Organic agricultural land by region 2013

Distribution of organic agricultural land by region 2013
Source: FiBL-IFOAM Survey 2015

- Oceania: 40%
- Europe: 27%
- Latin America: 15%
- Asia: 8%
- North America: 7%
- Africa: 3%
- Asia: 8%
- North America: 7%
- Latin America: 15%
- Europe: 27%
- Oceania: 40%
The countries with the most organic agricultural land 2013

› 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 30.5 million hectares, constituting more than seventy percent of the world’s organic agricultural land.

Source: FiBL & IFOAM 2015
The ten countries with the largest areas of organic agricultural land 2013

Source: FiBL-IFOAM survey 2015

Australia: 17.2
Argentina: 3.2
US (2011): 2.2
China: 2.1
Spain: 1.6
Italy: 1.3
France: 1.1
Germany: 1.1
Uruguay (2006): 0.9
Canada: 0.9
Share of organic land of total agricultural area 2013

› The share of the world’s organic agricultural of all agricultural land is 0.98 percent.

› By region, the share is highest in Oceania (4.1 percent), followed by Europe with 2.4 percent and Latin America with 1.1 percent.

› In the 27 countries of the European Union, the share of organically managed land is 5.7 percent. In the other regions, the share of organically managed land is less than one percent.

› Eleven countries have more than 10 percent organic land and 15 countries have between 5 and 10 percent organic land.

› However, almost 60 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 (31 percent) and Austria (19.5 percent).

› It is interesting to note that many island states have high shares.

Source: FiBL & IFOAM 2015
## Shares of organic agricultural land by region 2013

<table>
<thead>
<tr>
<th>Region</th>
<th>Organic agr. land [ha]</th>
<th>Share of total agri. land*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>1'222'374</td>
<td>0.1%</td>
</tr>
<tr>
<td>Asia</td>
<td>3'425'939</td>
<td>0.2%</td>
</tr>
<tr>
<td>Europe</td>
<td>11'460'773</td>
<td>2.4%</td>
</tr>
<tr>
<td>Latin America</td>
<td>6'611'636</td>
<td>1.1%</td>
</tr>
<tr>
<td>North America</td>
<td>3'047'710</td>
<td>0.7%</td>
</tr>
<tr>
<td>Oceania</td>
<td>17'321'733</td>
<td>4.1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>43'085'219</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

Source: FiBL-IFOAM survey 2015.
*For the calculation of the shares of total agricultural land, only the countries included in the survey were used.
**Total includes correction value for French overseas departments.

(European Union: 5.7 %)
The highest shares of organic agr. land 2013

Countries with more than 10 percent of organic agricultural land 2013

Source: FiBL-IFOAM survey 2015

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total agricultural land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Falkland Islands (Malvinas)</td>
<td>36.3%</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>31.0%</td>
</tr>
<tr>
<td>Austria</td>
<td>19.5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>16.3%</td>
</tr>
<tr>
<td>Estonia</td>
<td>16.0%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>12.2%</td>
</tr>
<tr>
<td>French Guiana (France)</td>
<td>11.9%</td>
</tr>
<tr>
<td>Samoa (2012)</td>
<td>11.8%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>11.2%</td>
</tr>
<tr>
<td>Latvia</td>
<td>11.0%</td>
</tr>
<tr>
<td>Italy</td>
<td>10.3%</td>
</tr>
</tbody>
</table>
Distribution of organic shares 2013

Distribution of the shares of organic agricultural land 2013

Source: FiBL-IFOAM Survey 2015

- More than 10%: 11 countries; 7%
- Between 5-1%: 15 countries; 9%
- Between 10-5%: 40 countries; 25%
- Less than 1%: 97 countries; 59%

www.fibl.org
Growth of the organic agricultural land 2013

- Compared with the revised data from 2012, the organic agricultural land has increased by 15 percent in 2013, almost 6 million hectares. This increase is due to the fact that in Australia, a 53 percent growth in fully certified organic land area occurred between 2011 and 2014, due to rangeland areas coming into organic production to meet the strong demand for organic beef (Australian Organic 2014).

- Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has almost quadrupled.

Source: FiBL & IFOAM 2015
Growth of the organic agricultural land 2012-2013 by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2012/2013

<table>
<thead>
<tr>
<th>Region</th>
<th>Organic agr. land [ha] 2012</th>
<th>Organic agr. land [ha] 2013</th>
<th>+/- hectares</th>
<th>+/- percent %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>1'149'461</td>
<td>1'222'374</td>
<td>+72'913</td>
<td>+6.34%</td>
</tr>
<tr>
<td>Asia</td>
<td>3'218'701</td>
<td>3'425'939</td>
<td>+207'237</td>
<td>+6.44%</td>
</tr>
<tr>
<td>Europe</td>
<td>11'135'208</td>
<td>11'460'773</td>
<td>+325'565</td>
<td>+2.92%</td>
</tr>
<tr>
<td>Latin America</td>
<td>6'813'540</td>
<td>6'611'636</td>
<td>-201'904</td>
<td>-2.96%</td>
</tr>
<tr>
<td>North America</td>
<td>3'012'354</td>
<td>3'047'710</td>
<td>+35'356</td>
<td>+1.17%</td>
</tr>
<tr>
<td>Oceania</td>
<td>12'164'316</td>
<td>17'321'733</td>
<td>+5'157'417</td>
<td>+42.40%</td>
</tr>
<tr>
<td>Total**</td>
<td>37'490'215</td>
<td>43'085'219</td>
<td>+5'595'003</td>
<td>+14.92%</td>
</tr>
</tbody>
</table>

Source: FiBL-IFOAM survey 2015, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 281.
** Total includes correction value for French Overseas Departments.
Growth of the organic farmland 1999-2013

Source: FiBL-IFOAM-SOEL-Surveys 1999-2015
Development of organic agricultural land in the regions

Development of organic agricultural land in the regions 1999-2013

Source: FiBL-IFOAM-SOEL-Surveys 1999-2015
Growth of organic agricultural land by region 2013

Growth of the organic agricultural land by continent 1999-2013

Source: FiBL-IFOAM-SOEL-Surveys 1999-2015
Growth of organic farmland by continent 2013

Growth of the organic agricultural land by continent 2005-2013

Source: FiBL-IFOAM survey 2015
Growth of organic farmland 2012-2013

The ten countries with the highest increase of organic land 2013

Source: FiBL-IFOAM survey 2015

<table>
<thead>
<tr>
<th>Country</th>
<th>Increase (Hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>+5'148'276</td>
</tr>
<tr>
<td>China</td>
<td>+194'000</td>
</tr>
<tr>
<td>Peru</td>
<td>+190'611</td>
</tr>
<tr>
<td>Italy</td>
<td>+149'815</td>
</tr>
<tr>
<td>Ukraine</td>
<td>+120'550</td>
</tr>
<tr>
<td>Sudan</td>
<td>+86'634</td>
</tr>
<tr>
<td>Portugal</td>
<td>+71'381</td>
</tr>
<tr>
<td>Canada</td>
<td>+35'355</td>
</tr>
<tr>
<td>Paraguay</td>
<td>+33'775</td>
</tr>
<tr>
<td>France</td>
<td>+27'815</td>
</tr>
</tbody>
</table>
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 more than 35 million hectares.

› In total, 78 million hectares – agricultural land and other areas – were organic in 2013.

Source: FiBL & IFOAM 2015
Wild collection and beekeeping areas

› 34.1 million hectares of wild collection and bee-keeping areas were reported for 2013.

› 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 2014), and wild collection activities are regulated in organic laws.

Source: FiBL & IFOAM 2015
Wild collection areas by region 2013

Distribution of organic wild collection areas by region 2013

Source: FiBL-IFOAM Survey 2015

- Europe: 39.2%
- Africa: 29.7%
- Asia: 22.9%
- Latin America: 8.1%
- North America: 0.2%
- North America: 0.2%
- North America: 0.2%
- North America: 0.2%
- North America: 0.2%
Organic wild collection 2013: Top 10 countries

The ten countries with the largest wild collection areas 2013

Source: FiBL-IFOAM survey 2015

- Finland: 9.00 Million hectares
- India: 5.18 Million hectares
- Namibia: 2.40 Million hectares
- China: 1.44 Million hectares
- Brazil (2012): 1.21 Million hectares
- Romania (2012): 1.08 Million hectares
- Tajikistan (2012): 1.06 Million hectares
- Turkey: 0.96 Million hectares
- Morocco: 0.82 Million hectares
Organic producers 2013

› For the current survey, a total of 2 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 (650’000), followed by Uganda (189’610) and Mexico (169’703).

› This is an increase of more than 70’000 producers compared with 2012, or 5 percent.

› It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2 million.

Source: FiBL & IFOAM 2015
Organic producers 2013

The ten countries with the largest numbers of organic producers 2013
Source: FiBL-IFOAM survey 2015

- India: 650,000
- Uganda: 186,778
- Mexico: 169,703
- Tanzania: 148,610
- Ethiopia: 135,827
- Turkey: 65,042
- Peru: 52,284
- Italy: 45,969
- Spain: 30,502
- Poland (2012): 25,944

Number of producers
Organic producers by region 2013

Source: FiBL-IFOAM Survey 2015

- Asia: 36%
- Africa: 29%
- Europe: 17%
- Latin America: 16%
- North America: 1%
- Oceania: 1%
- North America: 1%
- Oceania: 1%

Organic producers by region 2013
Development of organic producers 1999-2013

Development of the number of organic producers 1999-2013
Source: FiBL-IFOAM-SOEL-Surveys 1999-2015
The global market for organic food and beverages 2013

› In 2013, the global market for certified organic food and drink was estimated to be 72 billion US Dollars according to Organic Monitor (Sahota 2015).

› The turnover with organic products has more than fivefold since 1999.

› More than ninety percent of the organic product revenues is made in the North America and Europe (Sahota 2015).

› In 2013, the by far largest market was the United States with 24.3 billion euros of organic food sales, followed by Germany with 7.6 billion euros and France with 4.4 billion euros (FiBL-AMI-OrganicDataNetwork 2015).

› The highest annual per capita consumption was in Switzerland (210 euros) and in Denmark (163 euros) (FiBL-AMI-OrganicDataNetwork 2015).

› Denmark, Switzerland and Austria have the highest share of organic food sales. In 2013 total food market value was not available for most of the countries, and it was therefore not possible to calculate the organic share for most countries.
Global market: Distribution of retail sales by single market 2013

Global market: Distribution of retail sales value by single markets 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015, based on retail sales with organic food
Distribution of organic retail sales 2013

Global market: Distribution of retail sales value by country 2013
Source: FiBL-AMI-OrganicDataNetwork survey 2015, based on retail sales with organic food
The largest markets for organic food 2013

The ten countries with the largest markets for organic food 2013
Source: FiBL-AMI-OrganicDataNetwork survey 2015

- United States of America: 24,347 million Euros
- Germany: 7,550 million Euros
- France: 4,380 million Euros
- China: 2,430 million Euros
- Canada: 2,375 million Euros
- United Kingdom: 2,065 million Euros
- Italy: 2,020 million Euros
- Switzerland: 1,668 million Euros
- Austria: 1,065 million Euros
- Sweden: 1,018 million Euros
Growth of retail sales in Germany 2000-2013

Germany: Growth of organic food and beverages retail sales 2000-2013
Source: FiBL-AMI surveys 2000-2015
Growth of retail sales in France 2000-2013

France: Growth of organic food and beverages retail sales 2000-2013
Source: FiBL-AMI surveys 2000-2015
Per capita consumption 2013

The ten countries with the highest per capita consumption 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015

- Switzerland: 210 euros
- Denmark: 163 euros
- Luxembourg: 157 euros
- Liechtenstein: 129 euros
- Austria: 127 euros
- Sweden: 106 euros
- Germany: 93 euros
- USA: 77 euros
- Canada: 71 euros
- France: 69 euros
Organic farming in developing & transition countries 2013

› Almost a quarter of the world’s organic agricultural land – 11.7 million hectares - is located in developing/transitio
n countries and in emerging markets.* Most of this land is in Latin American countries, with Asia and Africa in second and third place.

› 1.7 million producers are in these countries.


Source: FiBL-IFOAM Survey 2015, based on national data sources
DAC list: The top 10 countries with the largest areas of organic agricultural land 2013

The ten countries on the DAC list with the largest areas of organic agricultural land 2013

Source: FiBL-IFOAM survey 2015

- Argentina
- China
- Uruguay (2006)
- Brazil (2012)
- India
- Mexico
- Turkey
- Ukraine
- Peru
- Kazakhstan (2012)

Million hectares

0.00 0.50 1.00 1.50 2.00 2.50 3.00 3.50

Million hectares
DAC list: The top 10 countries with the highest shares of organic agricultural land 2013

The ten countries on the DAC list with the highest shares of organic agricultural land 2013

Source: FiBL-IFOAM survey 2015

- Samoa (2012) - 11.8%
- Dominican Republic - 9.3%
- Sao Tome and Principe (2012) - 7.2%
- Timor-Leste (2012) - 6.6%
- Uruguay (2006) - 6.3%
- Mongolia - 4.7%
- Mexico - 2.3%
- Egypt (2012) - 2.3%
- Argentina - 2.3%
- Vanuatu - 1.7%
More information

› More information (PDF, data sources, graphs) at http://www.organic-world.net/yearbook/yearbook2015.html

› Contact
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Disclaimer

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