Organic Agriculture Worldwide:
Key results from the FiBL survey on organic agriculture worldwide 2016
Part 3: Organic agriculture in the regions 2014

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Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2016: Part 3: Organic agriculture in the regions 2014

› Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, 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/yearbook2016/slide-presentations.html

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› 200 experts from all parts of the world contributed to the FiBL survey 2016.

* See also disclaimer on last page of this slide show
The World of Organic Agriculture 2016

› The 17th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2016.*

› Contents:
  › Results of the survey on organic agriculture worldwide;
  › Organic agriculture in the regions and country reports; Australia, Canada, the Pacific Islands, and The United States of America.
  › Chapters on the global market, standards & legislations, voluntary standards, PGS, European market, data collection in Thailand and Australia.
  › Numerous tables and graphs.
  › New additions: Better Data: highlights examples of how organic market data are collected and associated challenges.
  › Commodity case studies: a section for the analysis of selected commodities.
  › 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 survey on organic agriculture worldwide 2016 (data 2014). 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/yearbook2016/slide-presentations.html:
  - Part 1: Global data 2014 and survey background
  - Part 2: Land use and key crops in organic agriculture 2014
  - Part 3: Organic agriculture in the regions 2014
The 17th Survey on organic agriculture worldwide

- The 17th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in cooperation with partners from all around the world. The results were published jointly by FiBL and IFOAM – Organics International.
- The survey was carried out between July 2015 and February 2016.
- Data were received from 172 countries.
- New countries included: Kiribati, Puerto Rico, Suriname, and the US Virgin Islands.
- Updated data on area and producers were available for 135 countries.
- Data was provided by almost 200 country experts (representatives from NGOs, certification bodies, governments, researchers).
- The following data was collected: area data (including land use and crop details); producers, other operator types; domestic market values; export and import data; and livestock data (animal heads and production in metric tons);
- The results are published in the yearbook “The World of Organic Agriculture 2016” and at www.organic-world.net.
Africa: Organic agricultural land by country 2014

Source: FiBL survey 2016, based on national sources and data from certifiers.
In Africa, there were 1.3 million hectares of certified organic agricultural land (data 2014).

This constitutes about three percent of the world’s organic agricultural land.

More than 593’000 producers were reported.

The countries with the most organic land are Uganda (240’197 hectares), Tanzania (186’537 hectares, 2013), and Ethiopia (160’987 hectares, 2013).

The highest shares of organic land are in Sao Tome and Prince (12 percent), Egypt (2.3 percent), and Uganda (1.7 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 survey 2016
Africa: Development of organic agricultural land 2000-2014

Africa: Development of organic agricultural land 2000 to 2014

Source: FiBL-IFOAM-SOEL 2001-2016
Africa: The ten countries with the most organic agricultural land 2014

Africa: The ten countries with the largest organic area 2014

Source: FiBL survey 2016

<table>
<thead>
<tr>
<th>Country</th>
<th>Hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uganda</td>
<td>240,197</td>
</tr>
<tr>
<td>Tanzania (2013)</td>
<td>186,537</td>
</tr>
<tr>
<td>Ethiopia (2013)</td>
<td>160,987</td>
</tr>
<tr>
<td>Tunisia (2013)</td>
<td>139,087</td>
</tr>
<tr>
<td>Sudan</td>
<td>130,000</td>
</tr>
<tr>
<td>Congo DR</td>
<td>89,058</td>
</tr>
<tr>
<td>Egypt (2012)</td>
<td>85,801</td>
</tr>
<tr>
<td>Madagascar</td>
<td>30,265</td>
</tr>
<tr>
<td>Namibia</td>
<td>30,082</td>
</tr>
<tr>
<td>Burkina Faso</td>
<td>20,110</td>
</tr>
</tbody>
</table>
Africa: Distribution of organically managed agricultural land by country 2014

Source: FiBL survey 2016
Africa: The ten countries with the highest shares of organic agricultural land 2014

Africa: The countries with the highest share of organic agricultural land 2014

Source: FiBL survey 2016

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total agricultural land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sao Tome and Principe</td>
<td>12.0%</td>
</tr>
<tr>
<td>Egypt (2012)</td>
<td>2.3%</td>
</tr>
<tr>
<td>Uganda</td>
<td>1.7%</td>
</tr>
<tr>
<td>Réunion (France)</td>
<td>1.6%</td>
</tr>
<tr>
<td>Tunisia (2013)</td>
<td>1.4%</td>
</tr>
<tr>
<td>Comoros</td>
<td>1.1%</td>
</tr>
<tr>
<td>Tanzania (2013)</td>
<td>0.5%</td>
</tr>
<tr>
<td>Togo</td>
<td>0.5%</td>
</tr>
<tr>
<td>Ethiopia (2013)</td>
<td>0.5%</td>
</tr>
<tr>
<td>Congo DR</td>
<td>0.4%</td>
</tr>
</tbody>
</table>
Africa: Use of organic agricultural land 2014

Source: FiBL survey 2016; based on information from the private sector, certifiers, and governments.

Land use types 2014

- No details 28%
- Other agri. land 0.4%
- Perm. grassland 5.6%
- Arable land crops 19%
- Permanent crops 47%

Key arable crops
- Oilseeds 123.6
- Textile crops 67.7
- Medicinal plants 20.8
- Cereals 6.8
- Vegetables 5.9

Key permanent crops
- Coffee 201.2
- Olives 125.3
- Nuts 38.9
- Cocoa 34.7
- Fruit, tropical/subtrop. 17.3
Africa: The ten countries with the largest number of organic producers 2014

- Uganda: 190,552 producers
- Tanzania (2013): 148,610 producers
- Ethiopia (2013): 135,827 producers
- Madagascar: 22,851 producers
- Senegal (2013): 18,393 producers
- Kenya (2012): 12,619 producers
- Malawi: 12,619 producers
- Zambia (2009): 10,059 producers
- Togo: 9,933 producers
- Burkina Faso: 9,032 producers

Source: FiBL survey 2016
Articles about Africa in the 2016 edition of "The World of Organic Agriculture"

› Latest Developments in Organic Agriculture in Africa, Jordan Gama
Asia: Organic agricultural land by country 2014

Source: FiBL survey 2016, based on national sources and data from certifiers.
Asia: Organic Agriculture in Asia – Key Figures 2014

› The total organic agricultural area in Asia was 3.6 million hectares in 2014.

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

› There were more than 0.9 million producers reported.

› The leading countries by organic agricultural land are China (1.9 million hectares) and India (0.7 million hectares).

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

Source: FiBL survey 2016
Asia: Development of organic agricultural land 2000-2014

Source: FiBL-IFOAM-SOEL 2002-2016
Asia: Distribution of organic agricultural land by country 2014 (total 3.6 million hectares)

- China: 54%
- India: 18%
- Kazakhstan (2012): 8%
- Rest: 20%

FiBL survey 2016
Asia: The ten countries with the most organic agricultural land 2014

Asia: The ten countries with the largest organic area 2014
Source: FiBL survey 2016

- China: 1,925,000 hectares
- India: 720,000 hectares
- Kazakhstan (2012): 291,203 hectares
- Indonesia: 113,638 hectares
- Philippines: 110,084 hectares
- Sri Lanka: 62,560 hectares
- Viet Nam: 43,007 hectares
- Thailand: 37,684 hectares
- Saudi Arabia: 37,563 hectares
- Timor-Leste: 25,479 hectares

Hectares

FiBL www.fibl.org
Asia: The ten countries/territories with the highest shares of organic agricultural land 2014

Source: FiBL survey 2016

- Timor-Leste: 6.8%
- Sri Lanka: 2.3%
- Palestine, State of: 1.9%
- Bhutan: 1.3%
- Israel: 1.3%
- Republic of Korea: 1.0%
- Philippines: 0.9%
- United Arab...: 0.8%
- Taiwan (2013): 0.7%
- Azerbaijan: 0.5%

Share of total agricultural land
Asia: Use of organic agricultural land 2014
(total: 3.6 million hectares)

Asia: Use of agricultural organic land 2014
Source: FiBL survey 2016; based on information from the private sector, certifiers, and governments.

Land use types 2014

No details 37%
Other agricultural land 2%
Permanent grassland 1%
Permanent crops 15%
Arable land crops 45%

Key arable crops
- Cereals: 755.5
- Oilseeds: 443.9
- Textile crops: 184.4
- Green fodders: 94.0
- Medicinal plants: 35.3

Key permanent crops
- Coconut: 121.8
- Coffee: 113.1
- Tea: 58.1
- Fruit, tropical/subtrop.: 52.8
- Nuts: 46.9
Articles about Asia in the 2016 Edition of "The World of Organic Agriculture"

› Organic Asia 2015, Ong Kung Wai
Europe: Organic agricultural land by country 2014

Source: FiBL survey 2016, based on national sources and Eurostat.
Organic agriculture in Europe: Key data/indicators 2014

› 11.6 million hectares of agricultural land are organic (including in conversion areas).

› This constitutes 2.4 percent of the agricultural land in Europe.

› The organic agricultural land increased by 0.26 million hectares or 2.3 percent in 2014.

› Almost 340’000 producers were reported.

FiBL-AMI survey 2016 based on Eurostat and national data sources
Organic agriculture in the European Union: Key data/indicators 2014

› 10.3 million hectares of agricultural land are organic (including in conversion areas).

› This constitutes 5.7 percent of the agricultural land in the European Union.

› The organic agricultural land increased by 0.11 million hectares or 1.1 percent in 2014.

› Almost 260’000 producers were reported.
The European market was 26.1 billion euros; 7.6 percent more than in 2013.

The largest market for organic products in 2014 was Germany with a turnover of 7.9 billion euros, followed by France (4.8 billion euros) and the UK (2.3 billion euros).

As a portion of the total market share, the highest levels have been reached in Denmark, Switzerland and Austria, with six percent or more for organic products. The highest per capita spending is also in these countries and in Luxembourg.
Europe: The ten countries with the most organic agricultural land 2014

Europe: The ten countries with the largest organic area 2014
Source: FiBL-AMI survey 2016, based on national data sources and Eurostat
Europe: Distribution of organically managed agricultural land by country 2014

Europe: Distribution of organically managed agricultural land by country 2014 (Total: 11.6 million hectares)
Source: FiBL-AMI survey 2016 based on national data sources and Eurostat
Europe: Distribution of shares of organic land 2014

Europe: Distribution of organic farmland shares 2014
Source: FiBL-AMI survey 2016

- More than 10 percent organic land
- 5 to 10 percent organic land
- 1 to 5 percent organic land
- Less than 1 percent organic land

17 countries
8 countries
9 countries
11 countries
Europe: The ten countries with the highest shares of organic agricultural land 2014

Europe: Shares of organic agricultural land by country 2014
Source: FiBL-AMI Survey 2016

- Liechtenstein: 30.9%
- Austria: 19.4%
- Sweden: 16.4%
- Estonia: 16.2%
- Switzerland: 12.7%
- Latvia: 11.2%
- Czech Republic: 11.12%
- Italy: 10.84%
- Slovakia: 9.51%
- Finland: 9.42%

Share of total area
Development of the organic agricultural land in Europe 1999-2014

Europe: Development of organic agricultural land 1985-2014
Source: Lampkin, Nic, FiBL-AMI Surveys 2006-2016, and OrganicDataNetwork Surveys 2013-2015, based on national data sources and Eurostat
Europe: Growth of organic agricultural land by country group 2000-2014

Europe: Growth of organic farmland by country group 2000-2014

Source: Lampkin, Nic, FiBL-AMI Surveys 2006-2016, and OrganicDataNetwork Surveys 2013-2015, based on national data sources and Eurostat
Europe: The 10 countries with the highest growth of organic agricultural land in 2014

Source: FiBL-AMI survey 2016 based on national data sources and Eurostat
Europe: Use of organic agricultural land 2014 (total: 11.6 million hectares)

Source: FiBL-AMI Survey 2016

Land use types 2014

- Arable crops: 43%
- Permanent grassland: 41%
- Permanent crops: 12%
- Other agricultural land: 3%
- No details: 1%

Key arable crops:
- Green fodders: 2'041.1
- Cereals: 1'911.8
- Dried pulses: 299.2
- Oilseeds: 245.7
- Vegetables: 131.9

Key permanent crops:
- Olives: 492.01
- Grapes: 266.21
- Nuts: 180.80
- Fruit, temperate: 127.61
- Citrus fruit: 38.23

Europe and European Union: Market development 2004-2014

Europe
European Union

Billion euros


11.0 11.9 13.5 15.0 16.6 18.1 19.5 21.4 22.7 24.3 26.2


10.2 11.1 12.6 14.1 15.5 16.9 18.1 19.8 20.8 22.3 23.9

Europe
European Union
Europe and European Union: Growth of per consumption of organic products

Europe and European Union: Growth of per capita consumption 2005-2014

European Union: Development of the organic market in selected European countries 2004-2014

European Union: Market development in selected countries 2004-2014

Source: AMI, Germany; Agence Bio France, AssoBio, Italy; LF Denmark

[Graph showing market development in selected countries from 2004 to 2014 with data points for Denmark, France, Germany, and Italy]
United Kingdom: Development of the organic market in the UK

United Kingdom: Market development 2004-2014
Source: Soil Association, Organic Research Centre Elm Farm. Last update: 23.2.2106
Europe: Distribution of sales of organic food and drink by country 2014 (total: 26.1 billion euros)

Europe: Distribution of retail sales 2014
Source: FiBL-AMI survey 2016

- Germany: 30%
- France: 18%
- United Kingdom: 9%
- Italy: 8%
- Switzerland: 7%
- Sweden: 5%
- Spain: 4%
- Austria: 4%
- Nether-lands: 4%
- Others: 11%
The European market for organic food and drink: The countries with the highest sales 2014

Europe: Organic retail sales value by country 2014
Source: FiBL-AMI Survey 2016

Germany 7'910
France 4'830
United Kingdom 2'307
Italy 2'145
Switzerland 1'817
Sweden 1'402
Austria (2011) 1'065
Spain (2012) 998
Netherlands 965
Denmark 912.0

Million euros
Europe: The countries with the highest per-capita consumption 2014

Source: FiBL-AMI Survey 2016

- Switzerland: 221
- Luxembourg: 164
- Denmark: 162
- Sweden: 145
- Liechtenstein: 130
- Austria: 127
- Germany: 97
- France: 73
- Netherlands: 57
- Norway: 54
- Finland: 41

Per capita consumption in euros
Articles about Europe in the 2016 Edition of "The World of Organic Agriculture"

› Organic Farming in Europe
   Helga Willer and Stephen Meredith

› Organic Farming and Market Development in Europe
   Helga Willer and Diana Schaack
Latin America/Caribbean: Organic agricultural land by country 2014

Source: FiBL survey 2016, based on national sources and data from certifiers.
Latin America: Key figures 2014

› In Latin America, more than 387’000 producers managed 6.8 million hectares of agricultural land organically in 2014.

› This constitutes 15 percent of the world’s organic land and 1.1 percent of the regions agricultural land.

› The leading countries are Argentina (3.1 million hectares), Uruguay (1.3 million hectares), and Brazil (0.7 million hectares, 2012).

› The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (36.3 percent), French Guiana (8.9 percent), and the Uruguay (8.9 percent).

Source: FiBL survey 2016
Latin America: Key figures 2014

- 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.

- Many Latin American countries remain important exporters of organic products such as bananas, cocoa and coffee; in countries such as Argentina and Uruguay, temperate fruit and meat are key export commodities. At the same time, domestic markets are trending positively in the region.

- 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.
Latin America/Caribbean: Distribution of organic agricultural land by country 2014

Latin America/Caribbean: Distribution of organic agricultural land by country 2014 (total: 6.8 million hectares)

Source: FiBL survey 2016
Latin America and Caribbean: The ten countries with the largest organic areas 2014

Source: FiBL survey 2016

- Argentina: 3'061'965 hectares
- Uruguay: 1'307'421 hectares
- Brazil (2012): 705'233 hectares
- Mexico (2013): 501'364 hectares
- Falkland Islands (Malvinas): 403'212 hectares
- Peru: 263'012 hectares
- Dominican Republic: 166'220 hectares
- Bolivia: 114'306 hectares
- Paraguay: 54'444 hectares
- Ecuador: 45'818 hectares
Latin America: The ten countries with the highest shares of organic agricultural land 2013

Latin America and Caribbean: The countries with the highest share of organic agricultural land 2014
Source: FiBL survey 2016

- Falkland Islands (Malvinas) 36.3%
- French Guiana (France) 8.9%
- Uruguay 8.8%
- Dominican Republic 8.5%
- Mexico (2013) 2.3%
- Argentina 2.2%
- Peru 1.2%
- Dominica (2011) 1.0%
- Martinique (France) 0.9%
- Honduras (2012) 0.8%

Share of total agricultural land
Latin America: Development of organically managed agricultural land 2000-2014

Latin America and Caribbean: Development of organic agricultural land 2000 to 2014

Source: FiBL-IFOAM-SOEL 2002-2016
Latin America: Use of organic agricultural land 2014 (total: 6.8 million hectares)

Latin America and Caribbean: Use of agricultural organic land 2014

Source: FiBL survey 2016; based on information from the private sector, certifiers, and governments.

Land use types 2014

- Permanent grassland 67%
- Permanent crops 12%
- Arable land crops 5%
- No details/other 16%

Key arable crops

- Cereals 123.2
- Sugarcane 61.4
- Vegetables 52.5
- Oilseeds 46.6
- Medicinal plants 13.1

Key permanent crops

- Coffee 407.8
- Cocoa 206.2
- Fruit, tropical/subtrop. 123.6
- Citrus fruit 14.4
- Coconut 13.7
Articles about Latin America and the Caribbean in the 2016 edition of "The World of Organic Agriculture"

› Organic Agriculture in Latin America and the Caribbean
  Patricia Flores Escudero and Mauricio Soberanes

› Country Report: Organic Agriculture in Brazil,
  Laercio Meirelles
North America: Organic agricultural land by country 2014

Source: USDA and COTA 2016, US data is from 2011
Organic Agriculture in North America: Key figures 2014

› In North America, 3 million hectares are managed organically, of these are two million in the United States and more 0.9 million in Canada.

› This represents 0.8 percent of the total agricultural area in the region and 7 percent of the world’s organic agricultural land.

› In 2014, the organic market continued to grow in North America, reaching 29 billion euros. In Canada, the organic market grew by over 13 percent in 2014, and in the United States the organic market grew by 11 percent. The United States is the largest single organic market in the world, and North America continues to be the continent with the largest organic market.
North America: Organic agricultural land 2014

Organic Agriculture in North America 2014
Source: COTA and USDA

- United States of America (2011): 2,178,471 hectares
- Canada: 903,948 hectares
North America: Distribution of organic agricultural land by country 2014 (Total: 3 million hectares)

Source: COTA and USDA

United States (2011): 71%
Canada: 29%
North America: Shares of organic agricultural land 2014

North America: Organic share of total organic agricultural land 2014
Source: COTA and USDA

United States of America (2011) 0.6%
Canada 1.3%
Share of total agricultural land

Source: COG-COTA and USDA
North America: Use of organic agricultural land 2014 (total: 3 million hectares)

North America: Land use in organic agriculture 2014
Source: COTA and USDA

Land use types 2014

- Arable land crops: 40%
- Other agri. land: 3%
- Permanent grassland: 42%
- Permanent crops: 2%
- No details: 13%

Key arable crops
- Cereals: 557.3
- Green fodders: 430.5
- Oilseeds: 123.9
- Vegetables: 64.3
- Protein crops: 49.2

Key permanent crops
- Temperate fruit: 19.1
- Grapes: 16.1
- Nuts: 9.5
- Berries: 8.6
- Citrus fruit: 7.5
Articles about North America in the 2016 Edition of "The World of Organic Agriculture"

› U.S. Organic Industry Continues to Grow
  Barbara Fitch Haumann

› Canada
  Marie-Eve Levert and Matthew Holmes
Oceania: Organic agricultural land by country 2014

FiBL survey 2016, based on national sources and data from certifiers.
Organic agriculture in Oceania: Key figures 2014

- This region includes Australia, New Zealand, and the Pacific Islands.
- Altogether, there are over 22,000 producers, managing 17.3 million hectares.
- This constitutes 4.1 percent of the agricultural land in the area and almost 40 percent of the world’s organic land.
- Ninety-nine percent of the organic land in the region is in Australia (17.2 million hectares, 96 percent of which is extensive grazing land), followed by New Zealand (106,753 hectares, 2012), and Samoa (40,477 hectares).
- The highest shares of all agricultural land are in Samoa (14.3 percent), followed by Tonga (6.4 percent), Solomon Islands (6.3 percent), and Kiribati (4.7 percent).
Oceania: Organic agricultural land 2014

Oceania: Organic agricultural land by country 2014
Source: FiBL survey 2016

- Australia (2013) 17,150,000
- New Zealand (2012) 106,753
- Samoa 40,477
- Papua New Guinea 19,796
- Fiji 9,218
- Vanuatu 6,594
- Solomon Islands 5,302
- Tonga 1,997
- Kiribati 1,600
- New Caledonia 411
- Niue 164
- French Polynesia 93
- Cook Islands 10

Hectares

0 5,000,000 10,000,000 15,000,000 20,000,000
Oceania: Development of organic agricultural land 2000-2014

Source: FiBL-IFOAM-SOEL 2002-2016
Oceania: Shares of organic agricultural land 2014

Source: FiBL survey 2016

- Samoa: 14.3%
- Tonga: 6.4%
- Solomon Islands: 6.3%
- Kiribati: 4.7%
- Australia (2013): 4.2%
- Vanuatu: 3.5%
- Niue: 3.3%
- Fiji: 2.2%
- Papua New Guinea: 1.7%
- New Zealand (2012): 0.9%
- Cook Islands: 0.3%
- New Caledonia: 0.2%
- French Polynesia: 0.2%
Oceania: Use of organic agricultural land 2014
(totals: 17.3 million hectares)

Source: FiBL survey 2016

- Permanent grassland: 96%
- No details: 4%
Articles about Oceania in the 2016 Edition of "The World of Organic Agriculture"

› Australia
  Dr Andrew Monk and Annabelle Bushell

› The Pacific Islands
  Karen Mapusua
References and data sources


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

More information

- More information (PDF, data sources, graphs) at http://www.organic-world.net/yearbook/yearbook-2016.html

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