Organic Agriculture Worldwide 2017: Current Statistics

Helga Willer and Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland

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The World of Organic Agriculture 2017
www.organic-world.net

› The 18th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2017.*
› Data tables: Area including crop details, operators, retail sales (global and regional totals, country data)
› Regional reports
› Chapters on the global market, standards & regulations, PGS
› Specials 2017: Policy support, Textile Exchange on organic cotton, Organic and Fairtrade Market, Metadata FiBL survey
› Get your copy at the FiBL Stand in Hall 1/555 or the stand of IFOAM - Organics International (1/451)
› www.organic-world.net
Acknowledgements

› The Swiss State Secretariat of Economic Affairs SECO, Berne

› International Trade Centre ITC

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

› 200 experts from all parts of the world contributed to the FiBL survey 2017.
Another record year: Key data/indicators related to area and producers 2015

› 179 countries have data on organic agriculture.
› 50.9 million hectares of agricultural land are organic (including conversion areas).
› 6.5 million hectares more than in 2014
› 1.1 percent of the agricultural land is organic
› In 11 countries 10 percent or more of the farmland is organic
› 2.4 million producers were reported, more than three quarters are in developing countries.
Development of the number of countries with data on organic agriculture

Source: FiBL-IFOAM-SOEL-Surveys 1999-2017
Organic agricultural land and other areas 2015

Source: FiBL Survey 2017, based on data from governments, the private sector and certifiers.
The ten countries with the most organic agricultural land 2015

<table>
<thead>
<tr>
<th>Country</th>
<th>Organic Agricultural Land ( Million hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>22.69</td>
</tr>
<tr>
<td>Argentina</td>
<td>3.07</td>
</tr>
<tr>
<td>United States of America</td>
<td>2.03</td>
</tr>
<tr>
<td>Spain</td>
<td>1.97</td>
</tr>
<tr>
<td>China</td>
<td>1.61</td>
</tr>
<tr>
<td>Italy</td>
<td>1.49</td>
</tr>
<tr>
<td>France</td>
<td>1.38</td>
</tr>
<tr>
<td>Uruguay</td>
<td>1.31</td>
</tr>
<tr>
<td>India</td>
<td>1.18</td>
</tr>
<tr>
<td>Germany</td>
<td>1.09</td>
</tr>
</tbody>
</table>

The ten countries with the largest areas of organic agricultural land 2015

Source: FiBL survey 2017
The countries with the highest shares of organic agricultural land 2015

Countries with organic shares of at least 10 percent 2015
Source: FiBL survey 2017

- Liechtenstein: 30.2%
- Austria: 21.3%
- Sweden: 16.9%
- Estonia: 16.5%
- Sao Tome and Principe: 13.8%
- Switzerland: 13.1%
- Latvia: 12.8%
- Falkland Islands (Malvinas): 12.5%
- Italy: 11.7%
- Czech Republic: 11.3%
- Finland: 10.0%
World: Growth of the organic farmland and organic share 1999-2015

Source: FiBL-IFOAM-SOEL-Surveys 1999-2017
World: Growth of organic agricultural land by region 2015

Growth of the organic agricultural land by continent 1999-2015

Source: FiBL-IFOAM-SOEL-Surveys 1999-2017
World: Growth of organic farmland by continent 2015

Growth of the organic agricultural land by continent 2006-2015
Source: FiBL-IFOAM survey 2008-2017

The ten countries with the highest increase of organic land 2015
Source: FiBL survey 2017

- Australia: +4'350'000
- United States of...: +474'810
- India: +460'000
- Spain: +258'095
- France: +256'483
- Kenya: +145'585
- Russian Federation: +139'294
- Philippines: +124'558
- Italy: +104'666
- Madagascar: +90'746

Development of the organic land by land use type 2004-2015
Source: FiBL-IFOAM-SOEL-Surveys 1999-2017

- Arable crops
- Permanent crops
- Permanent grassland

Million hectares

<table>
<thead>
<tr>
<th>Year</th>
<th>Arable Crops</th>
<th>Permanent Crops</th>
<th>Permanent Grassland</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>3.5</td>
<td>0.9</td>
<td>21.8</td>
</tr>
<tr>
<td>2005</td>
<td>4.4</td>
<td>1.4</td>
<td>20.1</td>
</tr>
<tr>
<td>2006</td>
<td>4.5</td>
<td>1.4</td>
<td>20.4</td>
</tr>
<tr>
<td>2007</td>
<td>4.9</td>
<td>1.9</td>
<td>20.0</td>
</tr>
<tr>
<td>2008</td>
<td>5.1</td>
<td>2.0</td>
<td>22.3</td>
</tr>
<tr>
<td>2009</td>
<td>5.8</td>
<td>2.5</td>
<td>22.9</td>
</tr>
<tr>
<td>2010</td>
<td>6.5</td>
<td>2.6</td>
<td>23.1</td>
</tr>
<tr>
<td>2011</td>
<td>7.6</td>
<td>2.9</td>
<td>22.6</td>
</tr>
<tr>
<td>2012</td>
<td>7.9</td>
<td>3.2</td>
<td>27.0</td>
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<tr>
<td>2013</td>
<td>8.5</td>
<td>3.3</td>
<td>28.3</td>
</tr>
<tr>
<td>2014</td>
<td>8.8</td>
<td>3.4</td>
<td>33.1</td>
</tr>
<tr>
<td>2015</td>
<td>10.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

www.fibl.org
World: Use of organic agricultural land 2015 (total: 50.9 million hectares)

Distribution of main land use types and crop categories 2015

Source: FiBL Survey 2017; based on information from the private sector, certifiers, and governments.

Land use types 2015
- Arable land crops 20%
- Permanent crops 8%
- Permanent grassland 65%
- Other agr. land 2%

Key arable crops
- Cereals 3.36
- Vegetables 0.37
- Dried pulses 0.29

Key permanent crops
- Coffee 0.74
- Olives 0.63
- Grapes 0.32
- Nuts 0.29
- Cocoa 0.25
Development of organic arable and permanent crops/crop groups 2004-2015

Development of organic arable crop groups 2004-2015
Source: FiBL-IFOAM-SOEL survey 2006-2017

Development of organic permanent crops/crop groups 2004-2015
Source: FiBL-IFOAM-SOEL survey 2006-2017
Organic producers 2015

› For the current survey, a total of almost 2.4 million organic producers were reported.
› According to the data obtained, more than three quarters of the producers are located in developing and transition countries.
› The country with the most producers is India (585’200), followed by Ethiopia (203’302) and Mexico (200’039).
› It should be noted that not all certifiers reported the number of producers; their number is probably higher than 2.4 million.
World: The ten countries with the largest numbers of organic producers 2015

The ten countries with the largest numbers of organic producers 2015

Source: FiBL survey 2017

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of producers</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>585,200</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>203,602</td>
</tr>
<tr>
<td>Mexico</td>
<td>200,039</td>
</tr>
<tr>
<td>Uganda</td>
<td>190,670</td>
</tr>
<tr>
<td>Philippines</td>
<td>165,958</td>
</tr>
<tr>
<td>Tanzania</td>
<td>148,610</td>
</tr>
<tr>
<td>Peru</td>
<td>96,857</td>
</tr>
<tr>
<td>Turkey</td>
<td>69,967</td>
</tr>
<tr>
<td>Paraguay</td>
<td>58,258</td>
</tr>
<tr>
<td>Italy</td>
<td>52,609</td>
</tr>
</tbody>
</table>

Asia 35%
Africa 30%
Latin America 19%
Europe 14%
North America 1%
Oceania 1%

Number of producers

Development of the number of organic producers 1999-2015
Source: FiBL-IFOAM-SOEL-Surveys 1999-2017
Organic by continent: Africa

- Continual growth of organic area; in 2015 strong growth of tropical fruit (avocados) and cocoa
- Major focus on exports, but domestic markets are growing, e.g. Kenya
- Strategic plan for organic ecological agriculture, endorsed by the African Union
- Only few countries have a legislation
- Very few countries have a national data collection system, FiBL collects data among international certifiers

Africa: Development of organic agricultural land 2000 to 2015
Source: FiBL-IFOAM-SOEL 2001-2017
Organic by continent: Asia

› Asia is a major exporter of organic products, but the domestic market is growing strongly
› China is the largest market in the region
› Very dynamic development in many countries
› Government support (including for PGS) in many countries
› Sikkim is the first organic state

More information: chapter by IFOAM Asia in “The World of Organic Agriculture 2017”.

Asia: Development of organic agricultural land 2000 to 2015
Source: FiBL-IFOAM-SOEL 2002-2017
Organic by continent: Europe

- Dynamic growth of area and market
- Production grows slower than demand
- Highest organic market shares and highest per capita consumption is in Europe
- Discussion on EU regulation

More information: Chapter by Willer et al. in “The World of Organic Agriculture 2017.”
Organic by continent: Latin America and Caribbean

› Latin America is a major exporter of organic products
› Many country have an organic legislation
› Economic crisis has led to a decrease of government support; however many local governments support organic agriculture.
› More information: Article by Flores in “The World of Organic Agriculture 2017”
Organic by continent: North America

- Area grows slower than the market, particularly in the US
- The US is the largest organic market worldwide; by region, North America has the largest market
- New development: Check-off programme to support organic production, marketing and research.
  - Source: Articles by Haumann and Levert & Guerra in “The World of Organic Agriculture 2017”

Source: COG-COTA and USDA, 2001-2016
Organic by continent: Oceania

- Strong area development due to increase of organic farmland in Australia, most of which are extensive grazing areas for beef cattle.

- Pacific Islands: Organic farming recognized as a development tool (Policy toolkit); Organic Tourism and Hospitality standard to link organic farming and tourism.

  More information: Articles by Lawson et al. and Mapusua in “The World of Organic Agriculture 2017”

Oceania: Development of organic agricultural land 2000-2015
Source: FiBL-IFOAM-SOEL 2002-2017
In Oceania there were 22.8 Mio ha, in Europe 12.7 Mio ha, and in Latin America 6.7 Mio ha.

The ten countries with the largest organic agricultural areas represent 74% of the world’s organic agricultural land.

11 countries have 10% or more of their agricultural land under organic management.

In 2015, almost 6.5 million hectares more were reported compared with 2014.

Distribution of organic agricultural land by region 2015

The five countries with the largest areas of organic agricultural land 2015

Top 5 countries, where more than 10 percent of the farmland is organic 2015

Growth of the organic agricultural land 1999-2015

Source: FiBL survey 2017 www.organic-world.net
The country with the most organic producers is India, followed by Ethiopia and Mexico.

More than 84% of the producers are in Asia, Africa, and Latin America.

There has been an increase in the number of producers by more than 160,000, or over 21% since 2014.

The five countries with the largest numbers of organic producers 2015

Distribution of organic producers by region 2015

Development of the number of organic producers 1999-2015

Source: FiBL survey 2017 www.organic-world.net
WORLD: ORGANIC LAND USE 2015

10 Mio ha arable land

Arable land represents 0.7% of the world's arable crop land, 10 Mio ha, and 19.6% of the world's organic agricultural land. It increased by 12.9% over 2014.

+19% more permanent crops

Organic permanent crops represent 2.5% of the world's permanent cropland, 4 Mio ha, and a 8% of the organic agricultural land. They increased by 19% over 2014.

65% grassland

Permanent grassland represents 1.0% of the world's permanent grassland, 33.1 Mio ha, and a 65% of the organic agricultural land. It increased by 17% over 2014.

39.4 Mio ha of wild collection

The organic wild collection areas are concentrated in Europe, Africa, Asia, and Latin America.

Organic arable land by region 2015
Organic arable land: Key crops 2015

Organic permanent crops by region 2015
Organic permanent crops: Key crops 2015

Organic permanent grassland by region 2015
Organic permanent grassland: The five countries with the largest areas 2015

Organic wild collection by region 2015
Organic wild collection: The five countries with the largest areas 2015

Source: FiBL survey 2017 www.organic-world.net
The World of Organic Agriculture 2015

**Organic Land 2015**
- North America: 3.0m ha
- Europe: 12.7m ha
- Asia: 4.0m ha
- Latin America: 6.7m ha
- Africa: 1.7m ha
- Oceania: 22.8m ha

**Organic Producers 2015**
- Number of organic producers is increasing
- 2.4 million Organic farmers
- +7.2% From 2014

**Organic Market 2015**
- The global market is growing and consumer demand is increasing
- Approx. 75 Global organic food market in billion euros
- Top 3 countries (market in billion euros)
  - USA: 35.8
  - Germany: 8.6
  - France: 5.5

**Top 3 countries (land in millions of hectares)**
- Australia: 22.7
- Argentina: 3.1
- USA: 2.0

**Top 3 countries (number of producers)**
- India: 585,000
- Ethiopia: 203,602
- Mexico: 200,039

Source: FiBL survey based on national sources © FiBL 2017
More information: www.organic-world.net

Resources

› Print version: shop.fibl.org
› Slides and infographics at www.organic-world.net
› Interactive maps at www.organic-world.net
› Interactive datatables at www.organic-world.net
› Interactive infographics at www.ifoam-eu.org
› Twitter.com/fiblstatistics
The World of Organic Agriculture 2017 at at www.organic-world.net/yearbook.html

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Interactive data tables: www.organic-world.net/statistics.html

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Area, all [ha]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Afghanistan</td>
<td>2015</td>
<td>81,40</td>
</tr>
<tr>
<td>Albania</td>
<td>2015</td>
<td>818.00</td>
</tr>
<tr>
<td>Algeria</td>
<td>2015</td>
<td>1480.00</td>
</tr>
<tr>
<td>Andorra</td>
<td>2016</td>
<td>2.00</td>
</tr>
<tr>
<td>Argentina</td>
<td>2015</td>
<td>2023411.51</td>
</tr>
<tr>
<td>Armenia</td>
<td>2015</td>
<td>1392.00</td>
</tr>
<tr>
<td>Australia</td>
<td>2015</td>
<td>229020900.00</td>
</tr>
<tr>
<td>Austria</td>
<td>2015</td>
<td>502570.00</td>
</tr>
<tr>
<td>Azerbaijan</td>
<td>2015</td>
<td>37530.00</td>
</tr>
<tr>
<td>Bahamas</td>
<td>2015</td>
<td>46.86</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>2015</td>
<td>5356.00</td>
</tr>
<tr>
<td>Belgium</td>
<td>2015</td>
<td>55917.00</td>
</tr>
<tr>
<td>Belize</td>
<td>2016</td>
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<td>Benin</td>
<td>2016</td>
<td>23964.35</td>
</tr>
<tr>
<td>Bhutan</td>
<td>2016</td>
<td>6940.59</td>
</tr>
<tr>
<td>Bolivia</td>
<td>2015</td>
<td>1143356.63</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>2015</td>
<td>572.63</td>
</tr>
<tr>
<td>Brazil</td>
<td>2015</td>
<td>7200000.00</td>
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<tr>
<td>Burkina Faso</td>
<td>2015</td>
<td>23922.04</td>
</tr>
<tr>
<td>Burundi</td>
<td>2015</td>
<td>163.83</td>
</tr>
<tr>
<td>Cambodia</td>
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<tr>
<td>Cameroon</td>
<td>2015</td>
<td>378.89</td>
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<tr>
<td>Canada</td>
<td>2015</td>
<td>944550.43</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>2016</td>
<td>495.42</td>
</tr>
<tr>
<td>Channel Islands</td>
<td>2016</td>
<td>160.00</td>
</tr>
<tr>
<td>Chile</td>
<td>2016</td>
<td>12912.00</td>
</tr>
<tr>
<td>China</td>
<td>2016</td>
<td>1850930.40</td>
</tr>
<tr>
<td>Colombia</td>
<td>2015</td>
<td>31021.22</td>
</tr>
</tbody>
</table>

Explore data at the IFOAM/IFOAM-EU Stand in Hall 1/447
Conclusions

› In 2015 organic farming continued to grow: More organic farmland, more producers, market growth.
› However, the development varies a lot between countries and regions.
› The outlook on the organic markets continues to be good; there is scope for further growth. However, particularly in Europe, production is not keeping pace with the market development.
› For better monitoring of the development of the sector, data collection and processing need to be improved in many countries, in particular for market and international trade data.
<table>
<thead>
<tr>
<th>Indicator</th>
<th>World</th>
<th>Leading countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countries with data on certified organic agriculture</td>
<td>2015: 179 countries</td>
<td>New countries: Brunei Darussalam, Cape Verde, Hong Kong, Kuwait, Monaco, Sierra Leone, and Somalia</td>
</tr>
</tbody>
</table>
| Organic agricultural land                                     | 2015: 50.9 million hectares (1999: 11 million hectares) | Australia (22.7 million hectares)  
Argentina (3.1 million hectares)  
United States (2 million hectares) |
| Share of total agricultural land                              | 2015: 1.1 %                                | Liechtenstein (30.2 %)  
Austria (21.3 %)  
Sweden (16.9%) |
| Further, non-agricultural organic areas (mainly wild collection) | 2015: 39.7 million hectares                | Finland (12.2 million hectares)  
Zambia (6.6 million hectares)  
India (3.7 million hectares) |
| Producers                                                     | 2015: 2.3 million producers (1999: 200'000 producers) | India (585'200)  
Ethiopia (203'602)  
Mexico (200'039) |
Source: Organic Monitor | US (39.7 billion US dollars; 35.8 billion euros)  
Germany (9.5 billion US dollars; 8.6 billion euros)  
France (6.1 billion US dollars; 5.5 billion euros) |
| Per capita consumption                                        | 2015: 11.1 US dollars (10.3 euros)         | Switzerland (291 US dollars; 262 euros)  
Denmark (212 US dollars; 191 euros)  
Sweden (196 US dollars; 177 euros) |
| Number of countries with organic regulations 2015             | 2016: 87 countries                         |                                                                                   |
| Number of IFOAM affiliates                                    | 2016: 833 affiliates from 121 countries    | Germany - 91 affiliates; India - 73 affiliates; China - 55 affiliates; United States - 49 affiliates |