



THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2006

AUSTRALIA / OCEANIA 12,2 MILLION HA

ASIA 4,1 MILLION HA

AFRICA 1,0 MILLION HA

EUROPE 6,5 MILLION HA

LATIN AMERICA 6,4 MILLION HA

NORTH AMERICA 1,4 MILLION HA





**THE
WORLD OF
ORGANIC AGRICULTURE**

STATISTICS & EMERGING TRENDS 2006

All of the statements, results etc. contained in this book have been compiled by the authors according to their best knowledge and have been scrupulously checked by the Research Institute of Organic Agriculture (FiBL), the Foundation Ecology & Agriculture (SOEL) and the International Federation of Organic Agriculture Movements (IFOAM). However, the possibility of mistakes cannot be ruled out entirely. Therefore, the editors and the authors are not subject to any obligation and make no guarantees whatsoever regarding any of the statements etc. in this work; neither do they accept responsibility or liability for any possible mistakes contained therein.

Additional information (links, graphs) is available from the internet at www.soel.de/oekolandbau/weltweit.html. Information about organic farming around the globe is provided at www.ifoam.org.

Should corrections and updates of this report become necessary, they will be published at www.organic-europe.net.

WILLER, HELGA AND MINOU YUSSEFI (2006):

The World of Organic Agriculture. Statistics and Emerging Trends 2006.

International Federation of Organic Agriculture Movements (IFOAM), Bonn Germany &
Research Institute of Organic Agriculture FiBL, Frick, Switzerland

ISBN IFOAM: 3-934055—61-3

ISBN-10: 3-906081-81-8; ISBN-13: 978-3-906081-81-6

© 2006, International Federation of Organic Agriculture Movements (IFOAM) &
Research Institute of Organic Agriculture (FiBL)

Cover and Layout: Sibeth Entertainment GmbH, www.sibeth.de

Technical & Language Editing: Neil Sorensen, IFOAM, Bonn Germany

Printed on recycled paper by Medienhaus Plump, Rolandsecker Weg 33, 53619 Rheinbreitbach, Germany

Printed copies of this volume may be ordered via the IFOAM website at www.ifoam.org or via the FiBL shop at www.fibl.org/shop/; FiBL-order Number 1402.

Download of the main chapters via the IFOAM Homepage and the FiBL Shop.

Download of the full volume is possible via the IFOAM Homepage and the FiBL shop at a charge of 10,60 EUR.

Price: 16 EUR + postage for the printed copy; 10,60 EUR for the download version.

THE WORLD OF ORGANIC AGRICULTURE STATISTICS & EMERGING TRENDS 2006 TABLE OF CONTENTS

1 Foreword	7
2 Editors' Note	8
3 Contacts and Data Sources BÄRBARA BARAIBAR	9
4 Data Collection and Processing BÄRBARA BARAIBAR	15
5 Organic Farming Worldwide 2006 Overview & Main Statistics MINOU YUSSEFI	23
6 Crop Statistics and Information on Four Main Crops BÄRBARA BARAIBAR and HELGA WILLER	38
7 Crop Information & Statistics BÄRBARA BARAIBAR, SALVADOR GARIBAY, BERNWARD GEIER	52
8 Overview of the Global Market for Organic Food & Drink AMARJIT SAHOTA	69
9 Standards and Regulations LUKAS KILCHER, BEATE HUBER and OTTO SCHMID	74
10 Certification and Accreditation Gerald A. Herrmann, Gunnar Rundgren	84
11 The Contribution of Organic Farming to Sustainable Development LUKAS KILCHER	91
12 Organic Farming in Africa NICHOLAS PARROTT, CHARLES SSEKYEWA, CHIDO MAKUNIKE, SAMUEL MUWANGA NTAMBI	96
13 Organic Farming in Asia ONG KUNG WAI	108
14 Organic Farming in Australia/Oceania ELS WYNEN, SEAGER MASON	118
15 Organic Farming in Europe HELGA WILLER, TORALF RICHTER, SUSANNE PADEL, STEVE LOWMAN, BERNHARD JANSEN	130

16 Organic Farming in Latin America	152
ALBERTO PIPO LERNOUD and MARCELA PIOVANO	
17 Organic Farming in the Mediterranean Region	176
LINA AL-BITAR	
18 Organic Farming in North America	188
BARBARA HAUMANN	
19 Achievements made and challenges ahead	205
ANGELA B. CAUDLE and GABRIELE HOLTMANN	
20 Contact	209
<i>Appendix</i>	210
Countries that Provided Information on Land Use and Crop Categories	

Graphs

Graph 1	Main land uses in organic farming worldwide according to the data collected share (%) of the total global organic area	17
Graph 2	Land use of the certified area worldwide	23
Graph 3	Area of organic agriculture and wild harvested plants worldwide 2000-2006	24
Graph 4	Land area under management The 10 countries with the largest organic area	36
Graph 5	The ten countries with the highest percentage of land area under organic management	36
Graph 6	Area under organic management – share per continent	37
Graph 7	Organic farms – share per continent	37
Graph 8	Arable land by continent (hectares)	42
Graph 9	Permanent crops by continent	42
Graph 10	Permanent pasture by continent	43
Graph 11	Wild collection by continent	44
Graph 12	Distribution of global organic food revenues, 2004	73
Graph 13	Development of organic farming in the European Union 1985-2004. From 2003 the New Member States are included (accession May 2004)	131

Tables

Table 1	Percentage of countries by continents that answered the survey	16
Table 2	Data classification	20
Table 3	Area under organic management by country	28
Table 4	Land under organic management in percent of the total agricultural area by country	31
Table 5	Organic farms worldwide by country	33
Table 6	Main land use categories in organic agriculture global overview	39
Table 7	Main land use categories by continents	40

Table 8	Certified organic agricultural land and area with wild collection by continent	41
Table 9	Main agricultural land use categories by country; data from 2005/2006 survey	45
Table 10	Organic cotton area by country	53
Table 11	Organic coffee area by country	56
Table 12	Organic cocoa area by country	60
Table 13	Organic grape area by country	63
Table 14	Organic citrus area by country	66
Table 15	Organic olive area by country	67
Table 16	Organic rice area by country	68
Table 17	Countries with a fully implemented regulation (43)	77
Table 18	Countries with a finalized regulation – not yet fully implemented (12)	79
Table 19	Countries in the process of drafting regulations (16)	79
Table 20	Number of certification bodies per continent 2003 - 2005	86
Table 21	Number of certification bodies per country (the 10 main countries)	87
Table 22	Starting year of certification bodies	87
Table 23	Number of certification bodies per accreditation system 2003 - 2005	88
Table 24	Organic produce from Africa (by type and country) Organic produce from Africa (by type and country)	99
Table 25	Africa Land under organic management and organic farms	105
Table 26	Africa Main land use categories in organic farming	106
Table 27	Asia Land under organic management and organic farms	115
Table 28	Asia Main land use categories	116
Table 29	Australia / Oceania Land under organic management and organic farms	129
Table 30	Europe Main land use categories	132
Table 31	Estimated turnover and per capita consumer expenditures for organic food in selected European countries, 2004	143
Table 32	Europe Land under organic management and organic farms	146
Table 34	Europe Permanent cropland by crop category	148
Table 35	European Union Main land use categories and main crop categories 2004 / 2005	148
Table 36	Latin America Land under organic management and organic farms	172
Table 37	Latin America Main land use categories	173
Table 38	Latin America Arable land by crop category	173
Table 39	North America Land under organic management and organic farms	203
Table 40	North America Main land use categories	203
Table 41	North America Arable land by crop category	203

Maps

Map 1	Organic farming in Africa.	96
Map 2	Organic Farming in Asia.	108
Map 3	Organic farming in Australia / Oceania	118
Map 4	Organic farming in Europe.	130
Map 5	Organic farming in Latin America.	152

7.4 *Organic grapes ... More Than Wine and Statistics*

BERNWARD GEIER¹⁰

Wine plays an outstanding role as “ambassador” of organic quality. Given the rapidly growing importance of the organic wine sector, it is appropriate and timely to devote a special chapter to this crop.

Searching for reliable organic data and statistics is quite a challenging task, which seems to be even paramount when it gets to organic grapes and wine. Helga Willer from the FiBL, the Research Institute of Organic Agriculture, supported by Bärbara Baraibar worked hard and dedicated to get the data, which are presented in this chapter.

The roots and quality achievements

Viticulture and grape growing was among the crops that were converted early to the chemical treadmill, which subsequently caused an early development of organic and biodynamic alternatives dating back to the 1950s.

Only since the 1980s public research has supported the increasing in organic grape and wine production.

A solid growth of the sector started in the nineties and continues dynamically up to today.

For the pioneers in the first decades, the focus was clearly on finding and practicing alternatives to the use of chemical-synthetic fertilizers and pesticides. The consequence of this concentration on environmental aspects – so to say from a healthy soil to healthy grapes - was that often less attention was paid to the cellar and wine quality.

Thus organic wine in its earlier days did not have the best reputation with regard to taste and sensorial quality. As a matter of fact, even today one comes occasionally across the perception or assumption that organic wine is of inferior quality.

Reality shows that organic wine has developed up to prime quality levels, winning most prestigious recognition and awards even in so called conventional competitions. The annual BioFach organic wine award, with its worldwide participation and reputation, demonstrates impressive quality achievements and shows that it is correct to consider organic wine as an ambassador of good taste and top organic quality.

¹⁰ Bernward Geier is the former IFOAM director of external affairs. Bernward Geier, Alefeld 21, 53804 Much, Germany, Tel: +49-2245-618652, Email: bub.geier@t-online.de

Table 13: Organic grape area by country

COUNTRY	DATE	VINEYARDS UNDER ORGANIC MANAGEMENT (HECTARES)	SHARE OF TOTAL VINEYARDS IN A COUNTRY
Italy	2004	31'170	3.4 %
France	2004	16'428	1.9 %
Spain	2004	14'928	1.2 %
Moldova	2005	8'155	
Greece	2004	3'303	2.7 %
USA (California)	2004	3'104	1.5 %
Germany	2004	2'500	2.4 %
China	2004	2'000	1.0 %
Turkey	2004	1'988	0.3 %
Chile	2003	1'892	1.7 %
Austria	2004	1'657	3.4 %
Portugal	2004	912	0.4 %
Syria	2004	600	
Hungary	2004	579	
Switzerland	2004	358	2.4 %
New Zealand	2004	299	2.0 %
Argentina	2005	273	0.1 %
Canada	2004	99	0.9 %
Israel	2004	80	
Slovak Republic	2005	78	0.4 %
Cyprus	2005	75	
Slovenia	2004	49	0.3 %
Czech Rep.	2004	48	0.3 %
Lebanon	2005	40	
Croatia	2005	32	0.1 %
Georgia	2005	31	
Serbia/Montenegro	2004	6	
Luxemburg	2004	6	
Albania	2004	5	
Macedonia, The Fmr Yug Rep.	2005	1	
Total grape area covered by the FiBL Survey 2005/2006		90'696	

Source: FiBL Survey 2005 / 2006. For the information sources for the individual countries please check the continent tables in the continent chapters of this book.

Figures for total vine area (Year 2001) (with the exception of France): Office International de la Vigne et du Vin (O.I.V.)¹¹

Please note: data were not available for all wine / grape producing countries

11 Office International de la Vigne et du Vin (O.I.V.); General wine statistics <http://news.reseau-concept.net/images/oiv/Client/Stat%202001.pdf>

A reflection on the statistics

Even though it is great that the 2006 edition of organic world statistics includes information on grape production, it has to be stated that the data presented (more than 90'000 hectares) are not a reflection of the actual area with organic grapes.

It has not been possible to get data from some important wine growing countries like Australia. In the US, organic vineyards do not only exist in California, although this figure covers the major area in the US.

It also needs to be clarified that the grape area is not always for wine production. Especially the grape areas in China, Turkey, Greece, but also in California are not solely vineyards. They also cover substantial grape production for table grapes, raisins, sultanas etc.

Considering the fact that we have “mega” viticulture countries like Italy, France and Spain, it is not a surprise that these countries are also leaders when it comes to organic viticulture. These three countries cover far more than half of the worldwide organic viticulture area.

The fact that Italy is not only leading the statistic, but also covers almost twice as many hectares as the “runner up” France, mirrors the fact that Italy also leads the total organic area statistics in Europe. We cannot (yet) present numbers on organic grape growers and farms, but in the case of Italy, there are in the range of a couple of thousand viticulturists. Considering the fact that grape and wine producing farms are fairly small in terms of hectare size in most countries, it is a safe estimate that on a global level a several ten thousand grape producers are growing organically.

Reliable marketing and economic data were not obtainable, but a short reflection on these aspects is reasonable and possible.

In some countries like Italy and France, the share of vineyards within the total organic area has reached levels of two to over three percent. This is still a small proportion, but considering the fact that making wine (and also raisins) is highly value adding, the economic importance of grape and wine production is way beyond the mere area share. This is also supported by the fact that organic wine has a high proportion of direct marketing, giving the producers a greater and fairer share of financial returns.

Although Chile has proportionally few hectares in grapes, the share of organic wine in the export statistics of the country in the range of eight percent, which supports the conclusions above.

Compiling this data is a start, and we hope that highlighting this sector inspires those with access to regional and national data information to contribute to a more extensive and comprehensive overview in next year's edition.