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Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2017 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 2017: Part 1: Global data and survey background

- › Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, based on national data sources and data from certifiers.
- › Data as published February 2017 in FiBL & IFOAM – Organics International (2017) The World of Organic Agriculture. Statistics and Emerging Trends 2017. Frick and Bonn
- › For updates check www.organic-world.net
- › This presentation is available online at: <http://www.organic-world.net/yearbook/yearbook2017/slide-presentations.html>
- › Texts and graphs: Helga Willer and Julia Lernoud; Research Institute of Organic Agriculture, FiBL, Frick, Switzerland
- › Contact: Helga Willer, helga.willer@fibl.org, and Julia Lernoud, julia.lernoud@fibl.org, Research Institute of Organic Agriculture, FiBL, Frick, Switzerland
- › © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2017

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

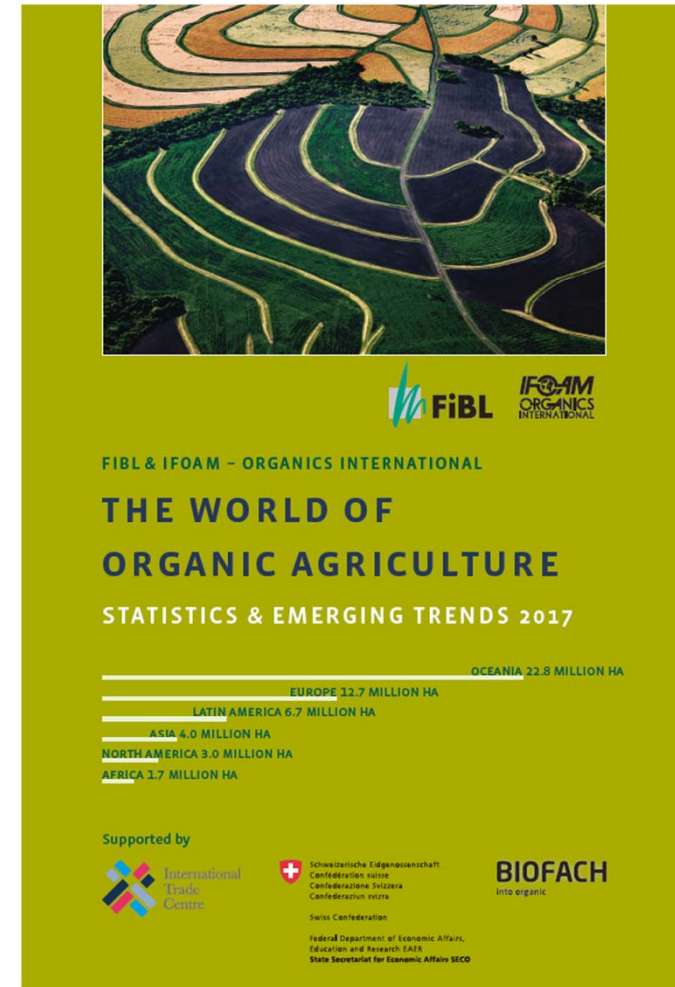


- › 200 experts from all parts of the world contributed to the FiBL survey 2017.

* See also disclaimer on last page of this slide show

The World of Organic Agriculture 2017

- › The 17th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2017.*
- › Contents:
 - › Results of the survey on organic agriculture worldwide;
 - › Organic agriculture in the regions and country reports; Australia, Canada, Kenya, the Pacific Islands, and The United States of America.
 - › Chapters on the global market, standards & legislations, voluntary standards, PGS, policy support, European market.
 - › Numerous tables and graphs.
 - › New additions:
 - › Metadata on the FiBL survey
 - › Chapter on organic cotton production by Textile Exchange
 - › Overview of the organic and Fairtrade markets
 - › The book can be ordered via IFOAM.bio and shop.FiBL.org.
 - › *Willer, H, Lernoud, J, (2017) The World of Organic Agriculture. Statistics and Emerging Trends 2017. FiBL, Frick, and, IFOAM – Organics International, Bonn



Website www.organic-world.net

- › Detailed statistics in excel format
- › Graphs & Maps
- › Data revisions
- › News and background information

The screenshot shows the 'Organic World' website with the following content:

- Organic World** - Global organic farming statistics and news
- Navigation menu: Home / News, About, Statistics, **Yearbook**, Country info, Q&A, Link library, Contact / Site info
- Breadcrumbs: Home » Yearbook
- Yearbook list (2017 to 2000-2007)
- Yearbook "The World of Organic Agriculture"**
 - Description: Published by FIBL and IFOAM, documents recent developments in global organic agriculture.
 - 2017 Edition launch: [The 2017 Edition will be launched at Biofach 2017.](#)
 - Statistics: A central part of the book are the organic agricultural statistics, which are collected annually in the frame of the [annual survey on organic agriculture worldwide.](#)
 - Funding: The project is currently funded by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), and NürnbergMesse.
- Search bar
- Logos: FIBL, International Trade Centre, Swiss State Secretariat for Economic Affairs (SECO)
- Book covers for 2017 and 2016 editions
- 2017 Edition links: [Launch](#) - [Key data](#) - [Table of contents](#) - [Press release](#) - [Order book](#) - [Infographics](#) - [Presentations](#) - [Data tables](#) - [PDF version](#) - [Corrigenda](#)

About this presentation

- › There are 3 presentations summarizing the key results of the FiBL survey on organic agriculture worldwide 2017 (data 2015). 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/yearbook2017/slide-presentations.html> :
 - › Part 1: Global data 2015 and survey background
 - › Part 2: Land use and key crops in organic agriculture 2015
 - › Part 3: Organic agriculture in the regions 2015

The 18th Survey on organic agriculture worldwide

- › The 18th 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 2016 and February 2017.
- › Data were received from 179 countries.
- › New countries included: Brunei Darussalam, Cape Verde, Hong Kong, Kuwait, Monaco, Sierra Leone, and Somalia.
- › Updated data on area and producers were available for 161 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 2017” and at www.organic-world.net.

Countries covered by the survey on organic agriculture 2015

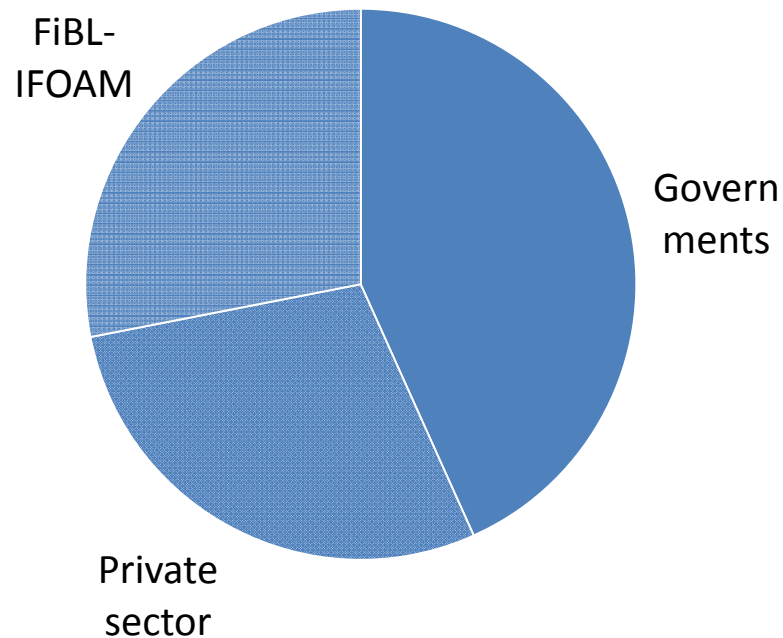
Table 1: Countries and territories covered by the global survey on organic agriculture 2015

Region	Countries* with data on organic agriculture	Countries per region ¹	Share of countries that provided data (%)
Africa	41	56	73%
Asia	41	49	84%
Europe	48	49	98%
Latin America and Caribbean	33	46	72%
North America	3	5	60%
Oceania	13	25	52%
World	179	230	78%

Source: FiBL survey 2017

*Where the designation "country" appears in this book, it covers countries or territories.²

Organic data collection systems world-wide for data on area, operators and production (total 179 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 collect the data from the international certifiers

International certifiers that provided data for several countries



Soil Association

Networks, transnational data collection efforts



General notes on the data

- › Data sources: For data sources see annex of The World of Organic Agriculture 2017 or www.organic-world.net/statistics-data-sources.html
- › Countries: For countries and territories, the FAO country list is used. Where the designation "country" appears in this report, it covers countries or territories. As to the countries' grouping by region, the Standard Country and Area Classifications as defined by the United Nations Statistics Division, is used in most cases.
- › 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 organic share of the total agricultural land or that of individual crops, based on FAOSTAT and in some cases the Eurostat data, might differ from the organic shares obtained from ministries or local experts.
- › Producers: Some countries report the number of smallholders while others report only the number of companies, projects, or grower groups, which may each comprise a number of producers. This applies in particular to many African countries. The number of producers is, therefore, probably higher than the number communicated in this report.
- › Data revisions: Should data revisions and correction become necessary these are communicated at the [data revision pages](http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2) of Organic-World.net: <http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2>.

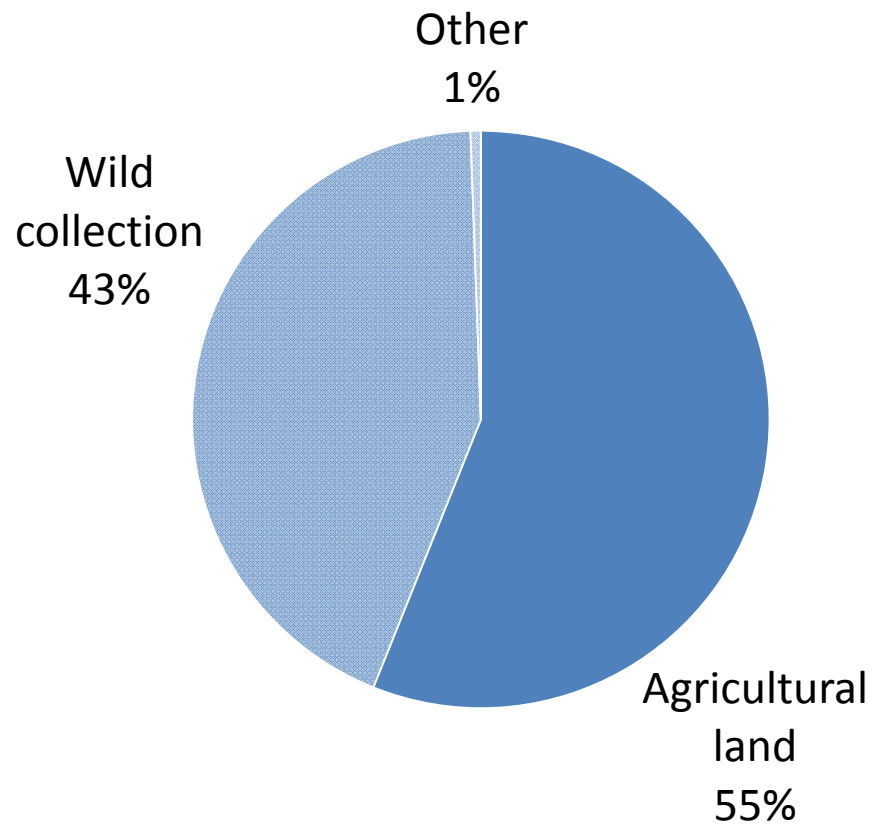
Key data/indicators on organic agriculture world-wide 2015

- › 179 countries have data on organic agriculture.
- › 50.9 million hectares of agricultural land are organic (including conversion areas).
- › 11 countries have ten percent organic agricultural land or more, and 21 countries have between 5 and 10 percent organic agricultural land.
- › There are more than 39.7 million hectares of further non agricultural areas.
- › 2.4 million producers were reported.

World: Distribution of organic areas 2015

Distribution of all organic areas in 2015

Source: FiBL Survey 2017

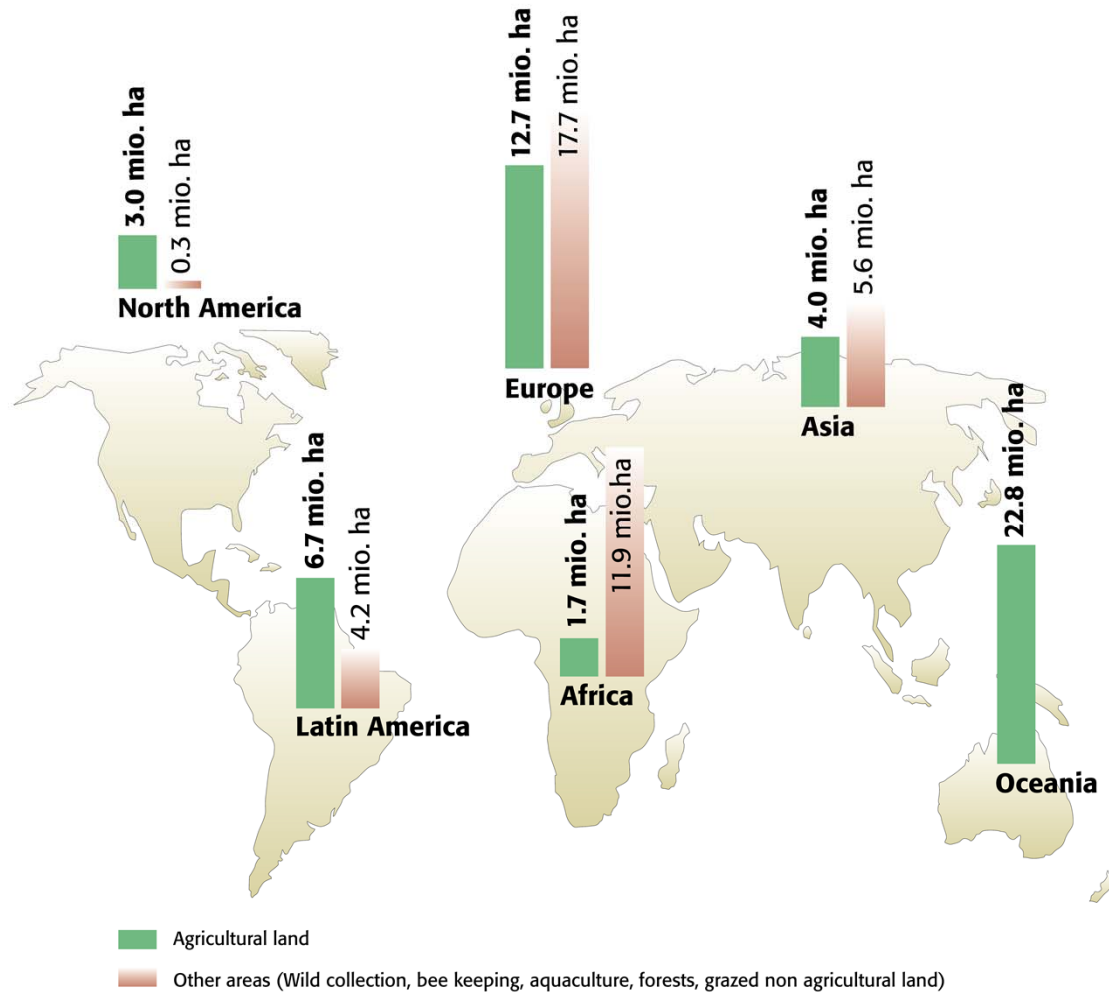


- > Agricultural land (50.9 million hectares in 2015)
 - > Cropland
 - > **Arable land** (cereals, vegetables etc.)
 - > **Permanent crops** (fruit, grapes, olives ...)
 - > **Cropland, no details** (=arable land and permanent crops with no further details)
 - > Permanent grassland
 - > Other agricultural land
- > Non-agricultural areas (39.7 million hectares in 2015)
 - > Wild collection/Bee keeping (39.4 million hectares)
 - > Forest
 - > Aquaculture
 - > Grazing areas on non-agricultural land

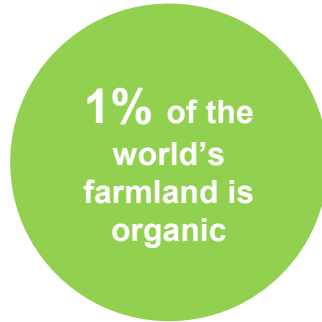
World: Organic agricultural land by region 2015

- › Currently 50.9 million hectares are under organic agricultural management (end of 2015 for most data).
- › The distribution of the organic agricultural land is as follows:
 - › Oceania (22.8 million hectares);
 - › Europe (12.7 million hectares);
 - › Latin America (6.7 million hectares),
 - › Asia (4.0 million hectares),
 - › North America (3.0 million hectares), and
 - › Africa (1.7 million hectares).
- › Oceania has 45 percent of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, has a quarter of the world's organic agricultural land followed by Latin America with 13 percent.
- › Apart from the organic agricultural land, there are further organic areas such as wild collection areas. These areas constitute more than 39.7 million hectares.

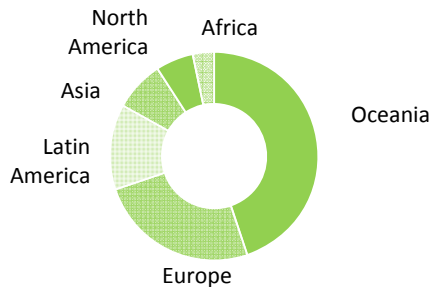
World: Organic agricultural land and other organic areas 2015



WORLD: ORGANIC FARMLAND 2015

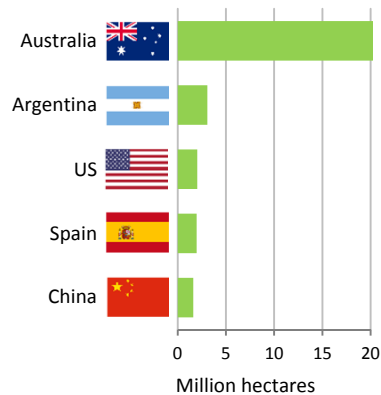


In Oceania there were 22.8 Mio ha, in Europe 12.7 Mio ha, and in Latin America 6.7 Mio ha.



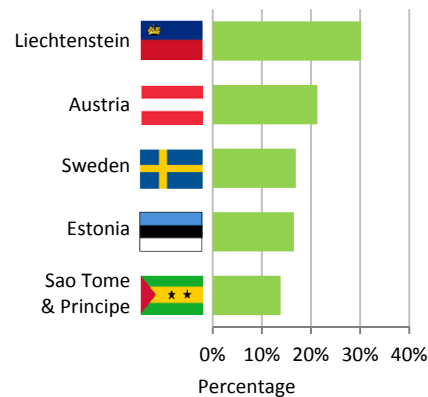
Distribution of organic agricultural land by region 2015

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



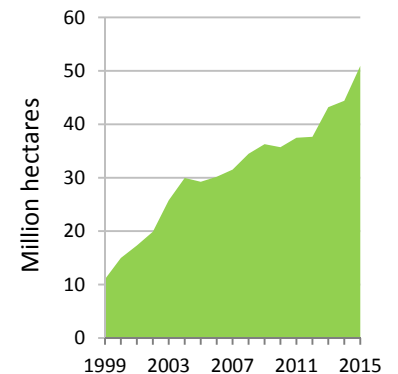
The five countries with the largest areas of organic agricultural land 2015

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



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

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

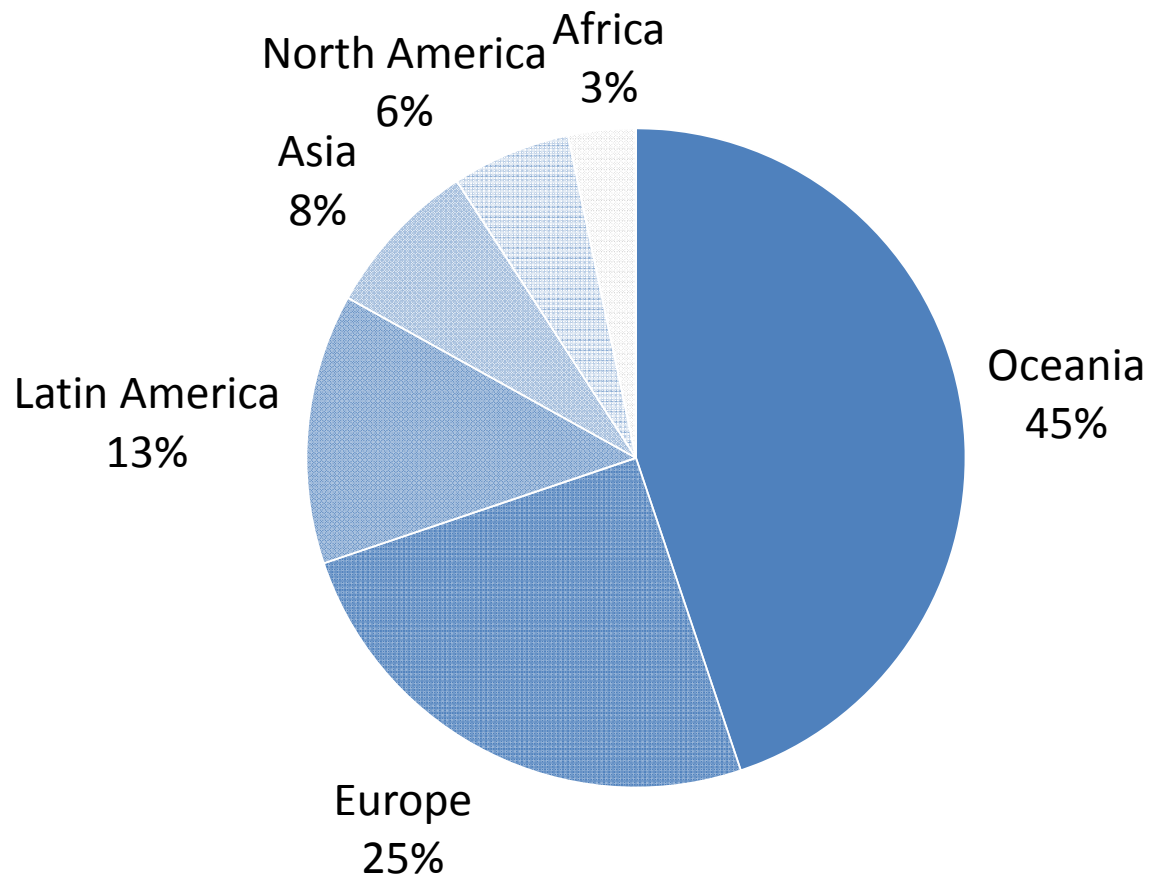


Growth of the organic agricultural land 1999-2015

World: Organic agricultural land by region 2015

Distribution of organic agricultural land by region 2015

Source: FiBL Survey 2017



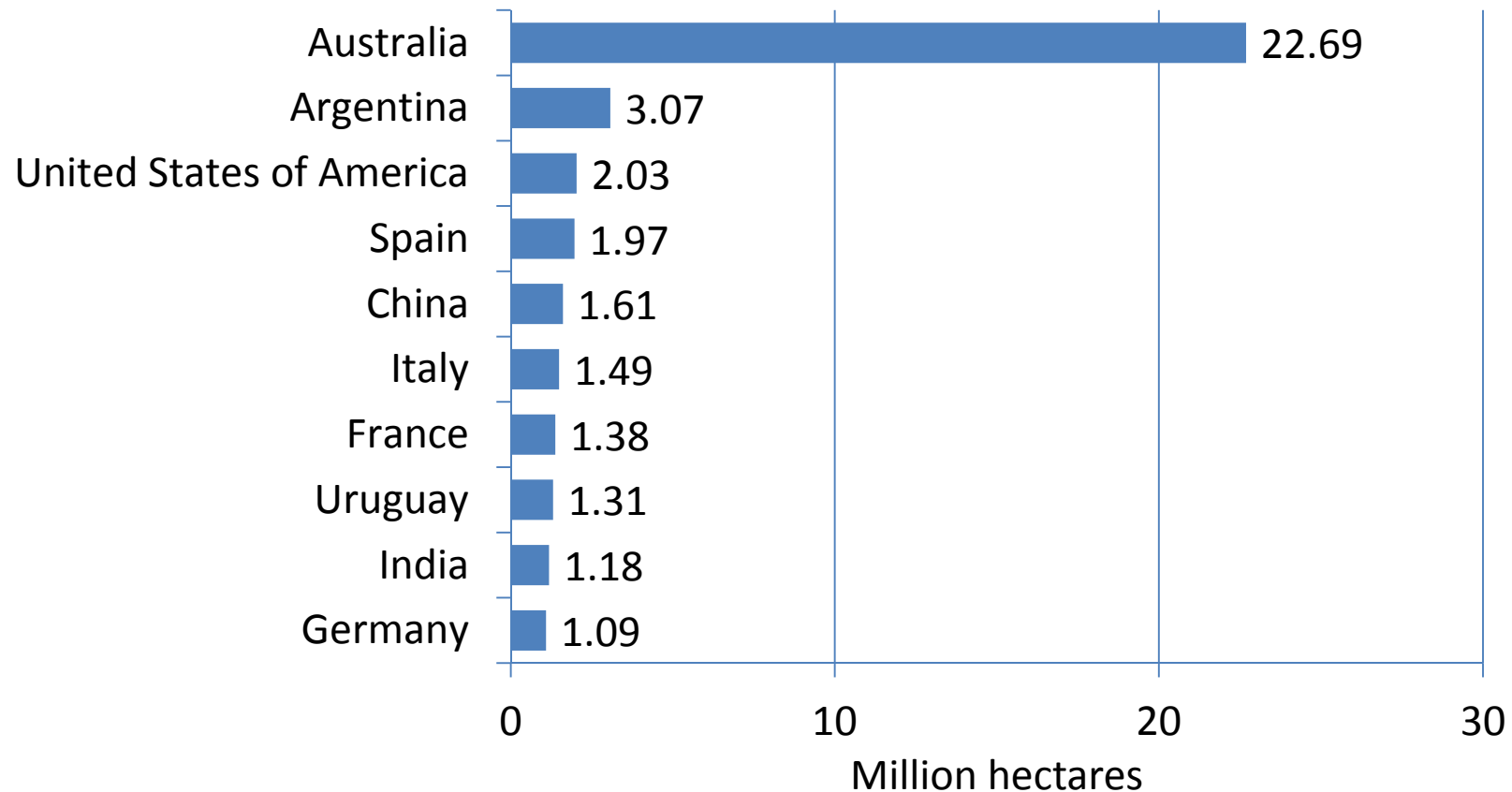
World: The countries with the most organic agricultural land 2015

- › Australia is the country with the most organic agricultural land, 97 percent of which is estimated to be 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 37.8 million hectares, constituting more than seventy percent of the world's organic agricultural land.

World: Organic agricultural land 2015: Top ten countries

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

Source: FiBL survey 2017



World: Share of organic land of total agricultural area 2015

- › The share of the world's organic agricultural of all agricultural land is 1.1 percent.
- › By region, the share is highest in Oceania (5.4 percent), followed by Europe with 2.5 percent and Latin America with 0.9 percent.
- › In the European Union, the share of organically managed land is 6.2 percent. In the other regions, the share of organically managed land is less than one percent.
- › Eleven countries have 10 percent organic land or more, and 21 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 Liechtenstein (30.2 percent), followed by Austria (21.3 percent) and Sweden (16.9 percent).
- › It is interesting to note that many island states have high shares of agricultural land under organic management, such as the Falkland Islands (Malvinas) and Samoa.

World: Shares of organic agricultural land by region 2015

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land by region 2015

Region	Organic agr. land [ha]	Share of total agri. land
Africa	1'683'482	0.1%
Asia	3'965'289	0.2%
Europe	12'716'969	2.5%
Latin America	6'744'722	0.9%
North America	2'973'886	0.7%
Oceania	22'838'513	5.4%
Total*	50'919'006	1.1%

Source: FiBL survey 2017.

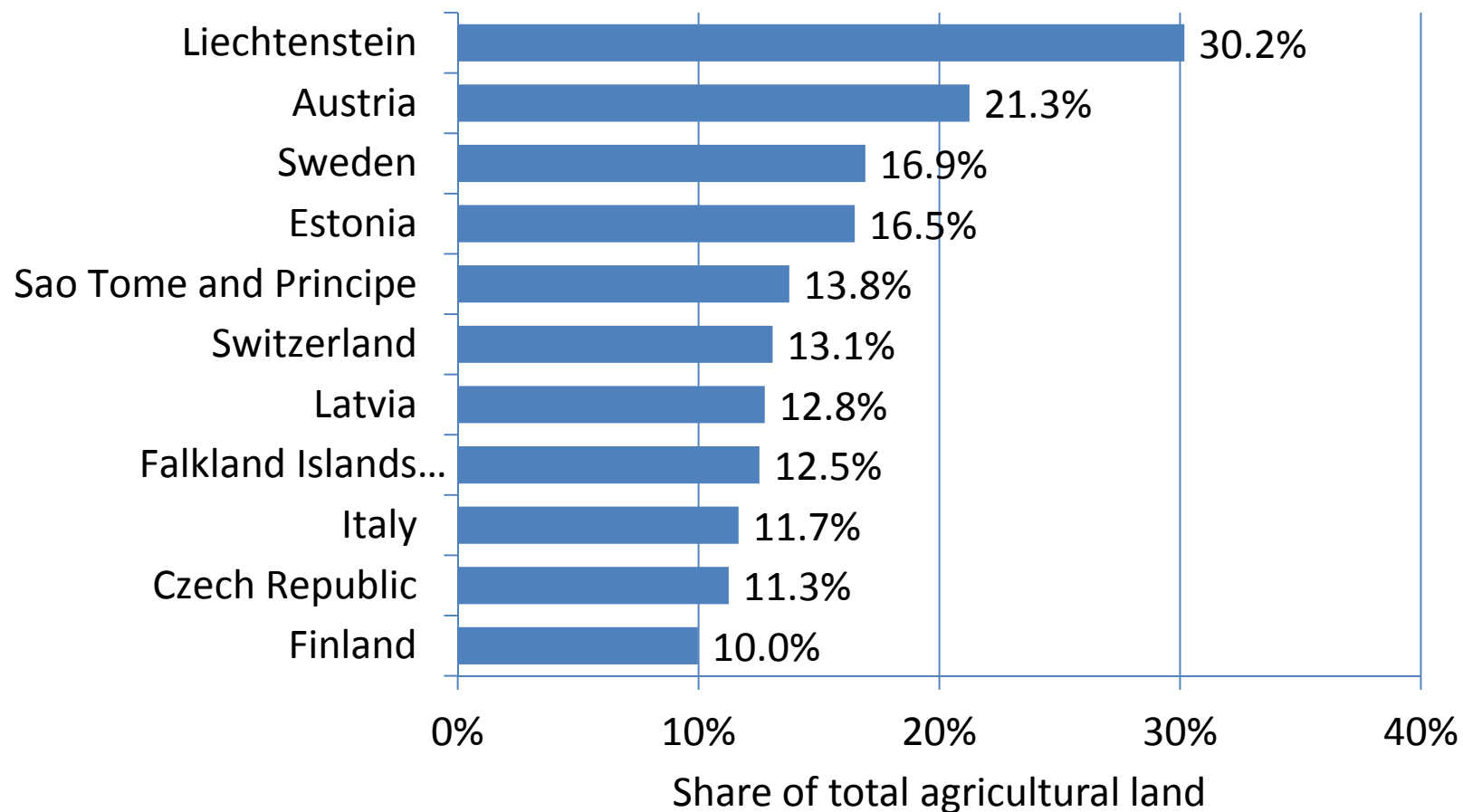
* Total includes correction value for French overseas departments.

(European Union: 6.2 %)

World: The highest shares of organic agricultural land 2015

Countries with organic shares of at least 10 percent 2015

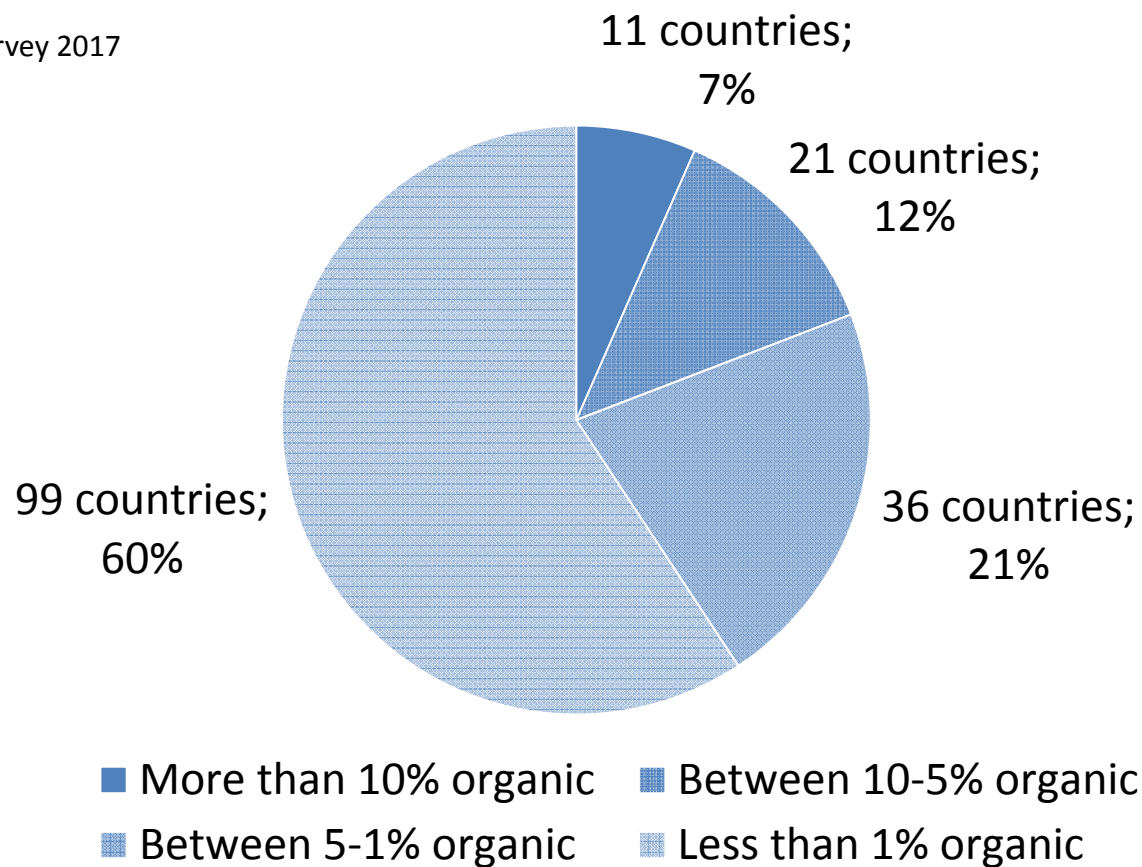
Source: FiBL survey 2017



World: Distribution of organic shares 2015

Distribution of the organic shares of the agricultural land 2015

Source: FiBL Survey 2017



World: Growth of the organic agricultural land 2015

- › Compared with the revised data from 2014, the organic agricultural land has increased by 15 percent in 2015, 6.5 million hectares.
- › This increase is mainly due to the fact that 4.4 million additional hectares were reported from Australia. However, many other countries reported an important increase thus contributing to the global increase of the organic land, like the United States (30 percent) and India (64 percent increase), both with an additional 0.5 million hectares, and Spain and France, both with an additional 0.3 million hectares.
- › Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has almost five-fold.
- › Ninety-eight countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 32 countries. In 35 countries, the organic agricultural area either did not change or no new data was received.

World: Growth of the organic agricultural land by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2014-2015

Region	Organic agr. land [ha] 2014	Organic agr. land [ha] 2015	1 year growth [ha]	10 years growth [ha]
Africa	1'260'619	1'683'482	+422'863	+1'012'844
Asia	3'567'578	3'965'289	+397'711	+965'736
Europe	11'757'176	12'716'969	+959'793	+5'403'552
Latin America	6'830'577	6'744'722	-85'855	+1'795'194
North America	2'458'466	2'973'886	+515'420	+1'181'314
Oceania	18'532'416	22'838'513	+4'306'098	+10'406'693
Total*	44'403'835	50'919'006	+6'515'171	+20'761'478

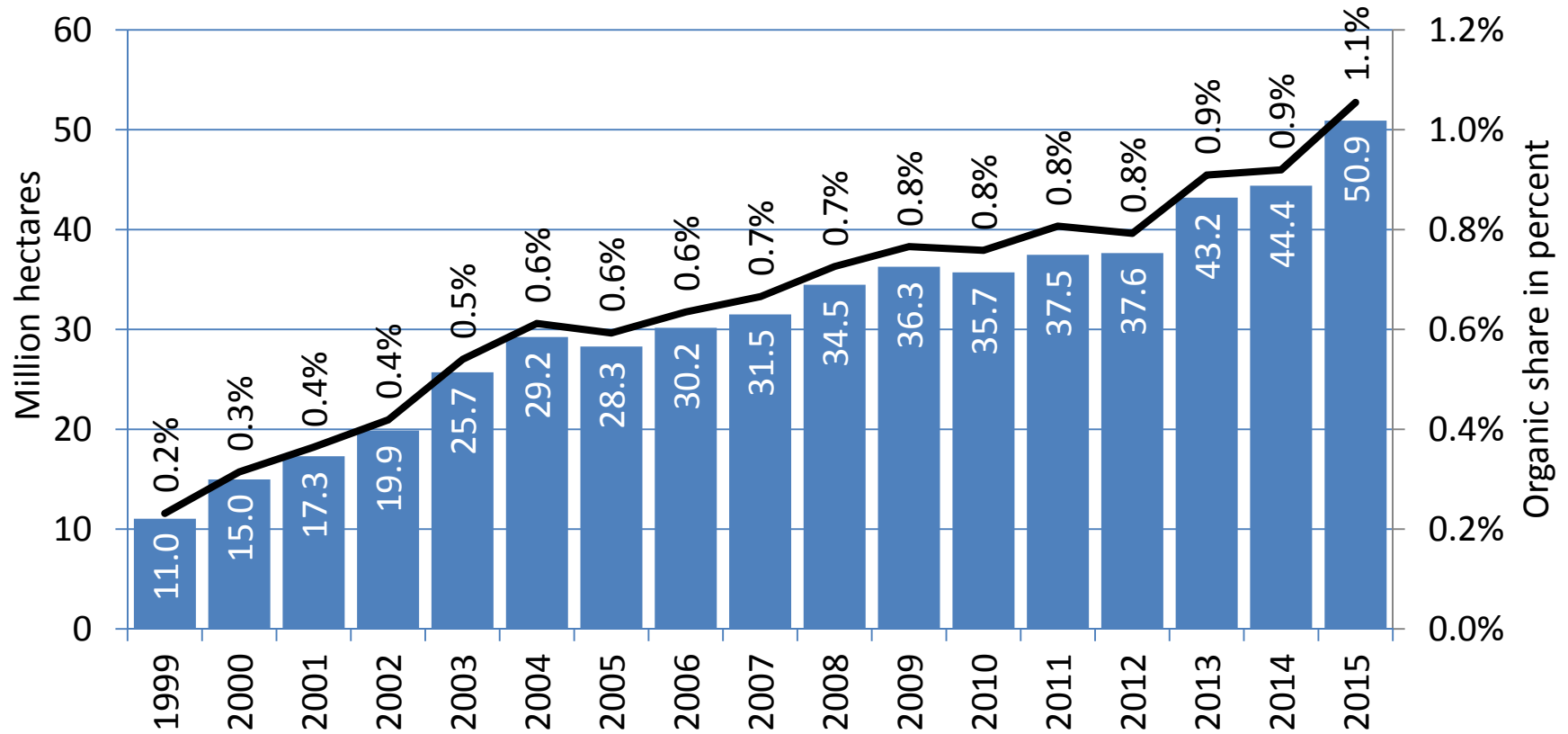
Source: FiBL survey 2017, based on data from government bodies, the private sector, and certifiers.
For detailed data sources see annex, page 316

* Total includes correction value for French Overseas Departments.

World: Growth of the organic farmland and organic share 1999-2015

Growth of the organic agricultural land and organic share 1999-2015

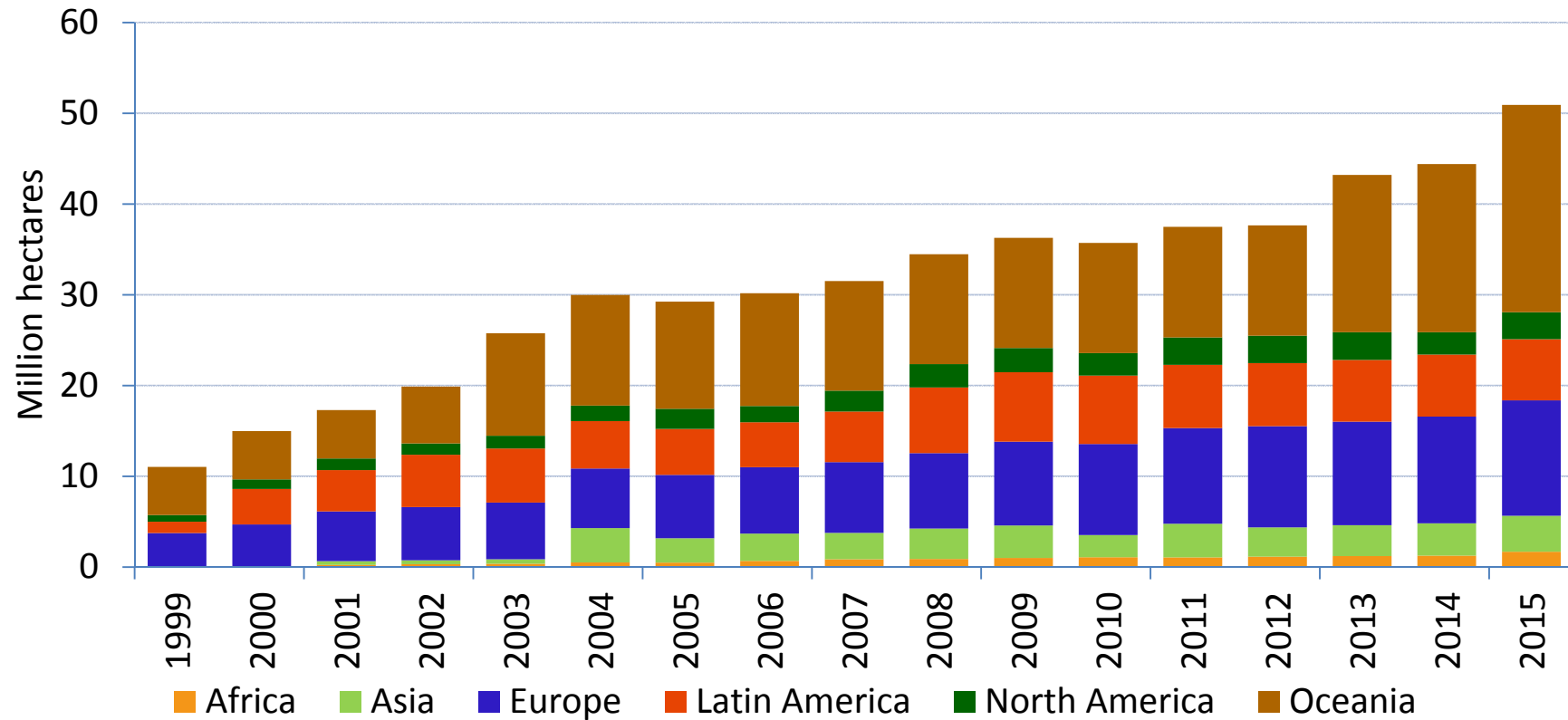
Source: FiBL-IFOAM-SOEL-Surveys 1999-2017



World: Development of organic agricultural land in the regions 2015

Development of organic agricultural land in the regions 1999-2015

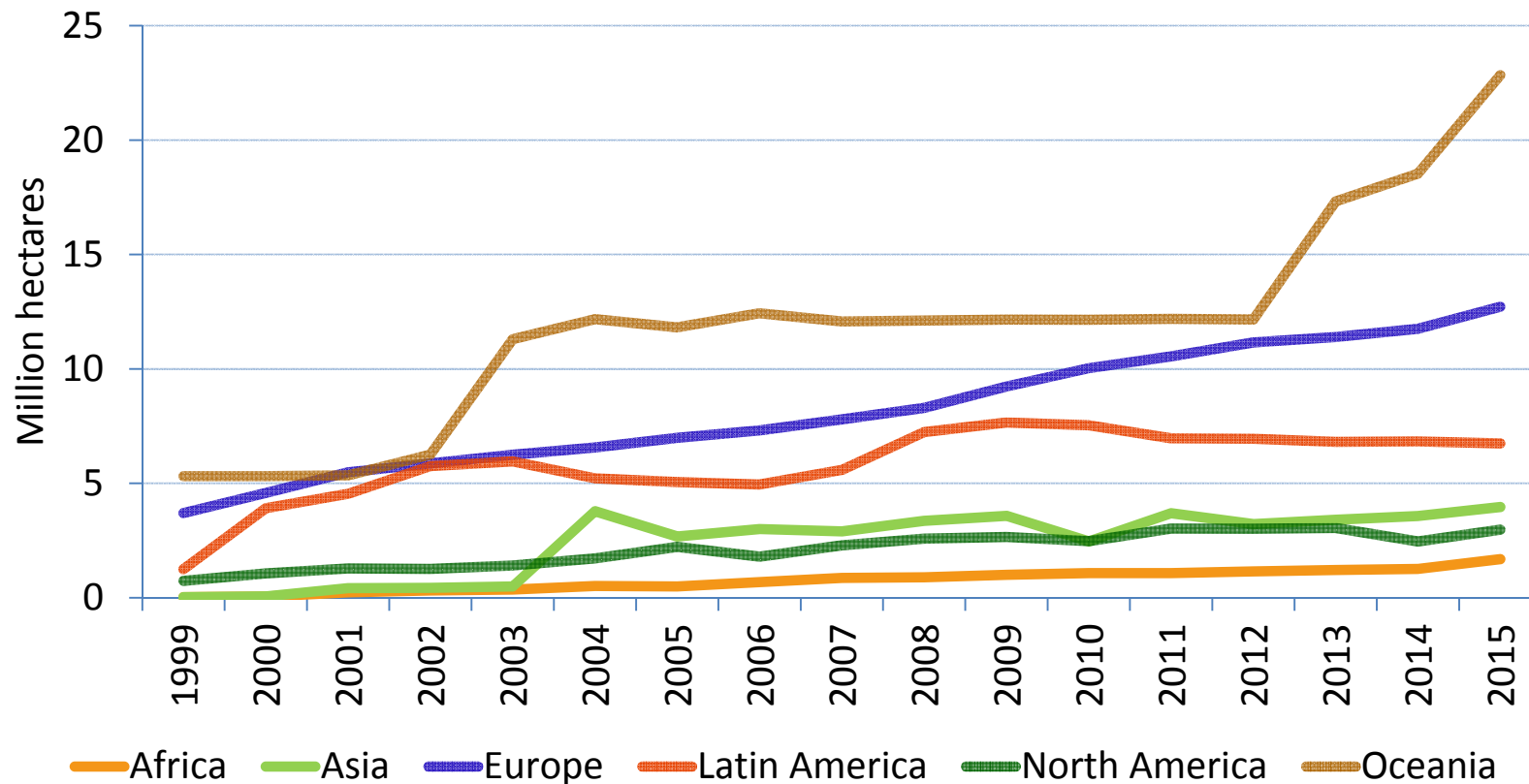
Source: FiBL-IFOAM-SOEL-Surveys 1999-2017



World: Growth of organic agricultural land by region 2015

Growth of the organic agricultural land by continent 1999-2015

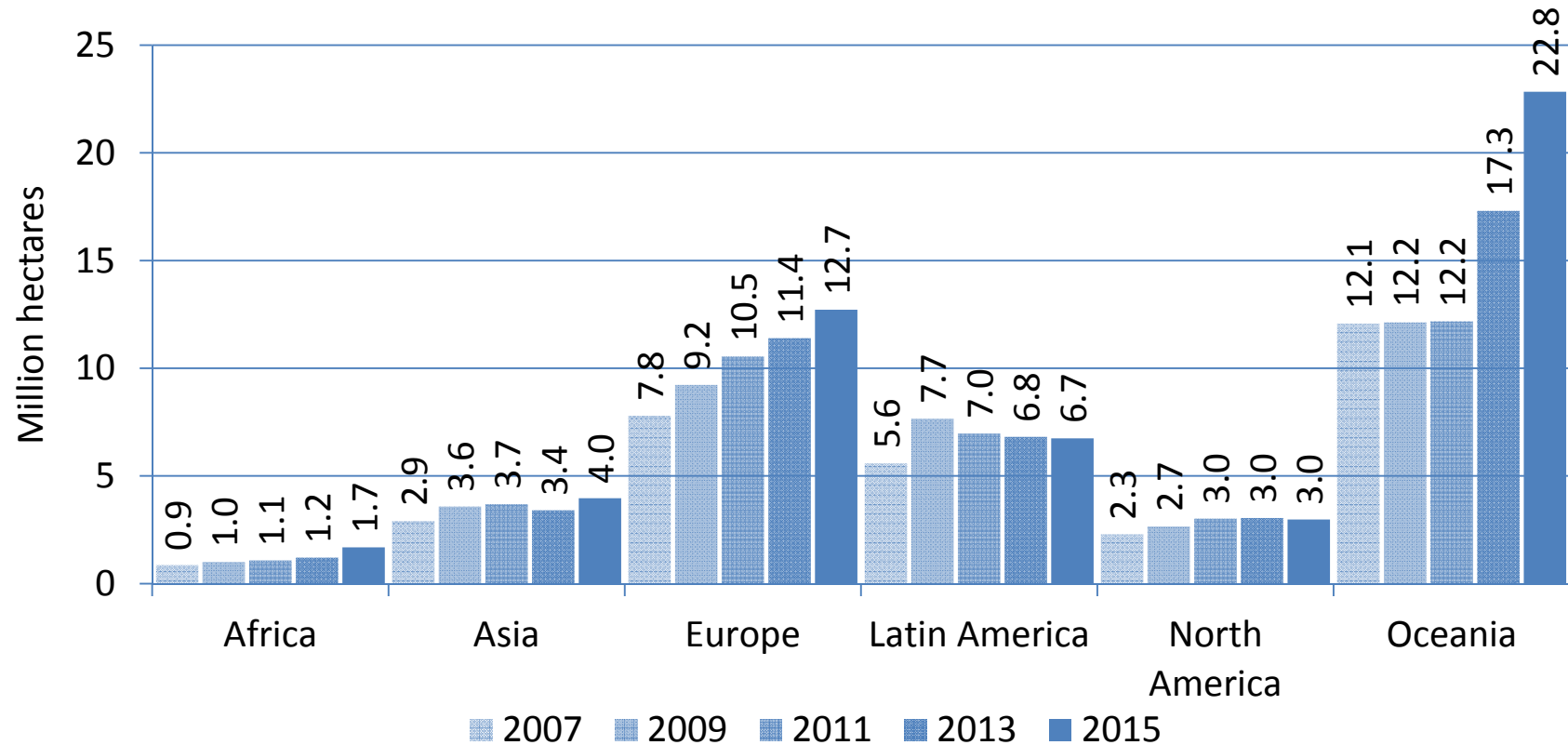
Source: FiBL-IFOAM-SOEL-Surveys 1999-2017



World: Growth of organic farmland by continent 2015

Growth of the organic agricultural land by continent 2006-2015

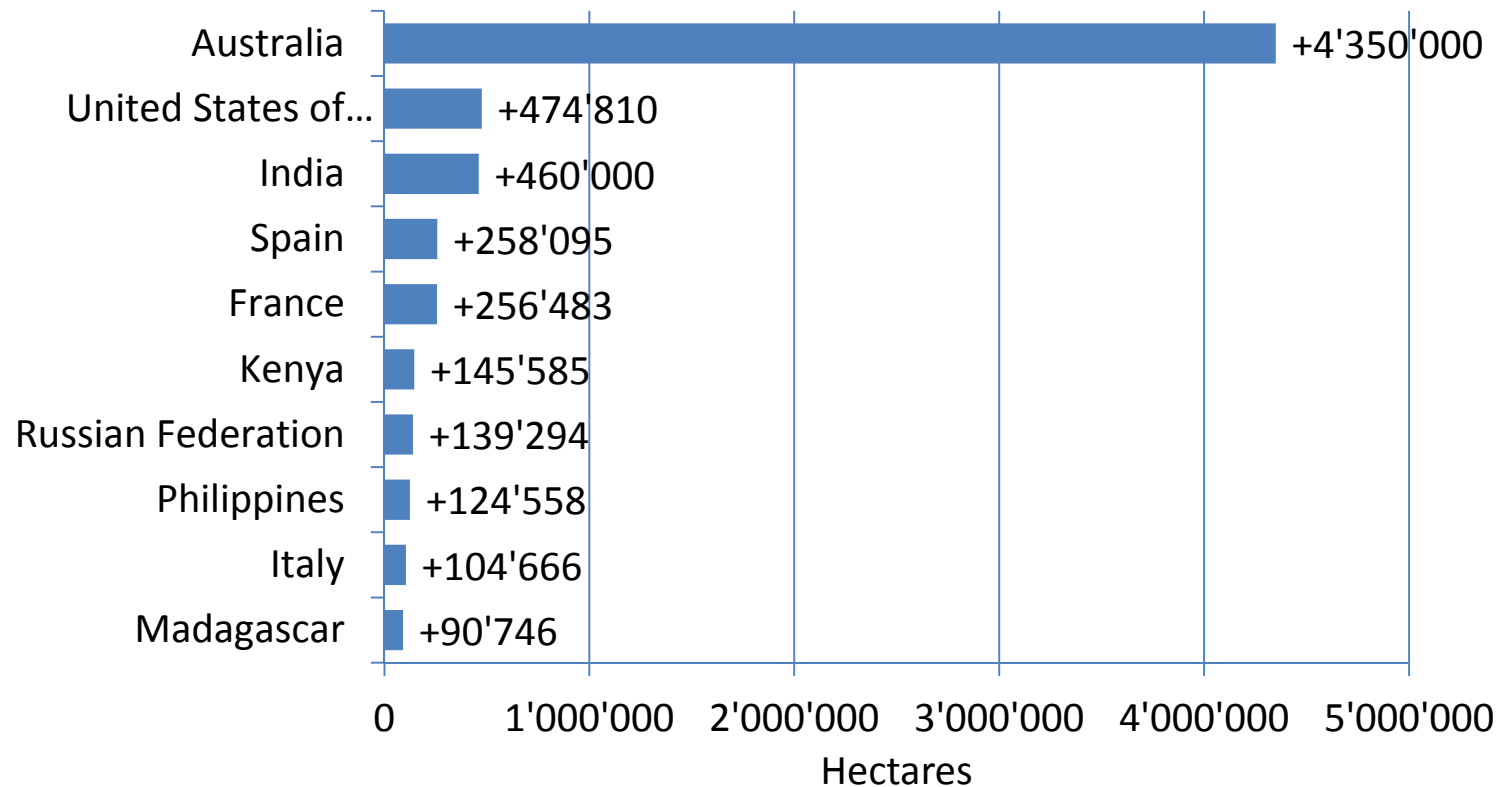
Source: FiBL-IFOAM survey 2008-2017



World: Growth of organic farmland 2014-2015

The ten countries with the highest increase of organic land 2015

Source: FiBL survey 2017



World: 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 39.7 million hectares.
- › In total, 90.6 million hectares – agricultural land and other areas – were organic in 2015.

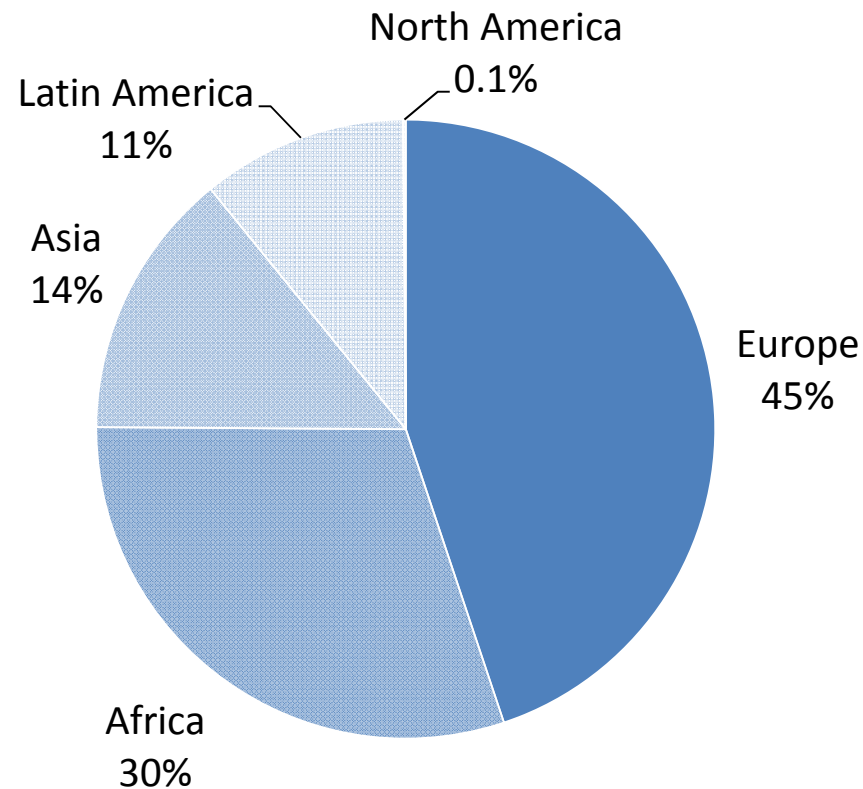
World: Wild collection and beekeeping areas

- › 39.4 million hectares of wild collection and bee-keeping areas were reported for 2015.
- › 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.

World: Wild collection areas by region 2015

Distribution of organic wild collection areas by region 2015

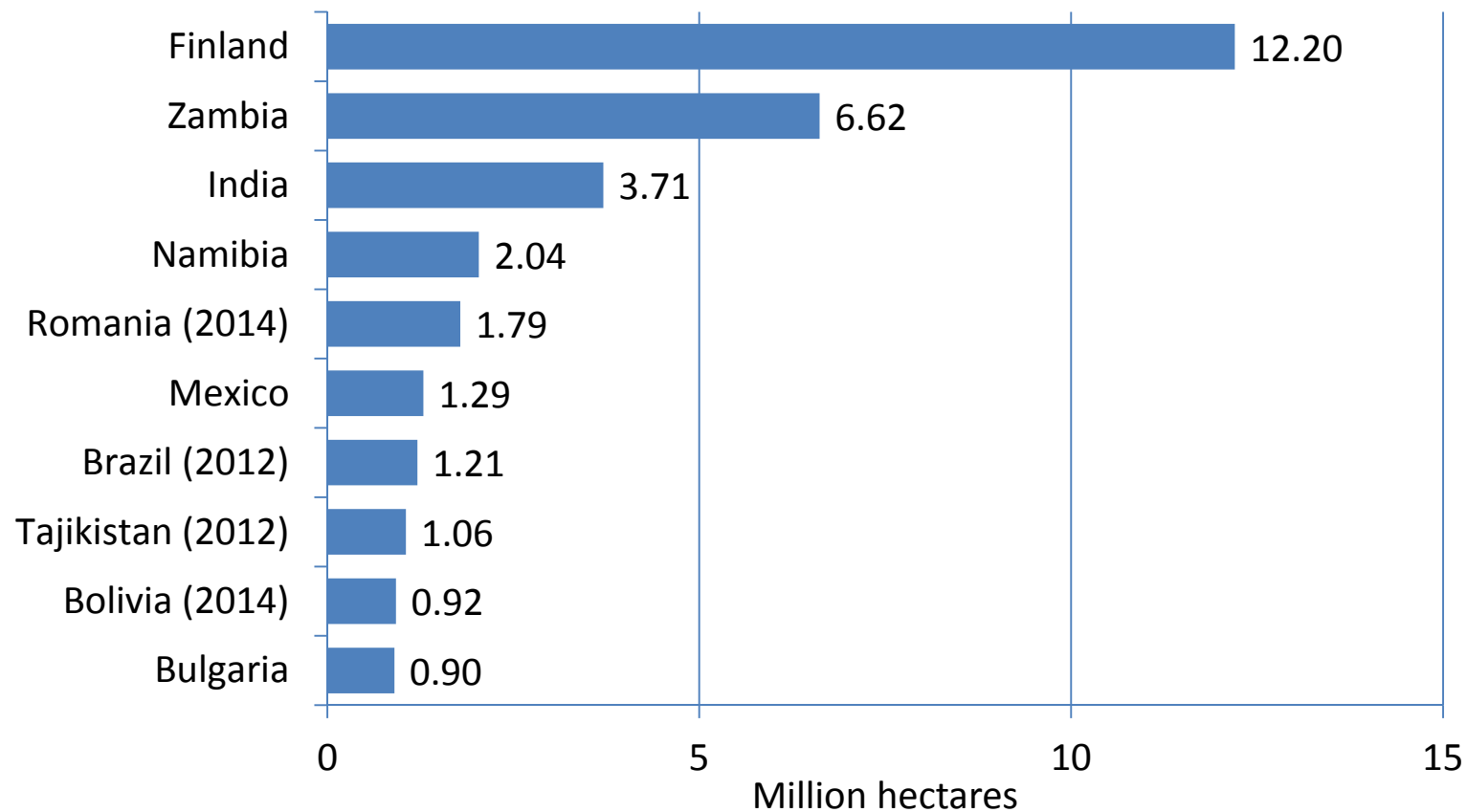
Source: FiBL survey 2017



World: Organic wild collection 2015: Top 10 countries

The ten countries with the largest wild collection areas 2015

Source: FiBL survey 2017



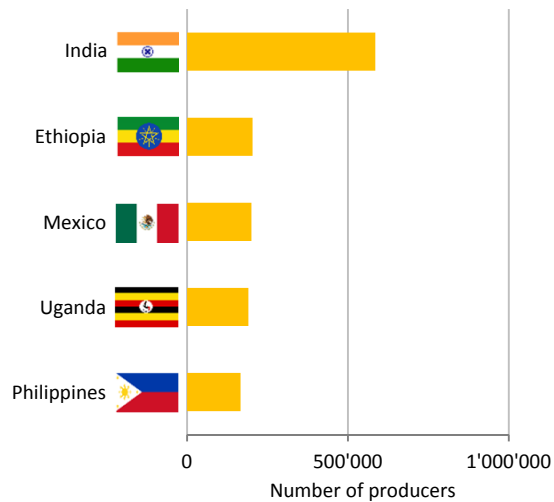
World: Organic producers 2015

- › For the current survey, a total of 2.4 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 (585'200), followed by Ethiopia (203'602) and Mexico (200'039).
- › This is an increase of more than 162'000 producers compared with 2014, or 7 percent.
- › It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2.4 million.

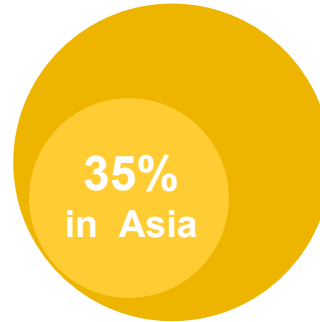
WORLD: ORGANIC PRODUCERS 2015



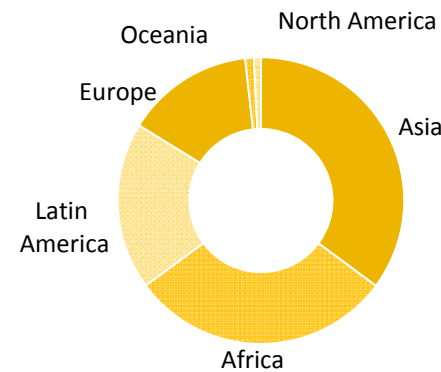
The country with the most organic producers is India, followed by Ethiopia and Mexico.



The five countries with the largest numbers of organic producers 2015



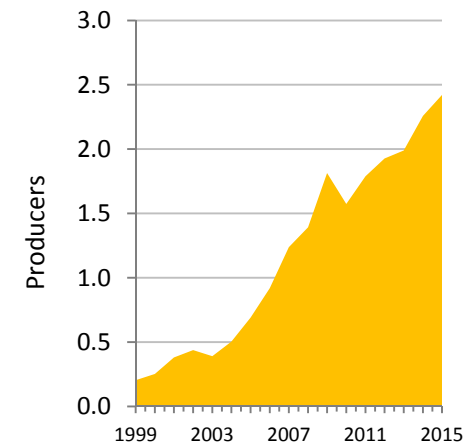
More than 84% of the producers are in Asia, Africa, and Latin America.



Distribution of organic producers by region 2015



There has been an increase in the number of producers by more than 160'000, or over 7% since 2014.

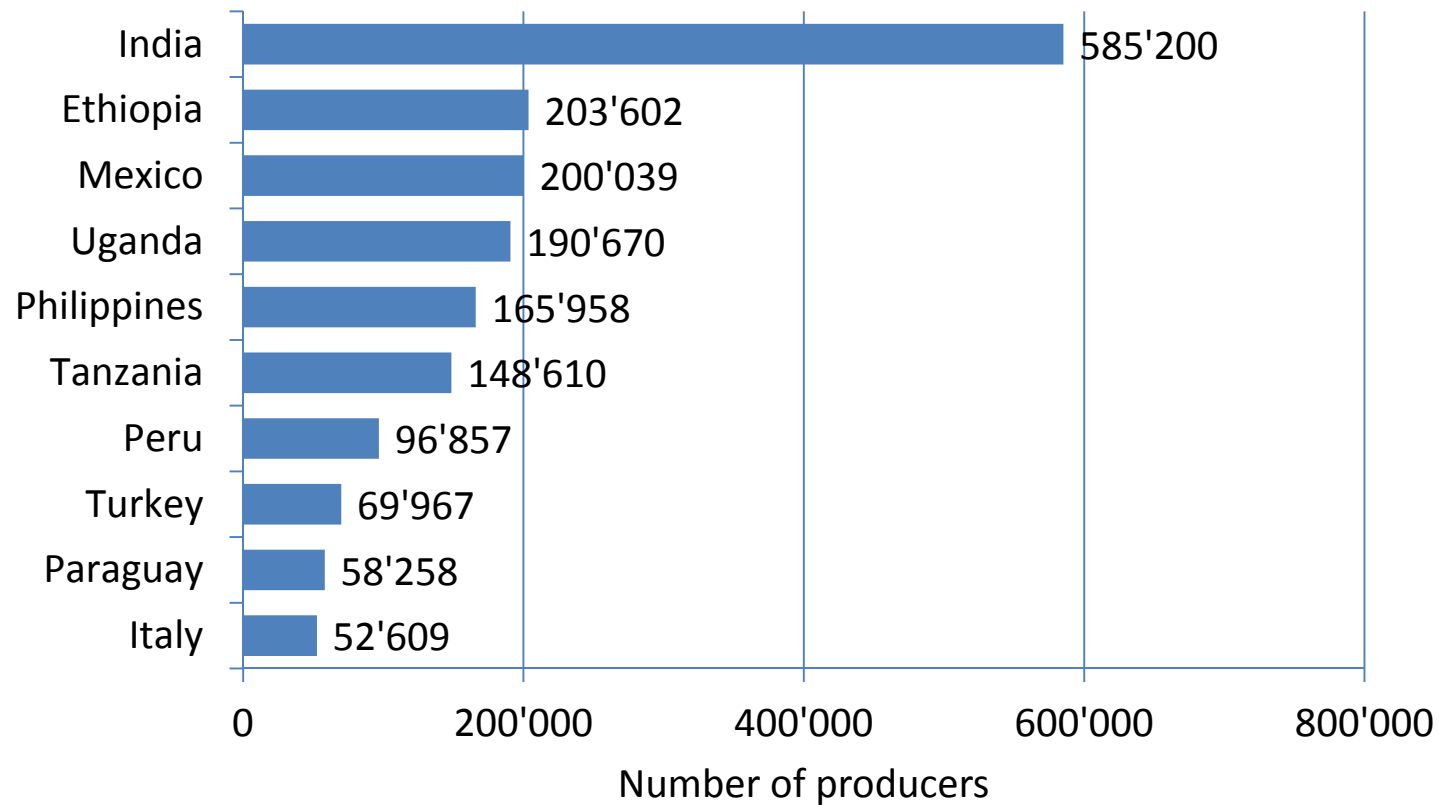


Development of the number of organic producers 1999-2015

World: Organic producers 2015

The ten countries with the largest numbers of organic producers 2015

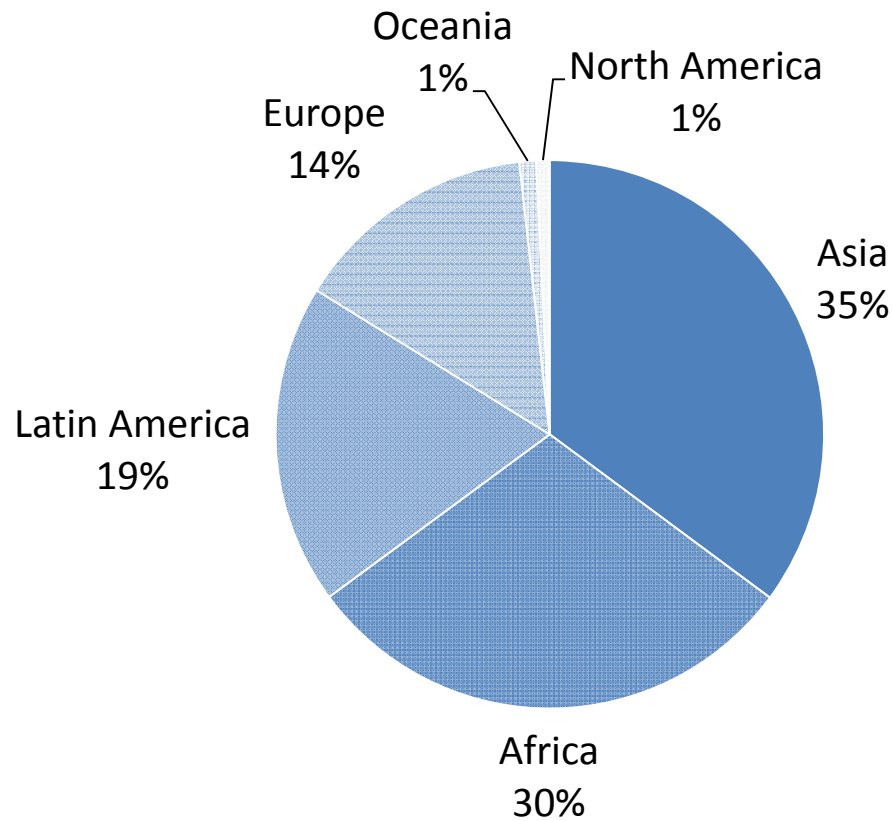
Source: FiBL survey 2017



World: Organic producers by region 2015

Distribution of organic producers by region 2015

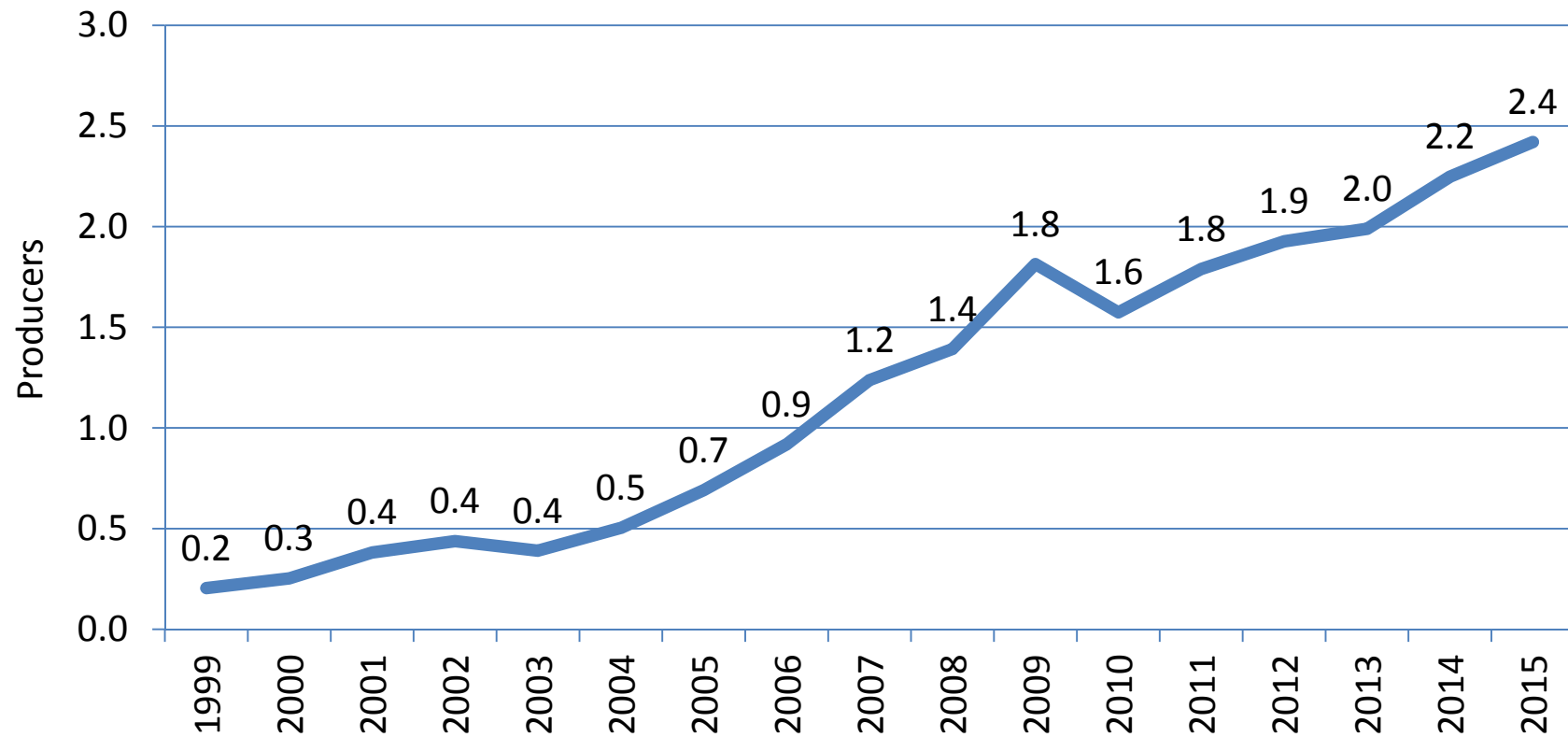
Source: FiBL Survey 2017



World: Development of organic producers 1999-2015

Development of the number of organic producers 1999-2015

Source: FiBL-IFOAM-SOEL-Surveys 1999-2017



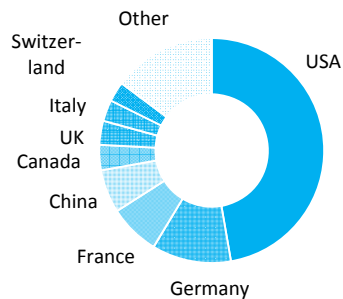
World: The global market for organic food and beverages 2015

- › In 2015, the global market for certified organic food and drink was estimated to be 81.6 billion US Dollars according to Organic Monitor (Sahota 2017).
- › The turnover with organic products has more than threefold since 2000.
- › Ninety percent of the organic product revenues is made in the North America and Europe.
- › In 2015, the by far largest market was the United States with 35.8 billion euros of organic food sales, followed by Germany with 8.6 billion euros and France with 5.5 billion euros (FiBL-AMI survey 2017).
- › The highest annual per capita consumption was in Switzerland (262 euros) and in Denmark (191 euros) (FiBL-AMI survey 2017).
- › Denmark, Switzerland and Luxembourg have the highest share of organic food sales. In 2015 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.

WORLD: ORGANIC RETAIL SALES 2015



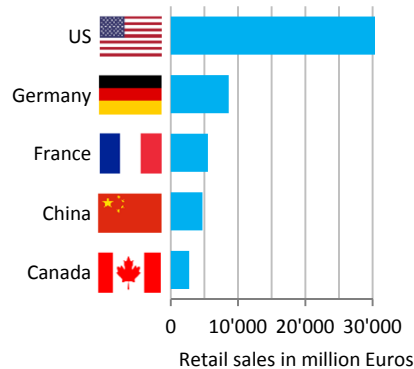
The largest single market is the USA followed by the EU (27.1 billion €) and China. By region, North America has the lead (38.5 billion €), followed by Europe (29.8 billion €) and Asia.



Distribution of retail sales value by country 2015



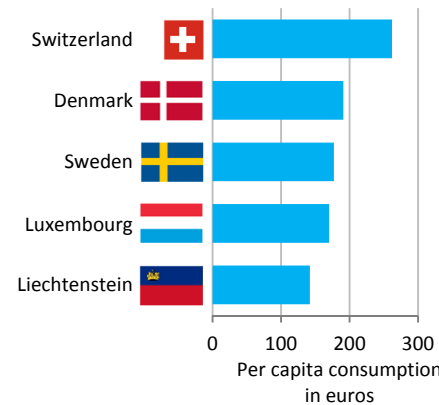
The countries with the largest market for organic food are the United States (35.8 billion €), followed by Germany (8.6 billion €), France (5.5 billion €) and China (4.7 billion €).



The five countries with the largest markets for organic food 2015



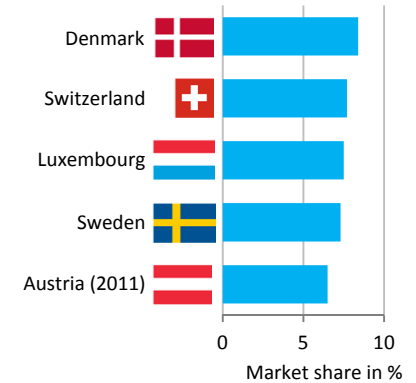
Switzerland has the highest per capita consumption worldwide, followed by Denmark and Sweden.



The five countries with the highest per capita consumption 2015



The highest shares the organic market of the total market is in Denmark, followed by Switzerland, Luxembourg, Sweden, and Austria.

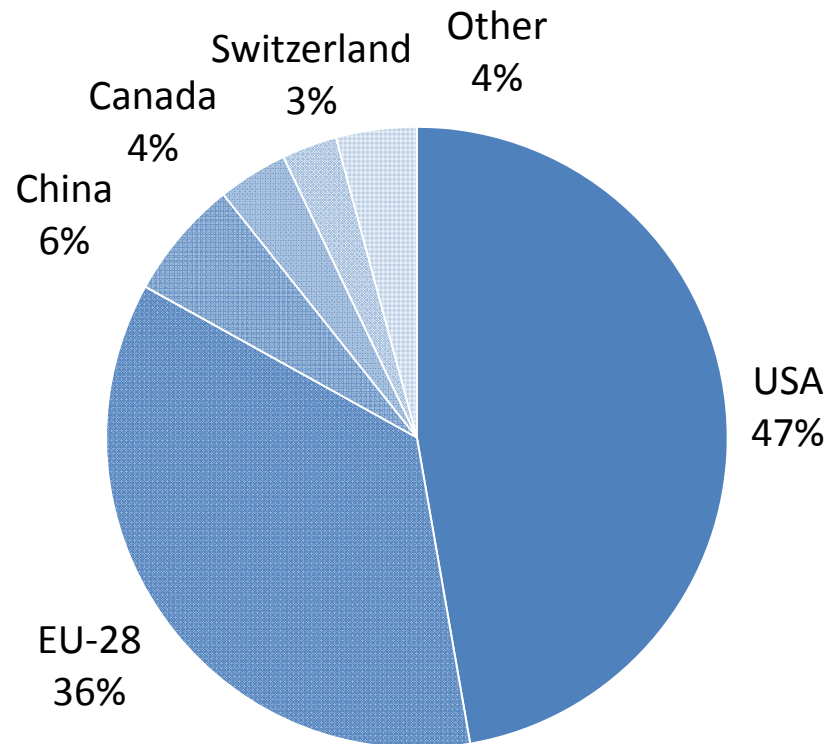


The five countries with the highest organic shares of the total market 2015

World: Global market: Distribution of retail sales by single market 2015

World: distribution of retail sales by single market 2015

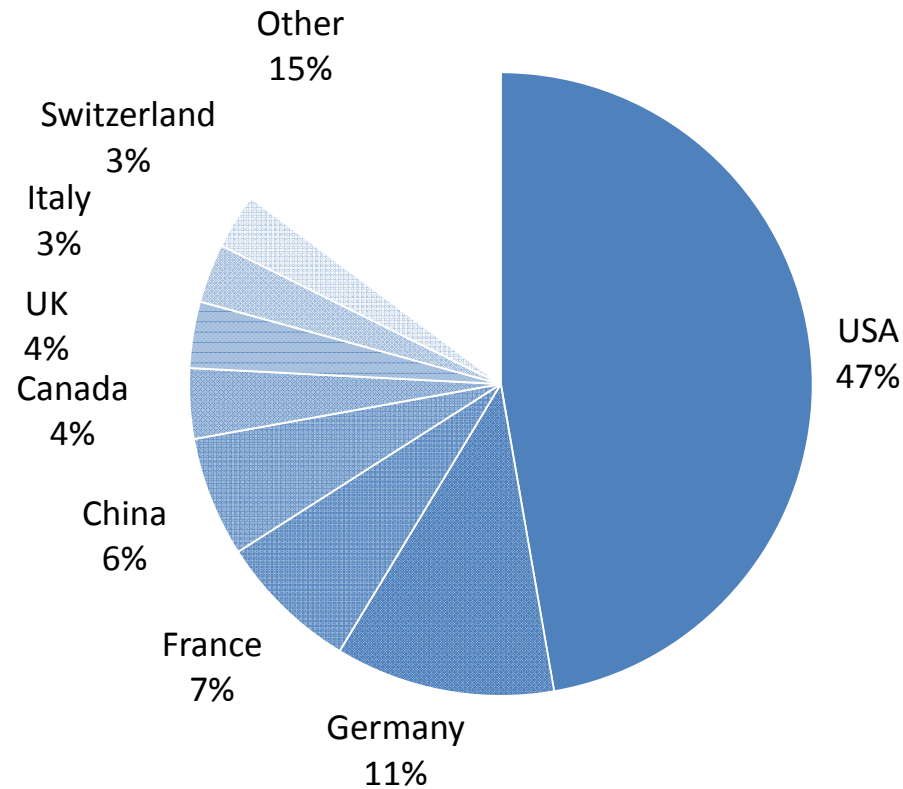
Source: FiBL-AMI survey 2017



World: Distribution of organic retail sales 2015

Global market: Distribution of retail sales value by country 2015

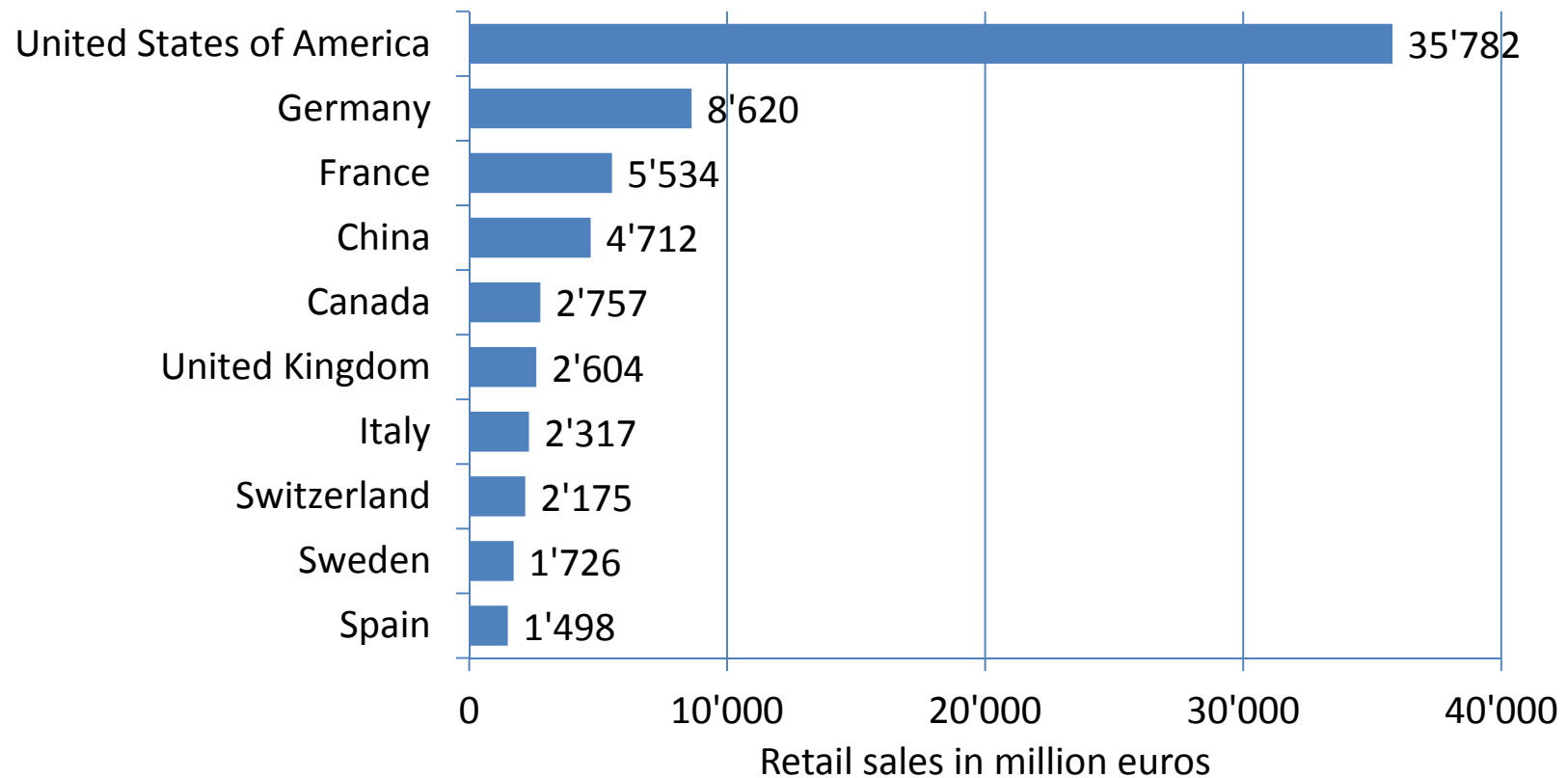
Source: FiBL-AMI survey 2017, based on retail sales with organic food



World: The largest markets for organic food 2015

The ten countries with the largest markets for organic food 2015

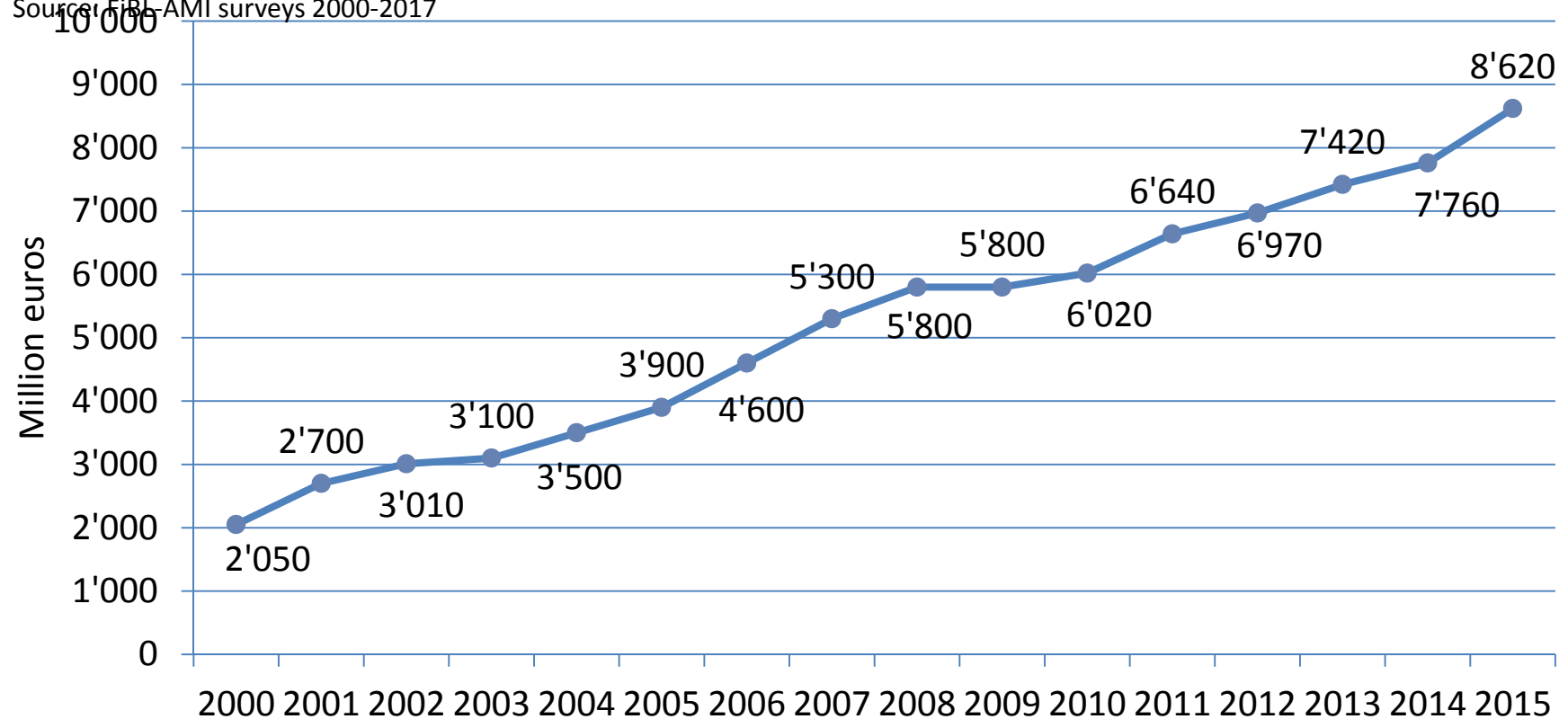
Source: FiBL-AMI survey 2017



Germany: Growth of retail sales in Germany 2000-2015

Germany: Growth of organic food and beverages retail sales 2000-2015

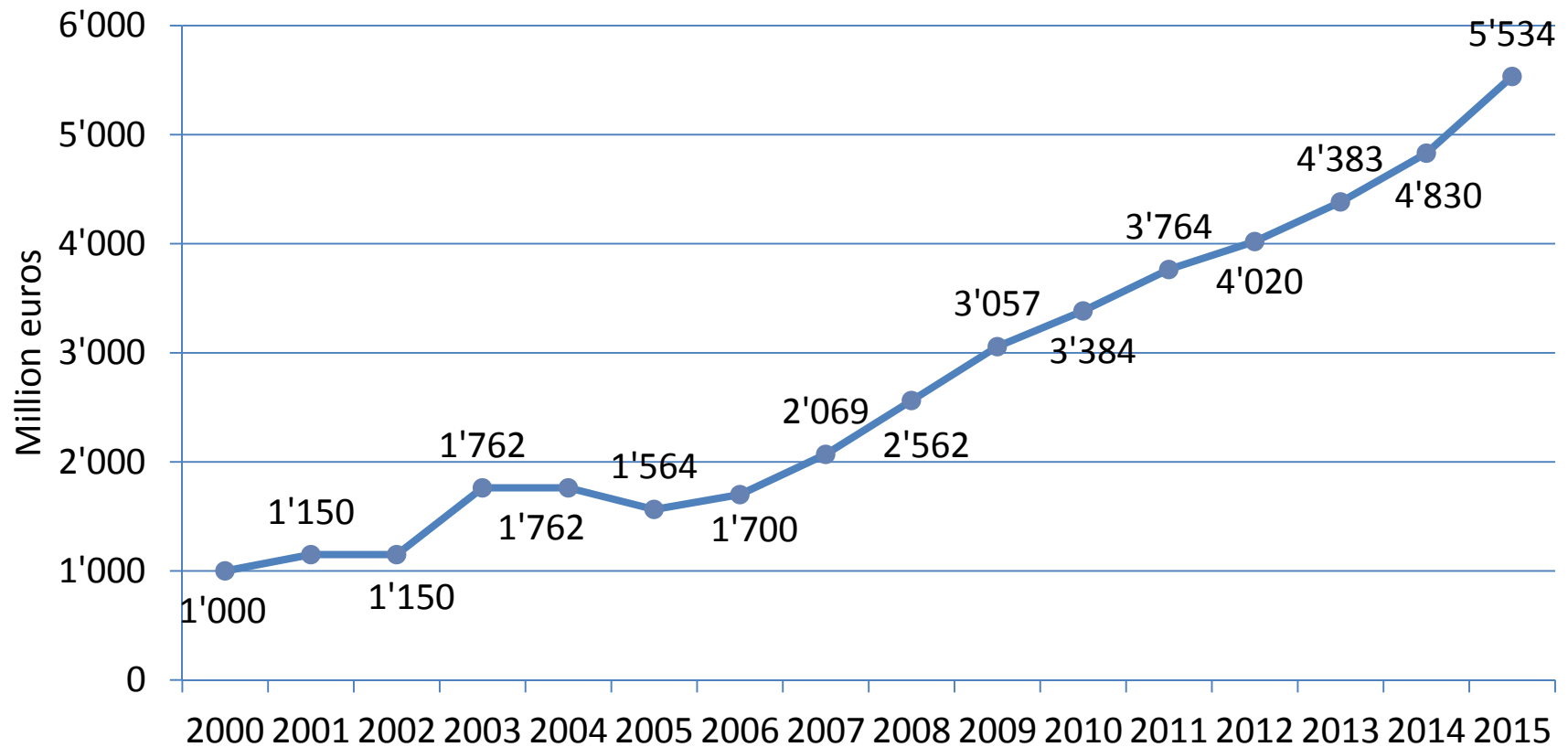
Source: FiBL-AMI surveys 2000-2017



France: Growth of retail sales in France 2000-2015

France: Growth of organic food and beverages retail sales 2000-2015

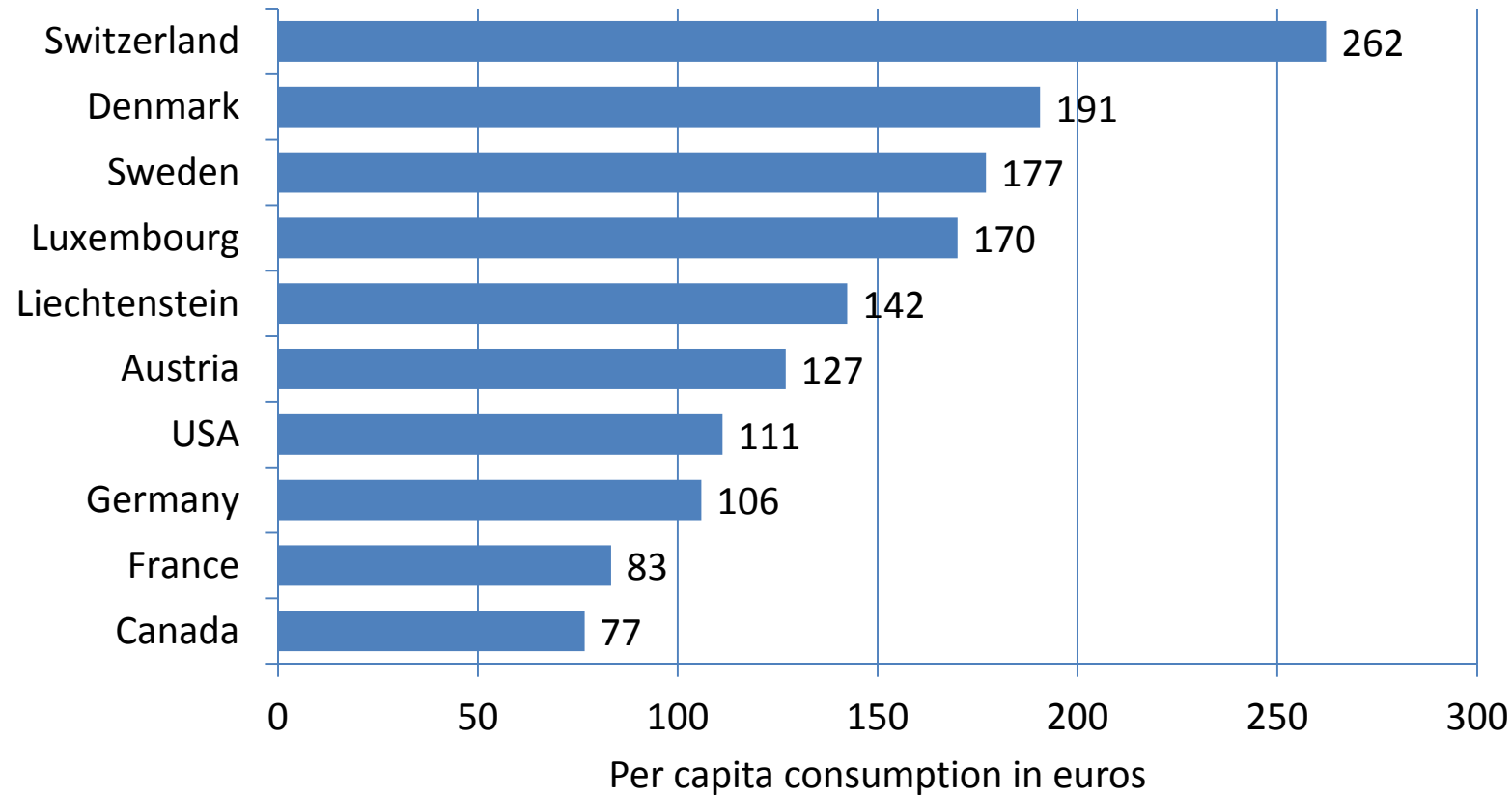
Source: FiBL-AMI surveys 2000-2017



World: Per capita consumption 2015

The ten countries with the highest per capita consumption 2015

Source: FiBL-AMI survey 2017



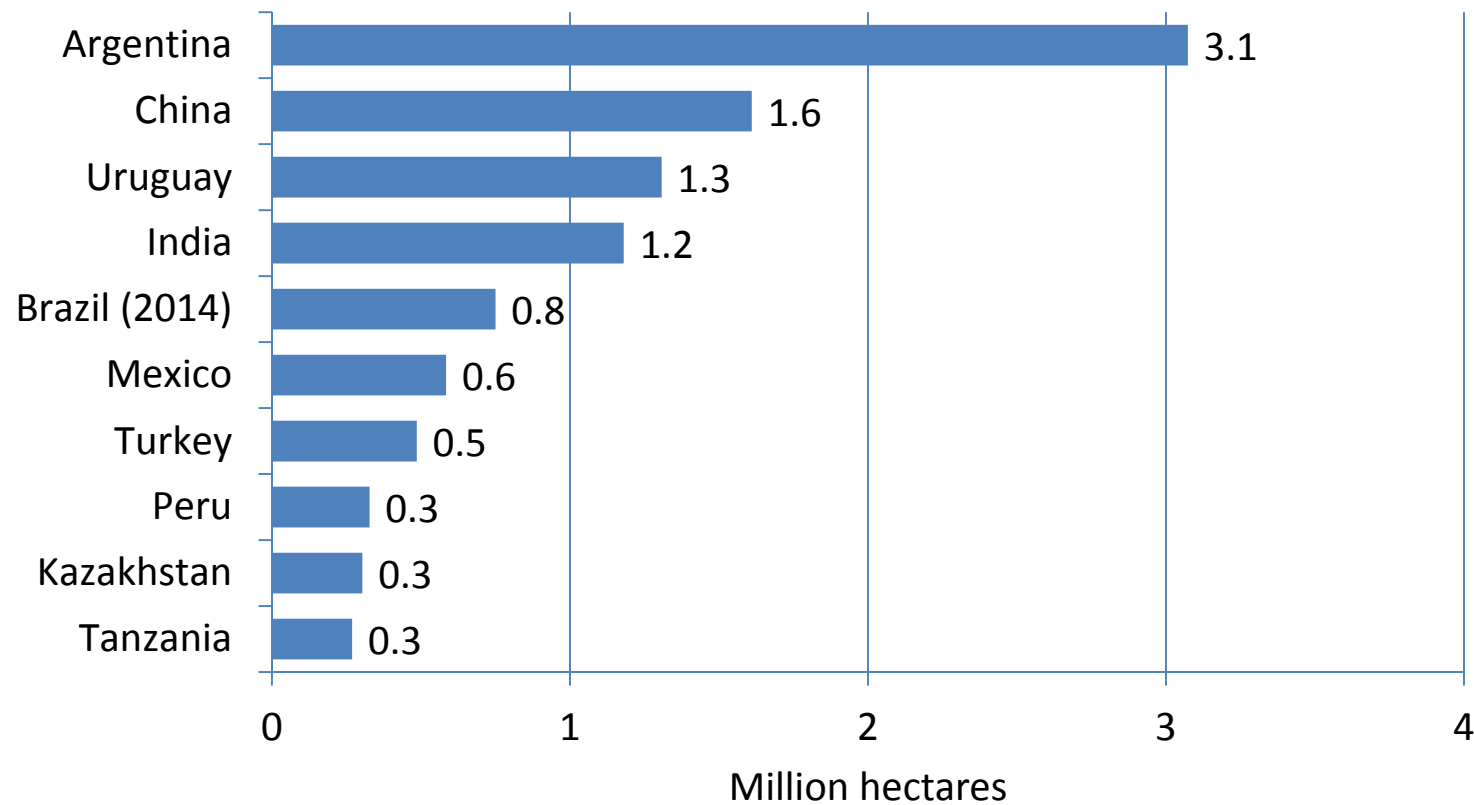
World: Organic farming in developing and transition countries 2015

- › Almost a quarter of the world's organic agricultural land – 11.7 million hectares - is located in developing/transition countries and in emerging markets.* Most of this land is in Latin American countries, with Asia and Africa in second and third place.
- › 1.9 million producers are in these countries.
- › *Countries listed in the List of Recipients of Official Development Assistance (ODA) of the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD). The list is available at <https://www.oecd.org/dac/stats/documentupload/DAC%20List%20of%20ODA%20Recipients%202014%20final.pdf>

World: DAC list: The top 10 countries with the largest areas of organic agricultural land 2015

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

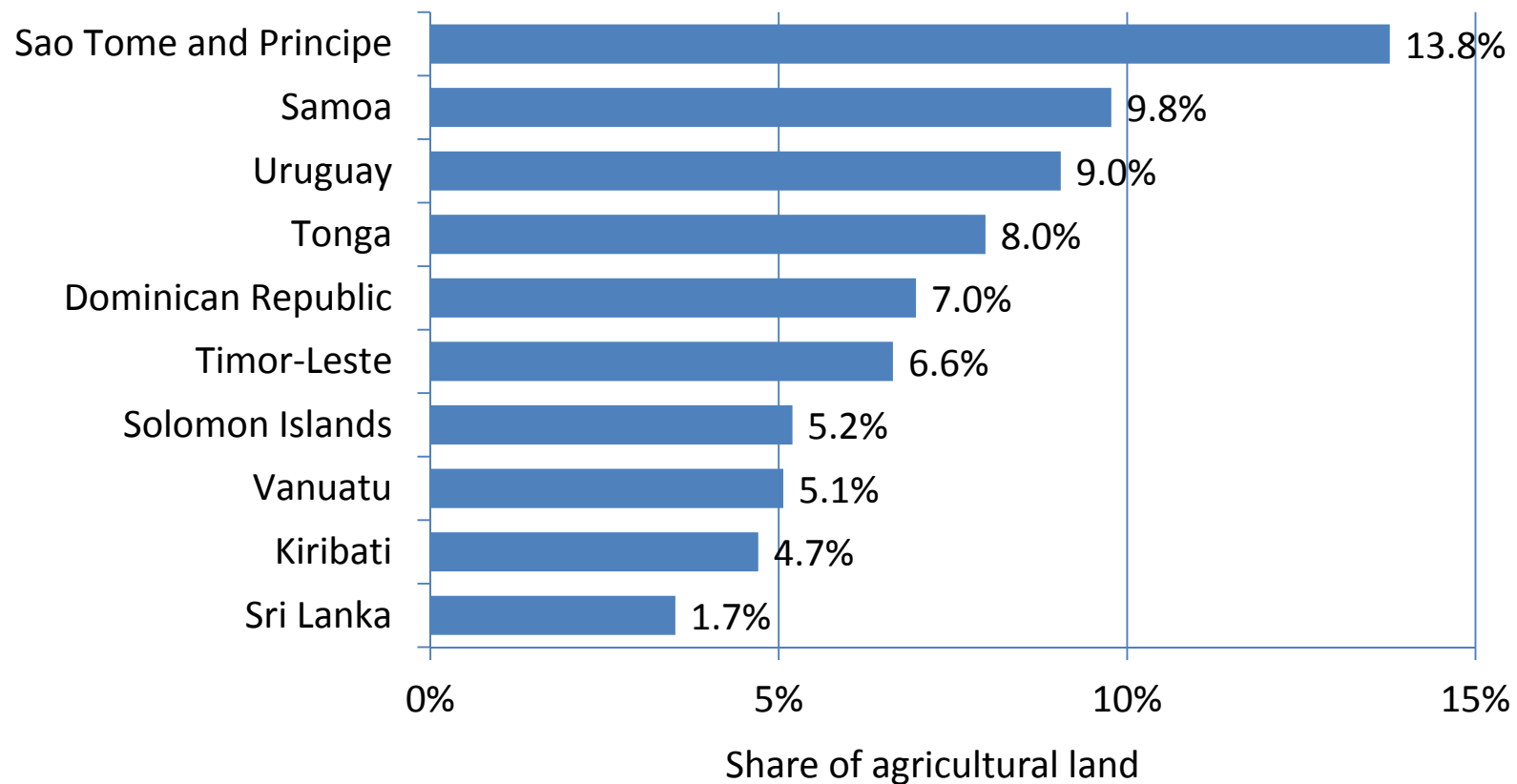
Source: FiBL survey 2017



World: DAC list: The top 10 countries with the highest shares of organic agricultural land 2015

The ten countries on the DAC list with the highest organic shares of the total agricultural land 2015

Source: FiBL survey 2017



More information

- › More information (PDF, data sources, graphs) at <http://www.organic-world.net/yearbook/yearbook-2017.html>
- › Contact
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