



The World of Organic Agriculture The Results of the Latest Survey on Organic Agriculture Worldwide

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BioFach Congress 2013, Nürnberg, Session «The World of Organic
Agriculture» 13.2.2013

Acknowledgements

- › The Swiss State Secretariat for Economic Affairs SECO, Berne



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



- › This work would not be possible without the support of the 200 experts who contribute to the making of "The World of Organic Agriculture"

The World of Organic Agriculture 2012 and 2013

www.organic-world.net



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THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2012

OCEANIA	12.1 MILLION HA
EUROPE	10.0 MILLION HA
LATIN AMERICA	8.4 MILLION HA
ASIA	2.8 MILLION HA
NORTH AMERICA	2.7 MILLION HA
AFRICA	1.1 MILLION HA

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THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2013

OCEANIA	12.2 MILLION HA
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BIOFACH

FAO Statistical Yearbook: Includes organic farming data in 2012

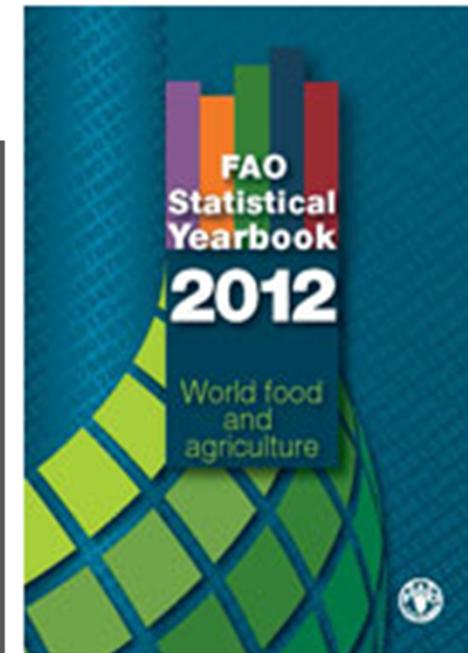
PART 4

Organic farming

Organic agriculture is a production management system that aims to promote and enhance ecosystem health, including biological cycles and soil biological activity. It is based on minimizing the use of external inputs, and represents a deliberate attempt to make the best use of local natural resources. Methods are used to minimize pollution of air, soil and water. Organic agriculture comprises a range of land, crop and animal management procedures, circumscribed by a set of rules and limits usually enforced by inspection and certification mechanisms. Synthetic pesticides, mineral fertilizers, synthetic preservatives, pharmaceuticals, Genetically Modified Organisms (GMOs), sewage sludge and irradiation are prohibited in all organic standards.

Growth rates of land under organic management in Western Europe, Latin America and the Caribbean, and the United States of America have been impressive despite low-base beginnings and the reclassification of land. Between 1995 and 2010, the combined area of organic cultivation tripled to 38 million hectares. A number of industrial countries have action plans for developing organic agriculture. Targets are set for the sector's growth and resources are allocated to compensate farmers during, and sometimes after, the conversion period, and also to support research and extension in organic agriculture.

Organic practices that encourage soil biological activity and nutrient cycling include: manipulating crop rotations and strip cropping; green manuring and organic fertilization (animal manure, compost, crop residues), minimum tillage or zero tillage and avoidance of pesticide and herbicide use. Research indicates that organic agriculture significantly increases the density of beneficial invertebrates, earthworms, root symbionts and other



Key indicators 2011

- › **162 countries** have data on organic agriculture (2010: 160 countries).
- › **37.2 million hectares** of agricultural land are organic (1999: 11 million).
- › In **10 countries more than ten percent** of the farmland is organic (2010: 7 countries).
- › **1.8 million producers** were reported (2010: 1.6 million).
- › The **global market** reaches **62.8 billion US dollars**.
- › **86 countries** have an organic **legislation**.

FiBL-IFOAM-Survey: Number of countries and territories covered

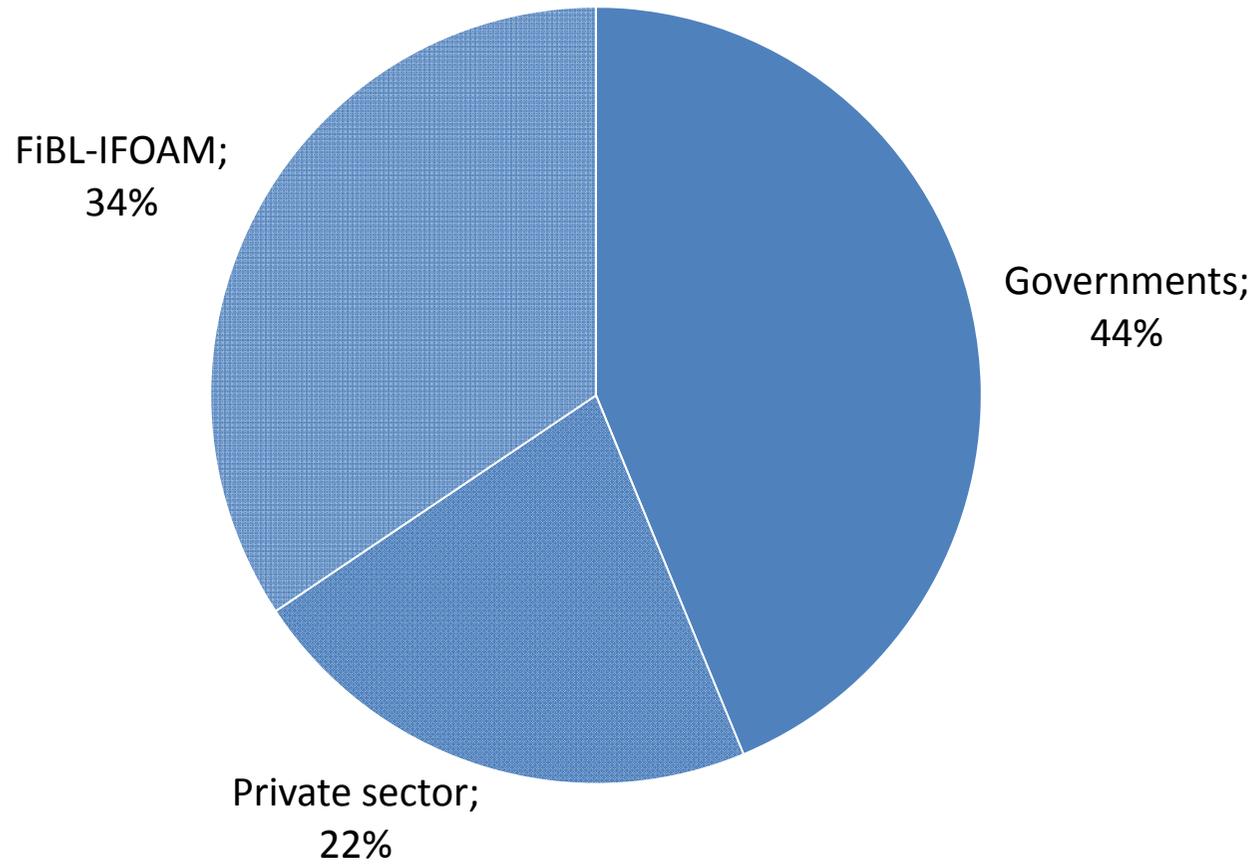
Table 1: Countries and territories covered by the global survey on organic agriculture 2011

	Countries* with data on organic agriculture	Countries per region ¹	Share of countries that provided data (%)
Africa	37	57	65
Asia	37	49	76
Europe	46	46	100
Latin America and Caribbean	29	45	64
North America	2	5	40
Oceania	11	23	49
World	162	224	72

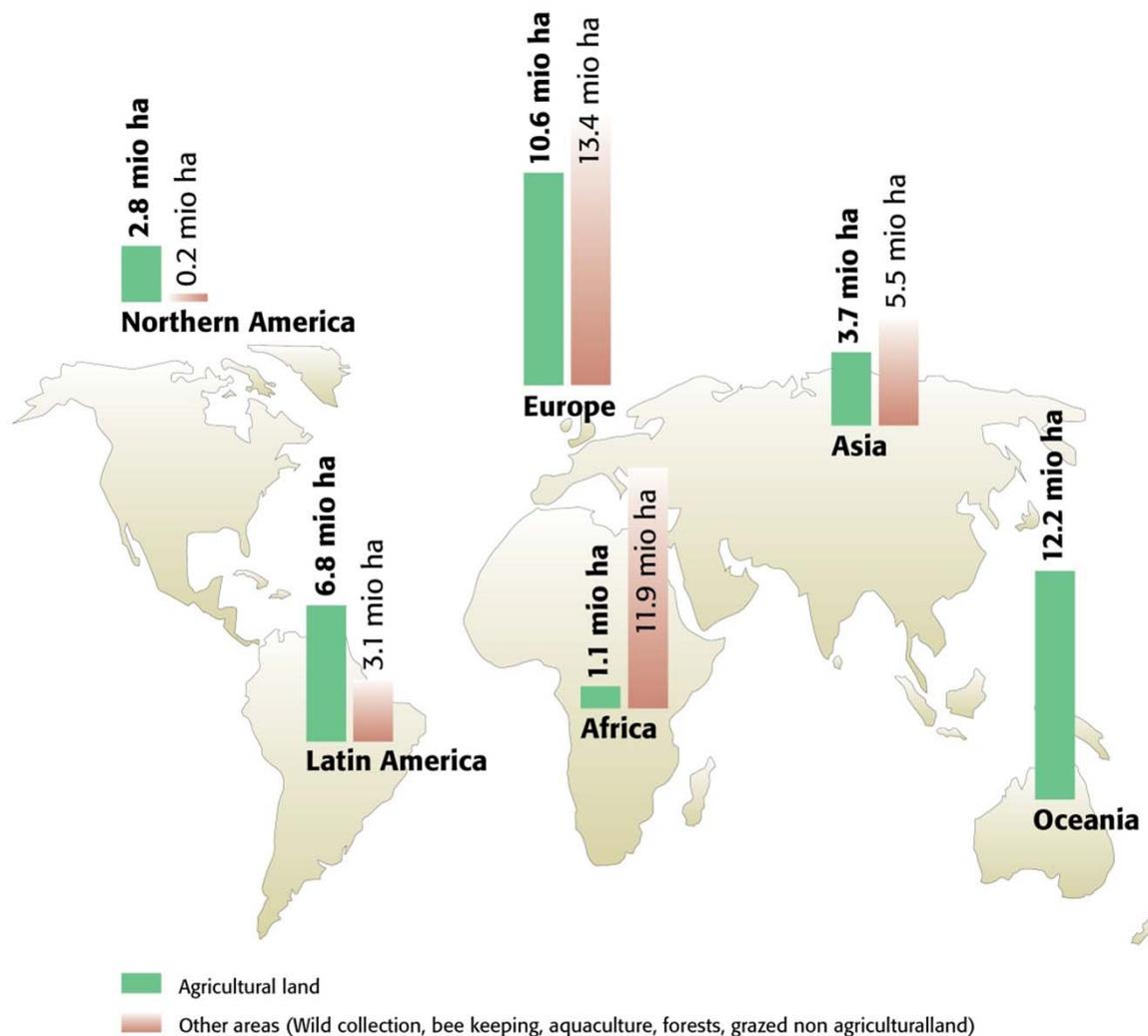
Source: FiBL-IFOAM Survey 2013

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

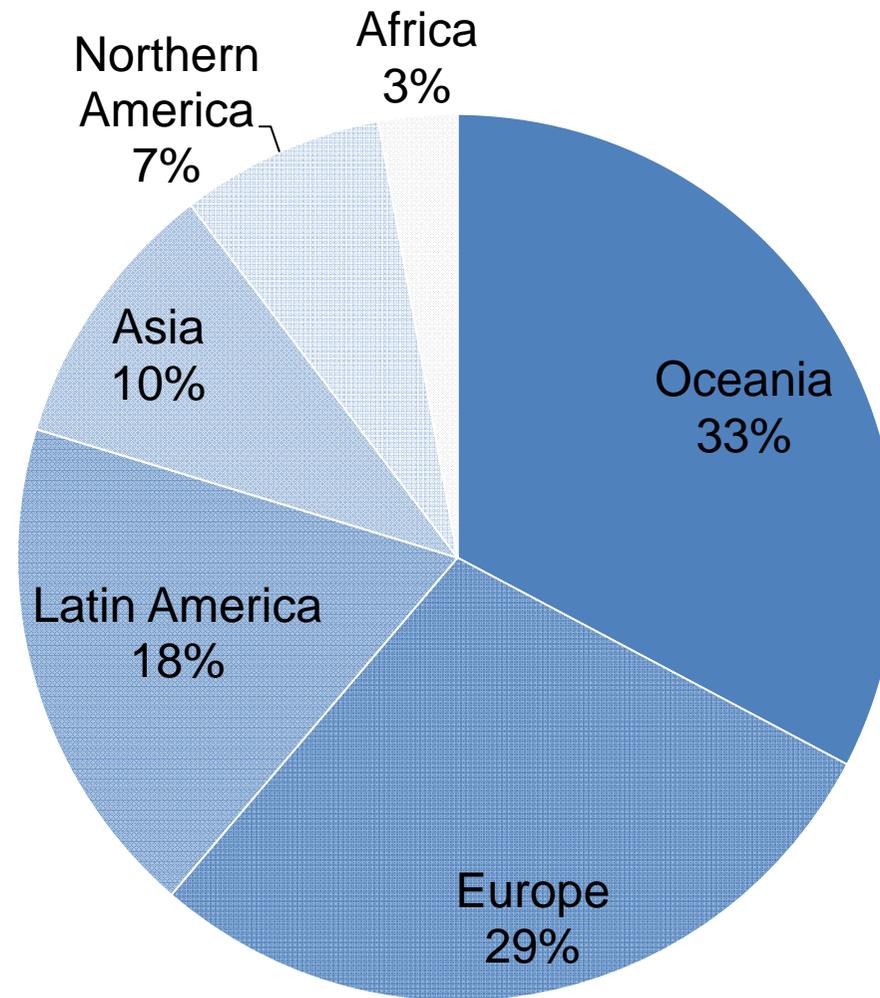
Data collection systems of area and operator data



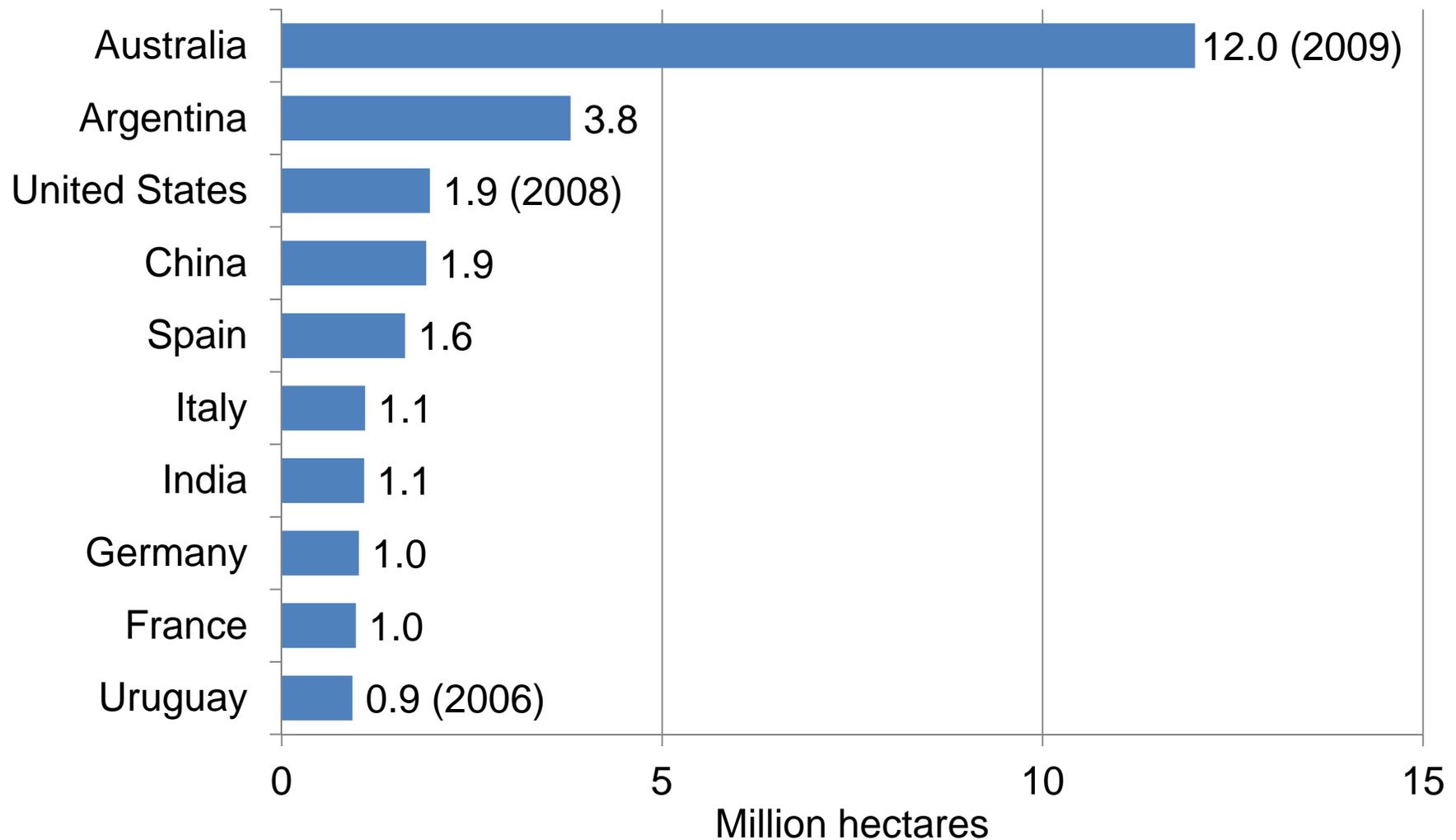
Organic agricultural land and other areas 2011



Distribution of organic agricultural land by region 2011



The ten countries with the most organic agricultural land 2011



Shares of organic agricultural land in the regions 2011

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2011

Continent	Organic agr. land [ha]	Share of total agr. land*
Africa	1'073'657	0.1%
Asia	3'706'280	0.3%
Europe	10'637'128	2.2%
Latin America	6'857'611	1.1%
Northern America	2'790'162	0.7%
Oceania	12'185'843	2.9%
Total**	37'245'686	0.9%

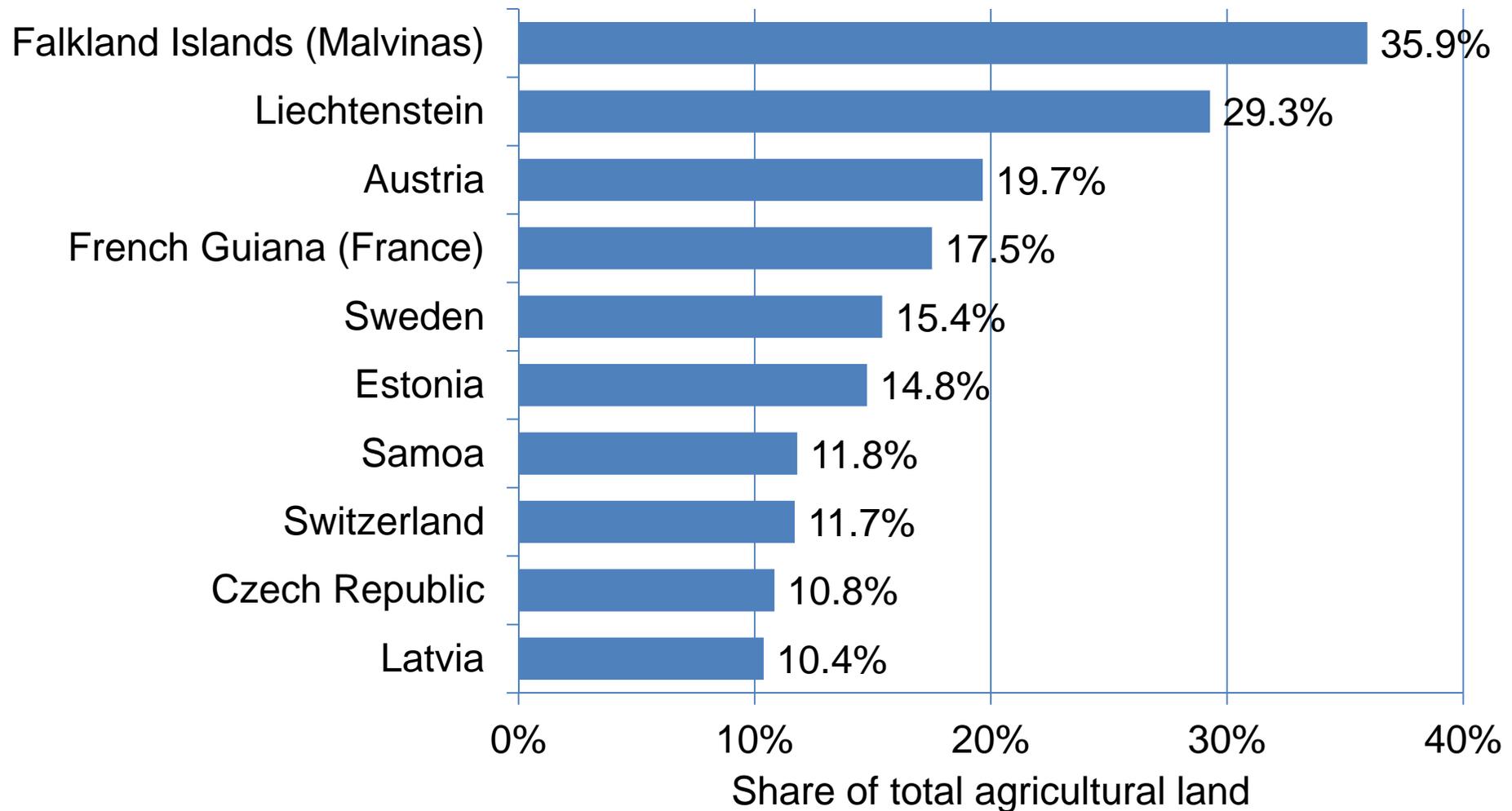
Source: FiBL-IFOAM Survey 2013.

*For the calculation of the shares of total agricultural land, only the countries that are included in the survey were used.

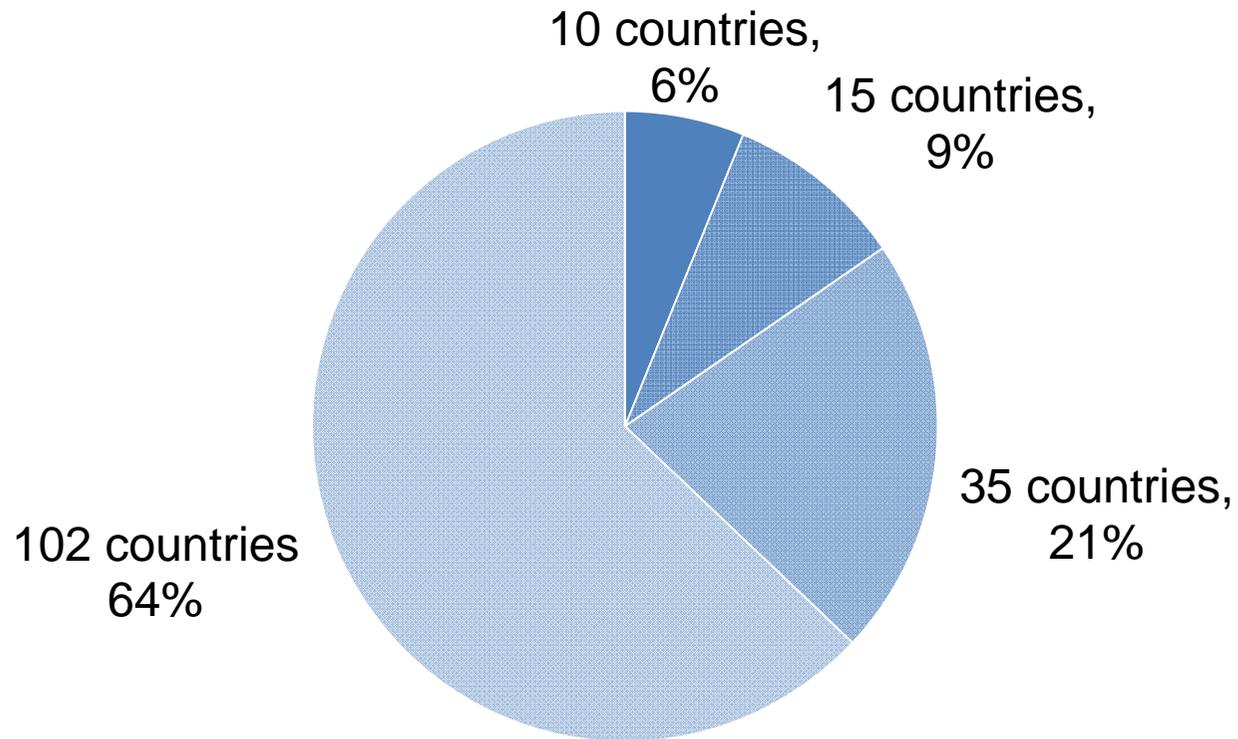
** Total includes correction value for French overseas departments.

(European Union: 5.4 %)

The countries with the highest shares of organic agricultural land 2011

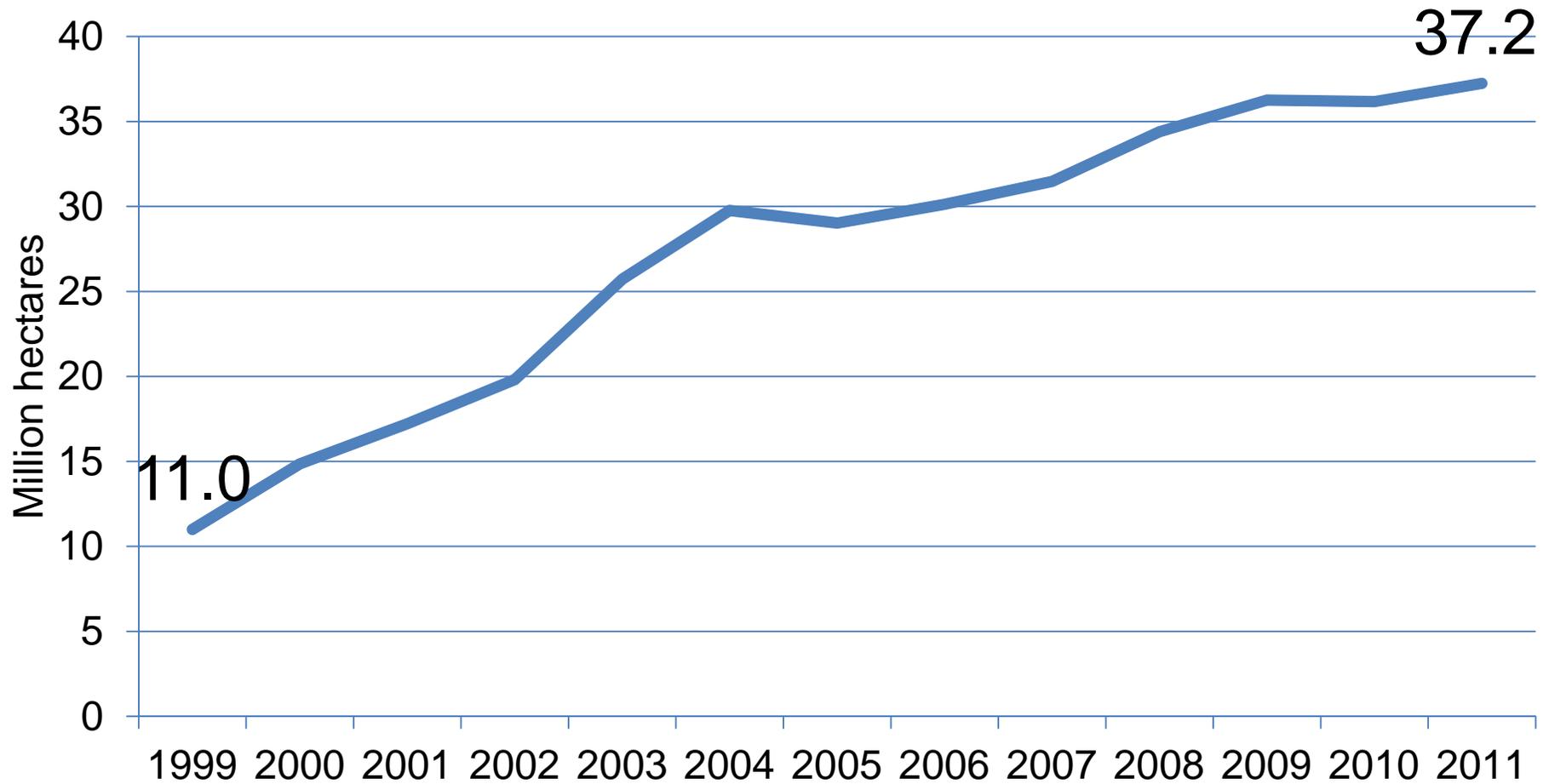


Distribution of organic shares 2011

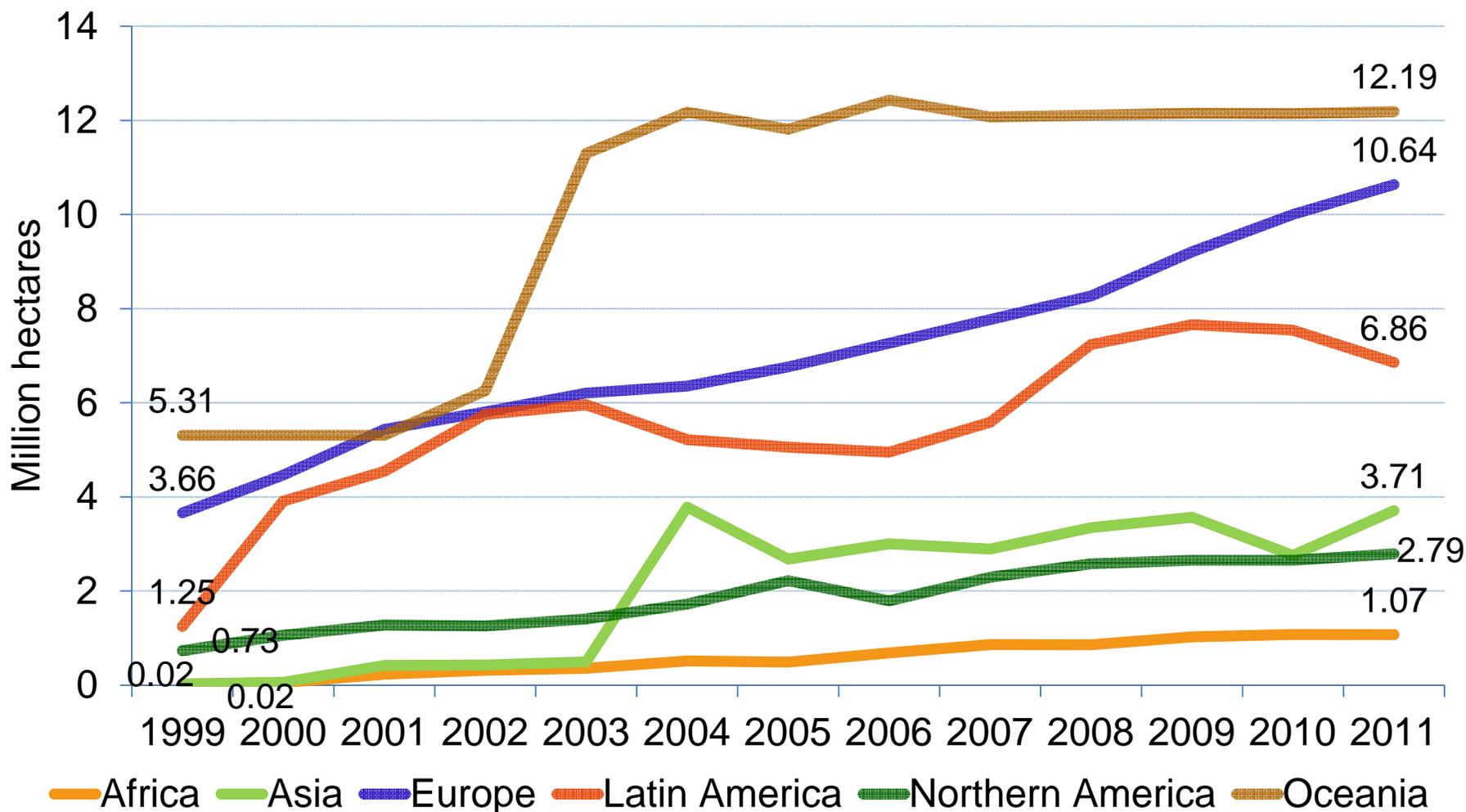


- More than 10%
- Between 10-5%
- Between 5-1%
- Less than 1%

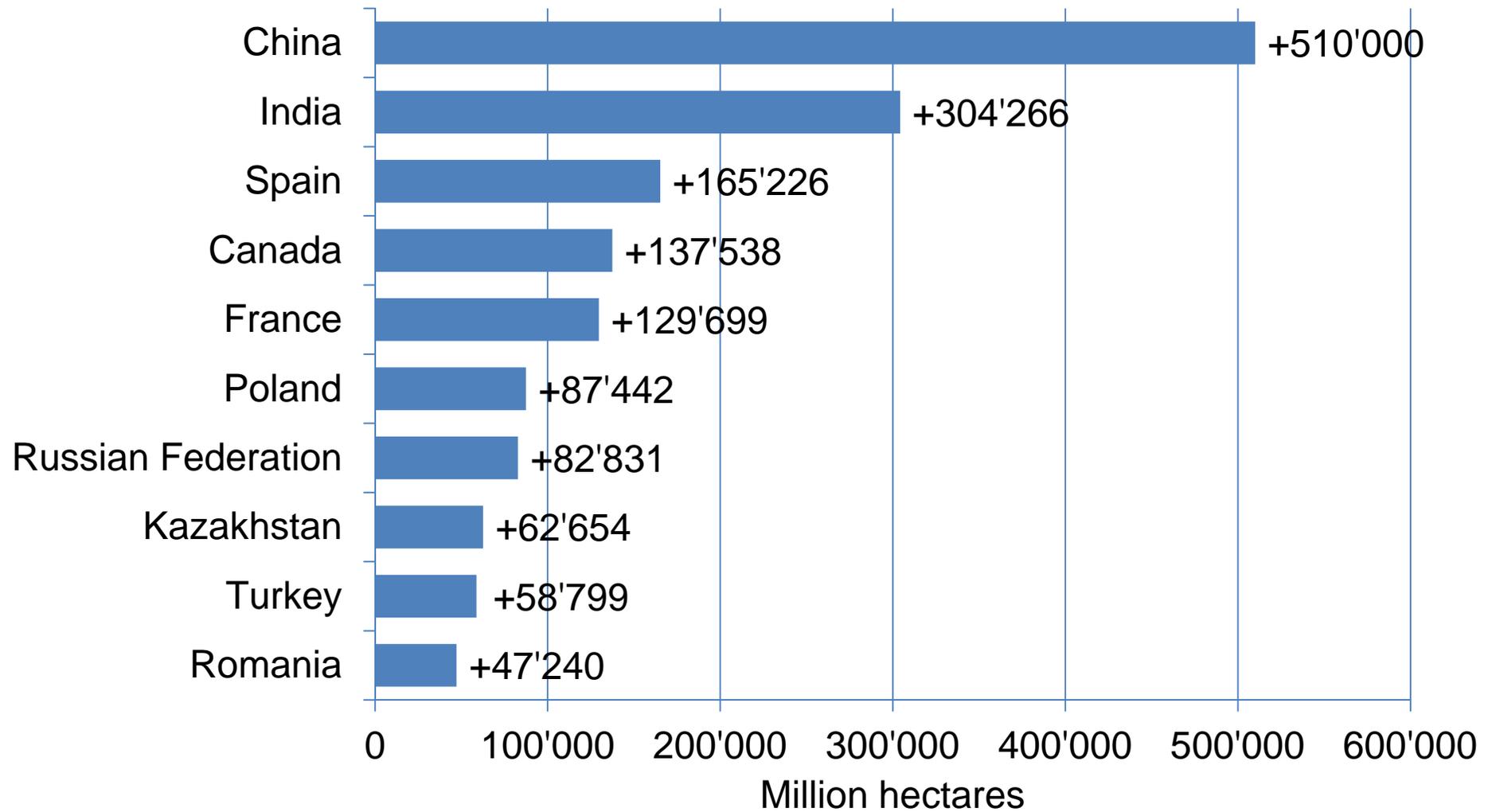
Growth of the organic agricultural land 1999-2011



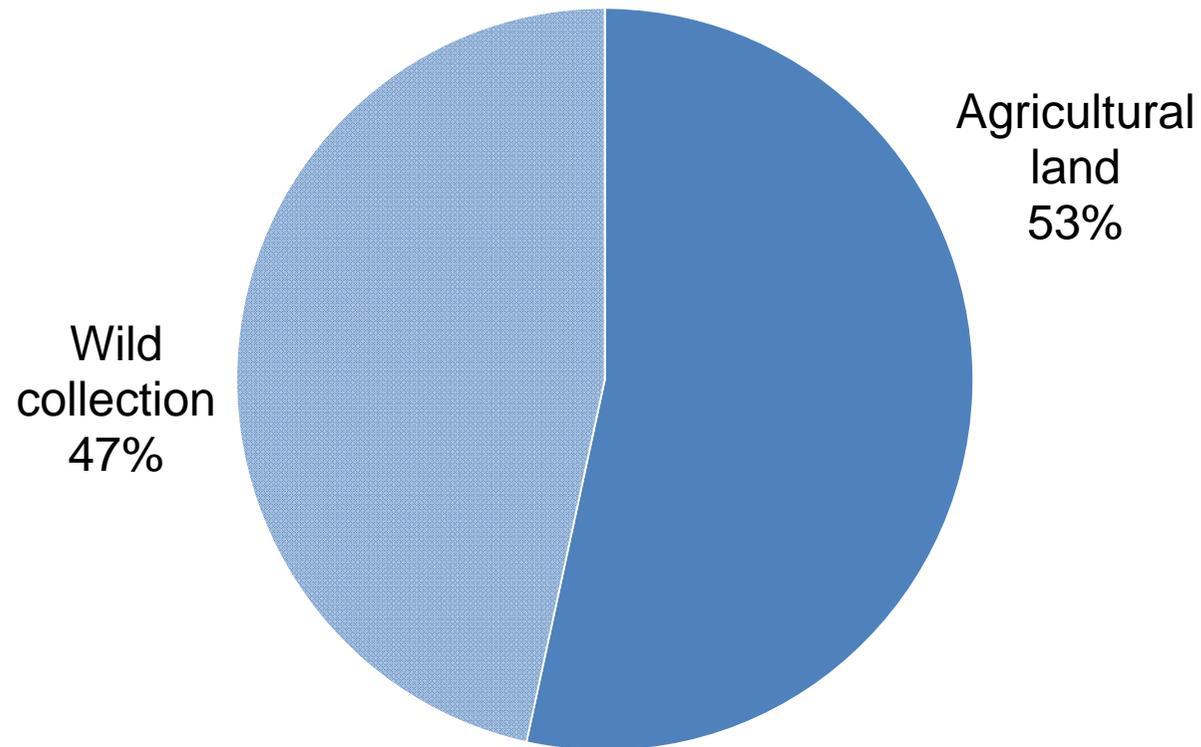
Development of organic agricultural land in the regions 1999-2011



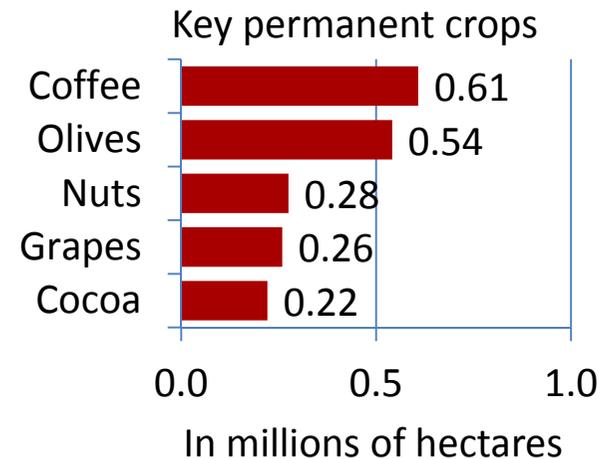
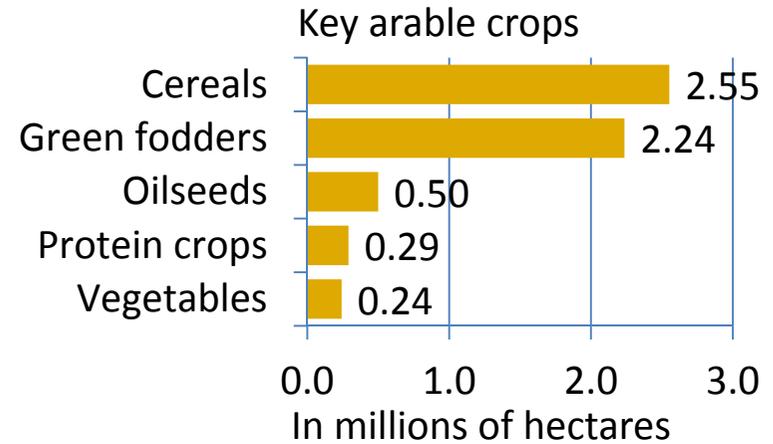
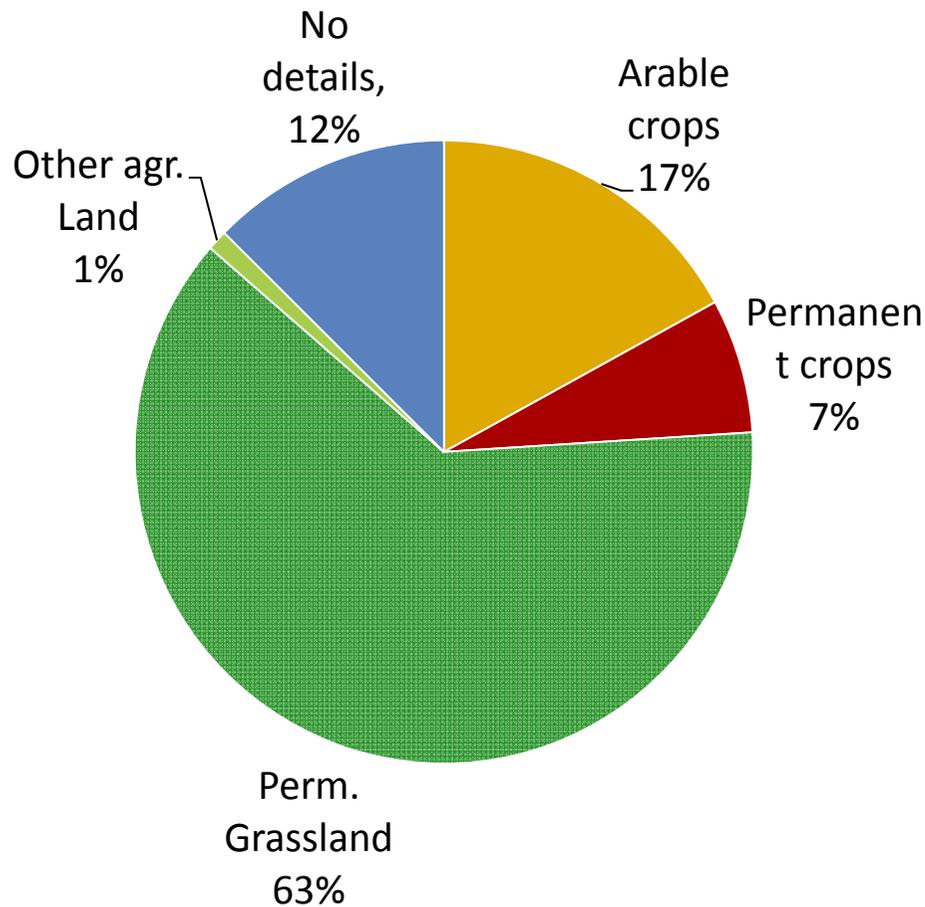
The ten countries with the largest increase of organic farmland 2011



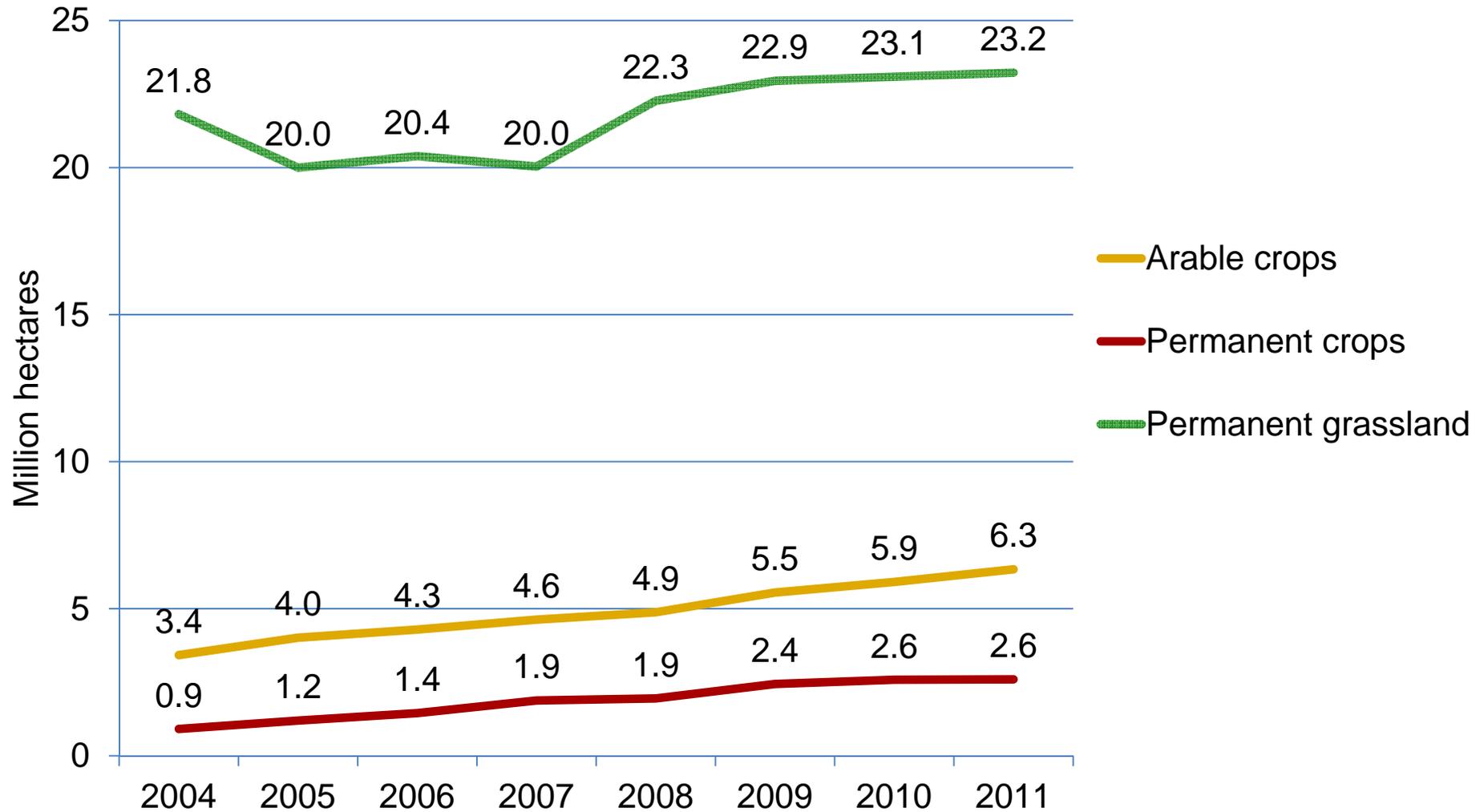
Organic agricultural land and other areas 2010



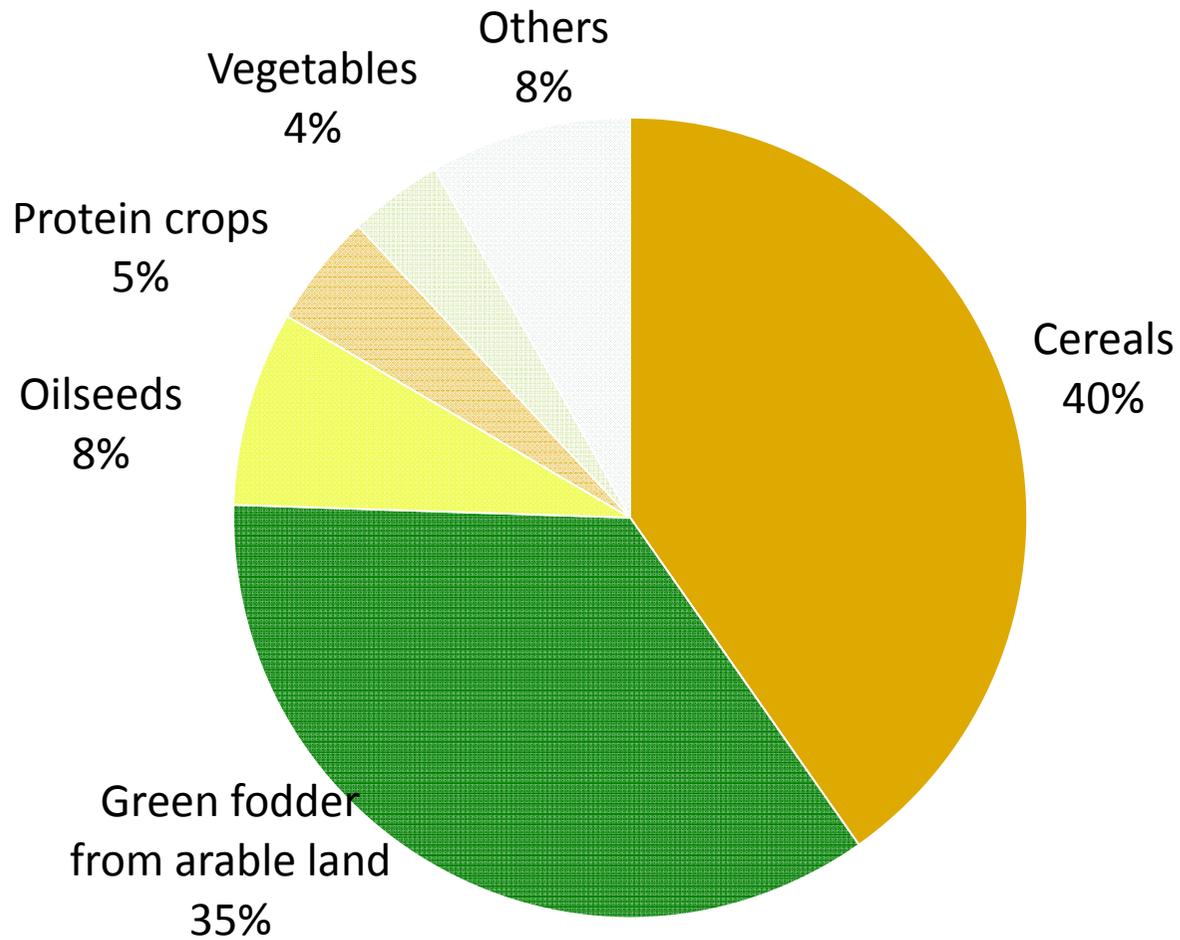
Land use and key crops 2011



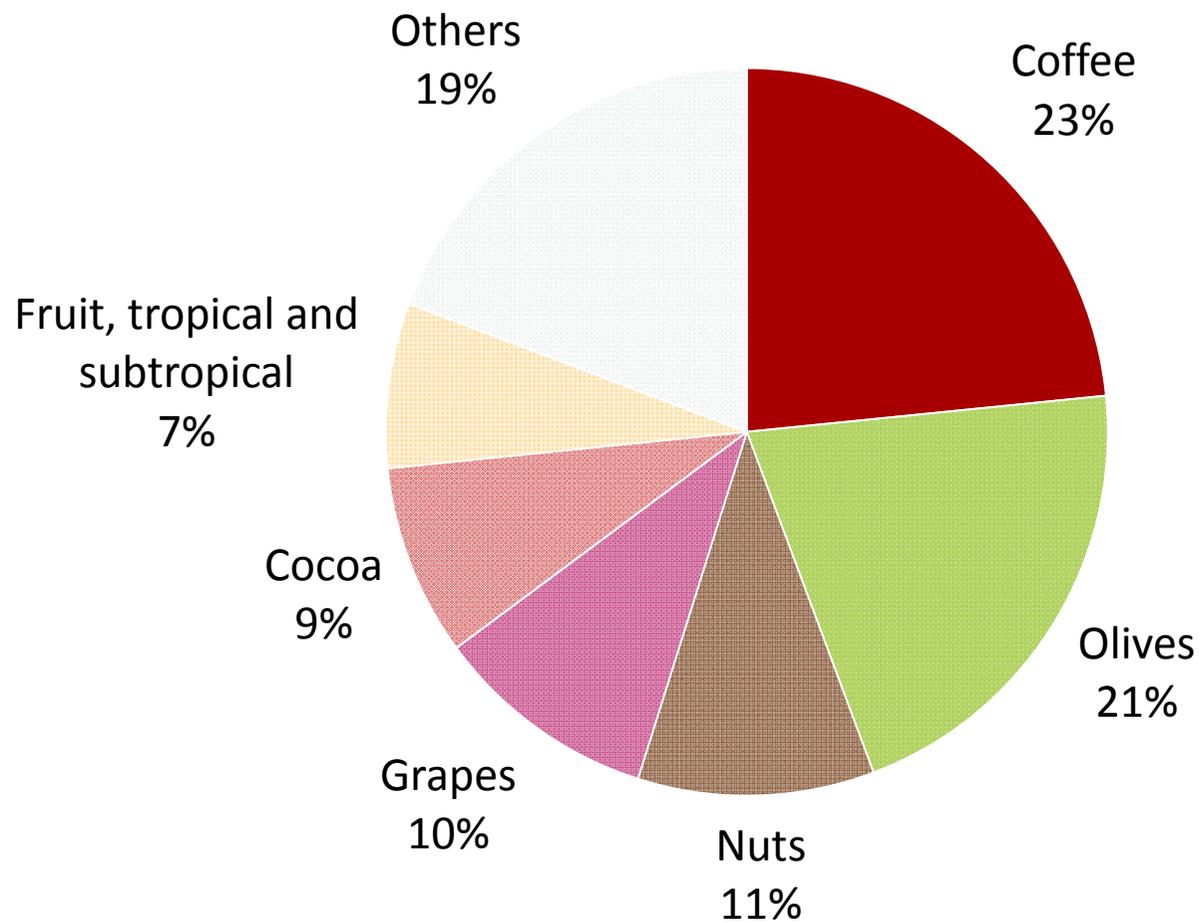
Development of organic land uses



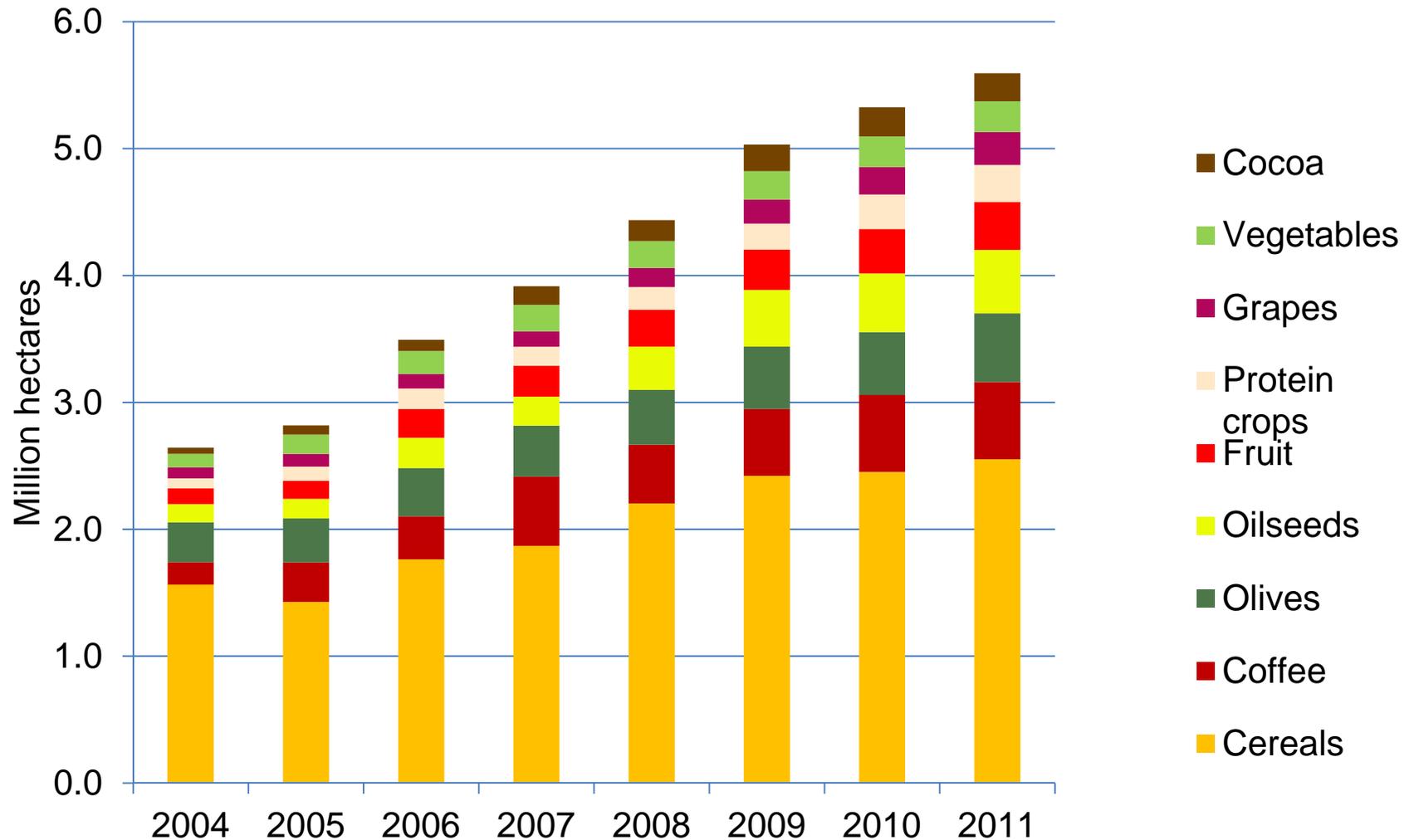
Use of arable land (total: 6.3 million hectares)



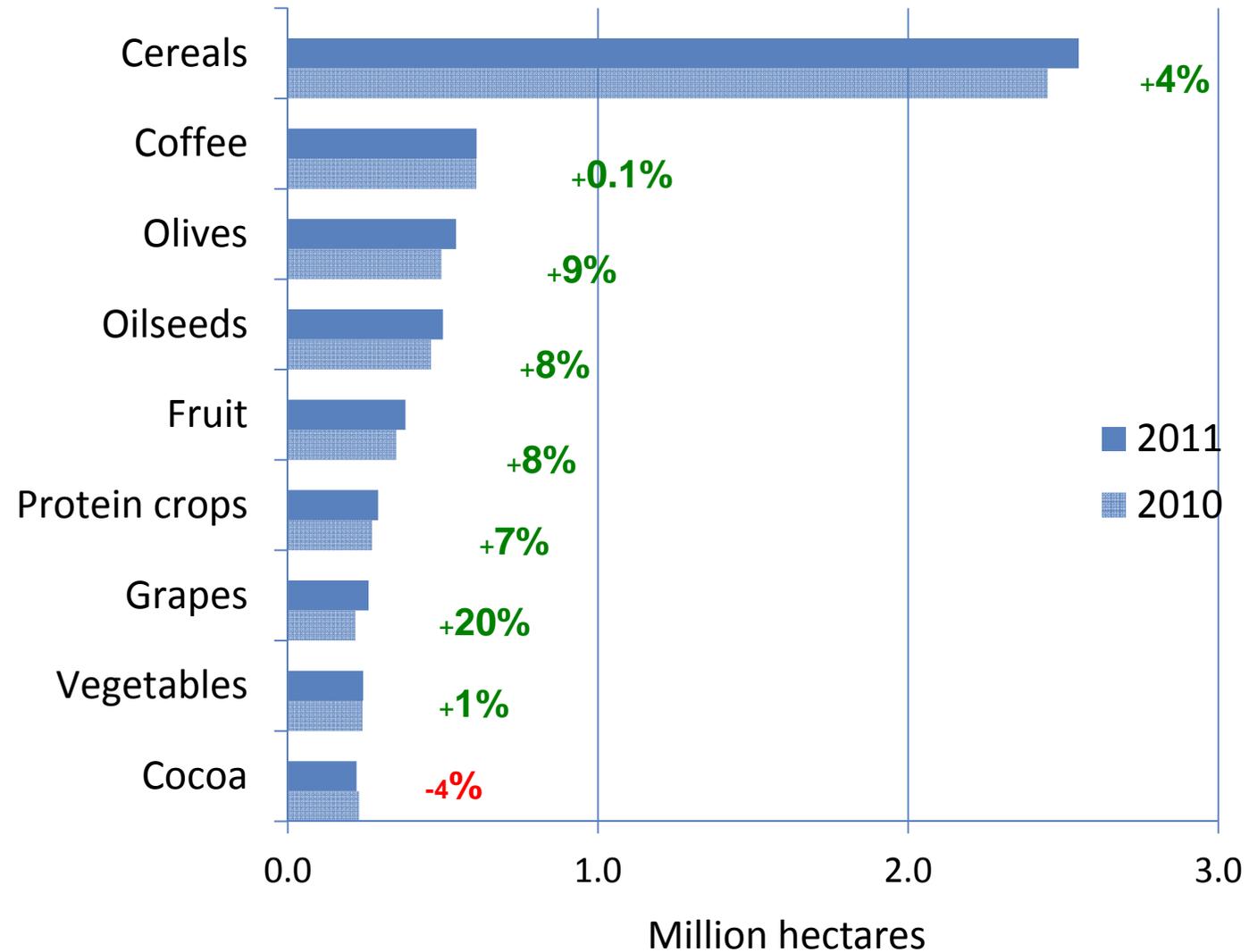
Use of permanent crop land (total 2.6 million hectares)



Development of organic land uses

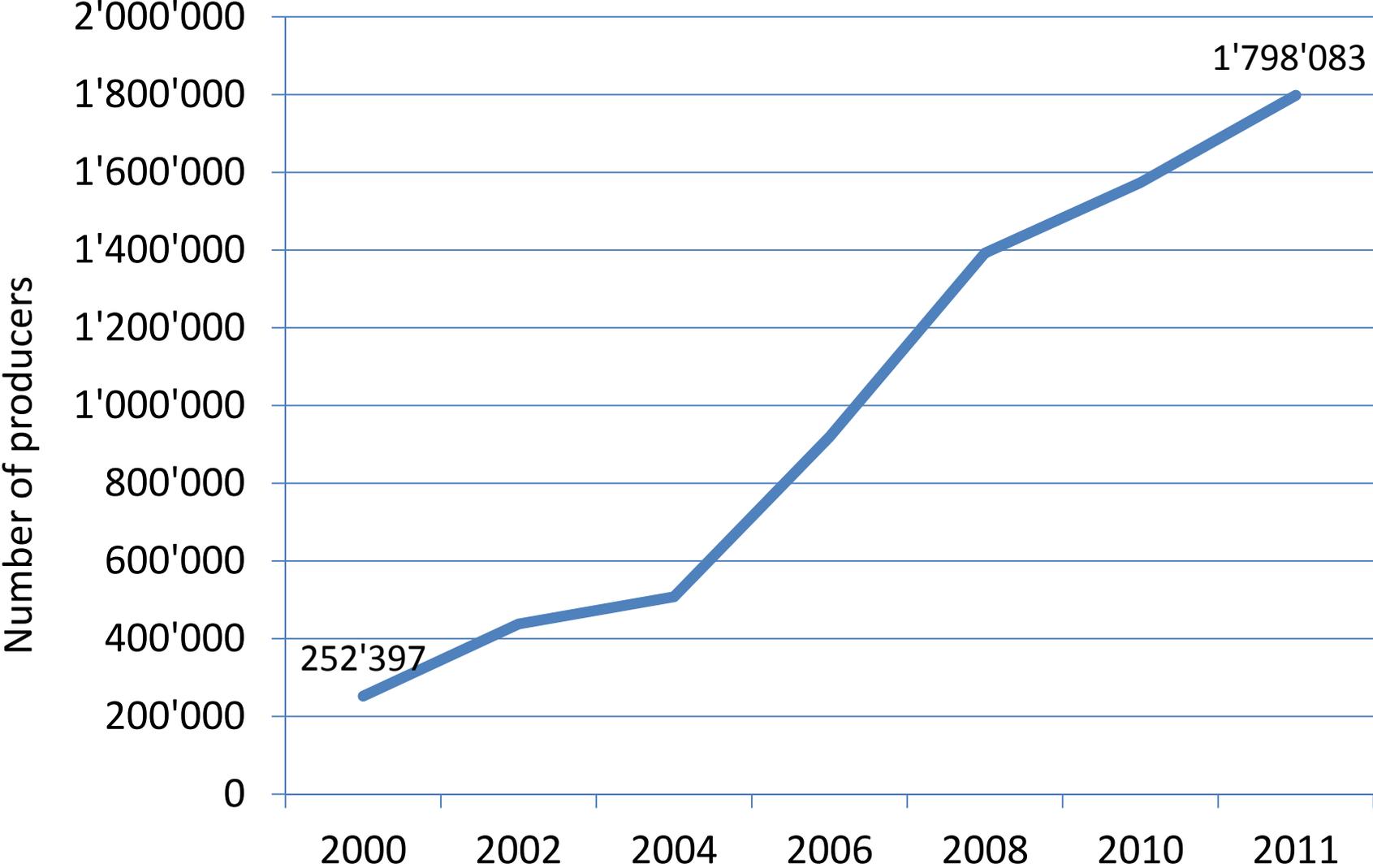


The ten countries with the most organic agricultural land 2011

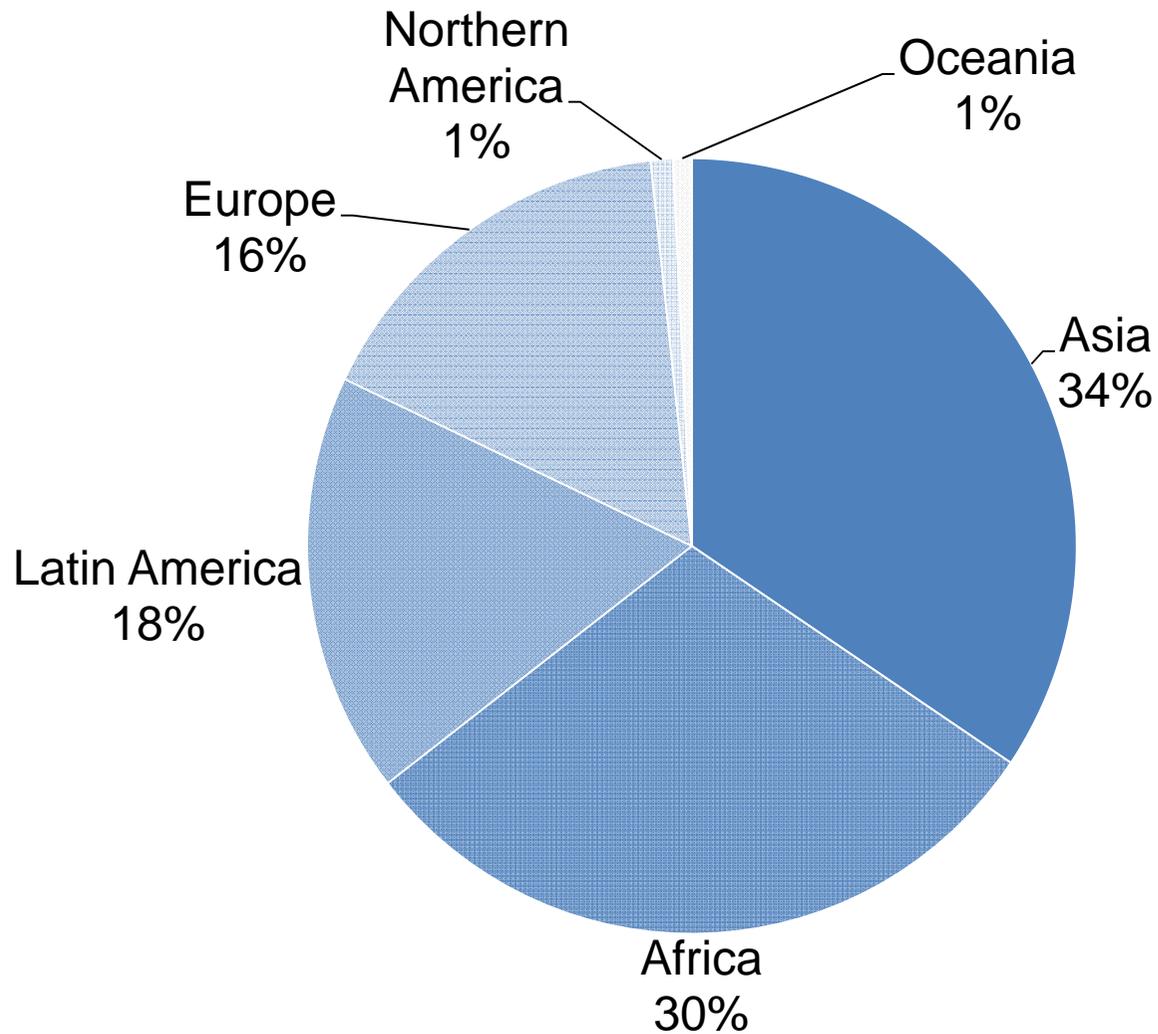


Growth of the number of producers

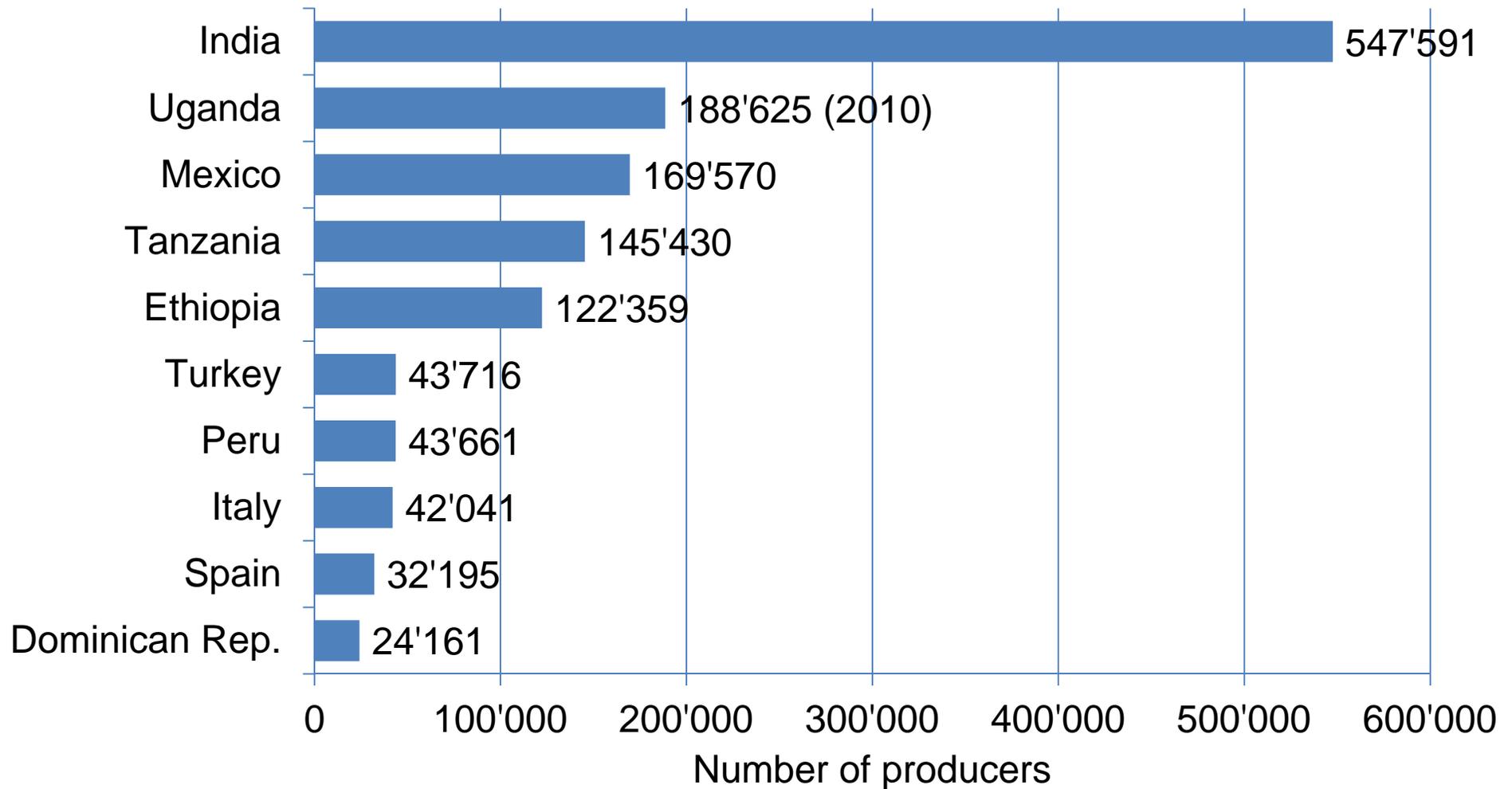
Source: FiBL-IFOAM-SOEL-Surveys 1999-2013



Distribution of organic producers by region 2011

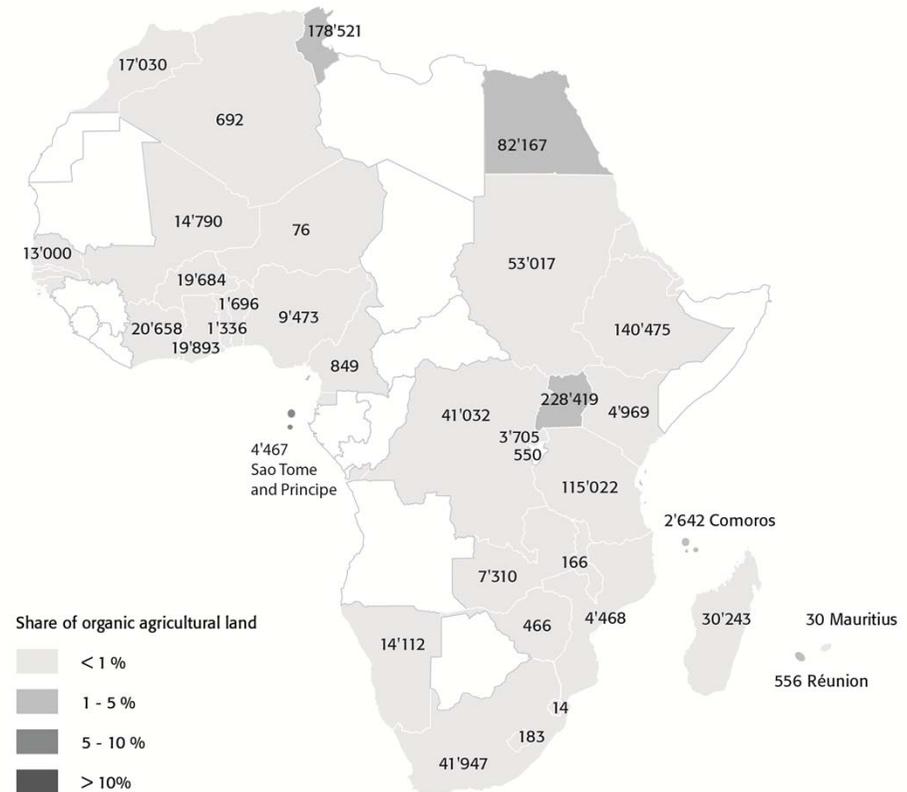


The ten countries with the most organic producers 2011



Africa: Organic agricultural land by country 2011

- › In Africa, there were 1.1 million hectares of certified organic agricultural land (data 2011).
- › This constitutes about three percent of the world's organic agricultural land.
- › More than 550'000 producers were reported.
- › The countries with the most organic land are Uganda (228'419 hectares), Tunisia (178'521 hectares), and Ethiopia (140'475 hectares).
- › The highest shares of organic land are in Sao Tome and Prince (8 percent), Egypt (2.2 percent), and Tunisia (1.9 percent).
- › The majority of certified organic produce in Africa is destined for export markets; in Tunisia the export value for organic products was 44 million euros in 2011.
- › The European Union, as the major recipient of these exports, is Africa's largest market for agricultural produce.



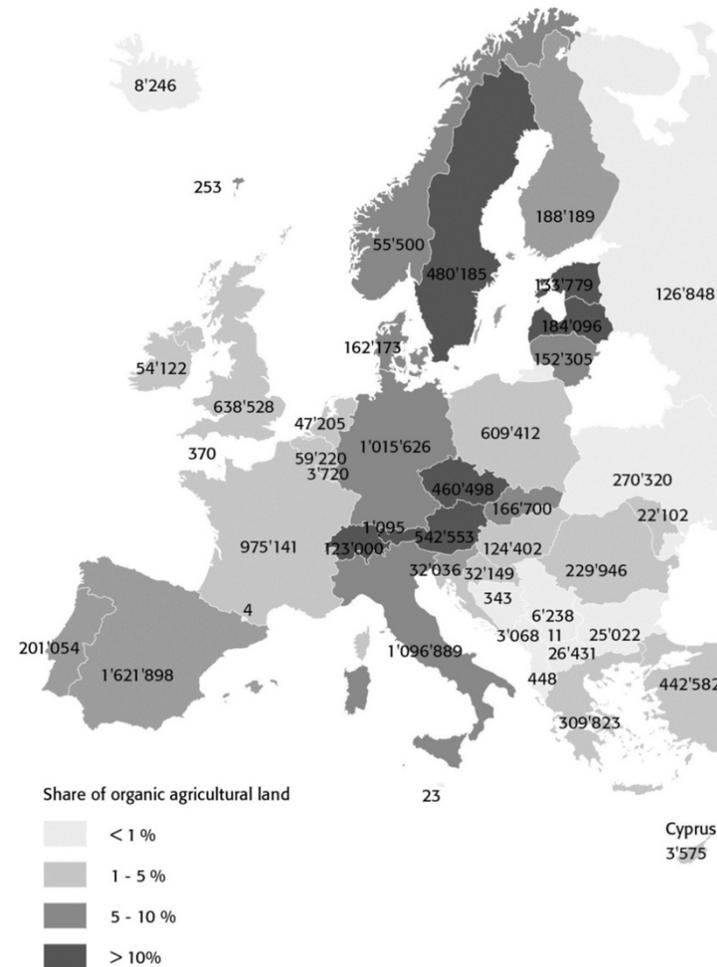
Asia: Organic agricultural land by country 2011

- › The total organic agricultural area in Asia was 3.7 million hectares in 2011.
- › This constitutes ten percent of the world's organic agricultural land.
- › There were 0.6 million producers reported.
- › The leading countries by organic agricultural land are China (1.9 million hectares) and India (1 million hectares).
- › Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent).



Europe: Organic agricultural land by country 2011

- › 10.6 million hectares of agricultural land are organic (including in conversion areas).
- › This constitutes 2.2 percent of the agricultural land in Europe.
- › The organic agricultural land increased by 0.6 million hectares or six percent in 2011 .
- › Amost 290'000 producers were reported.

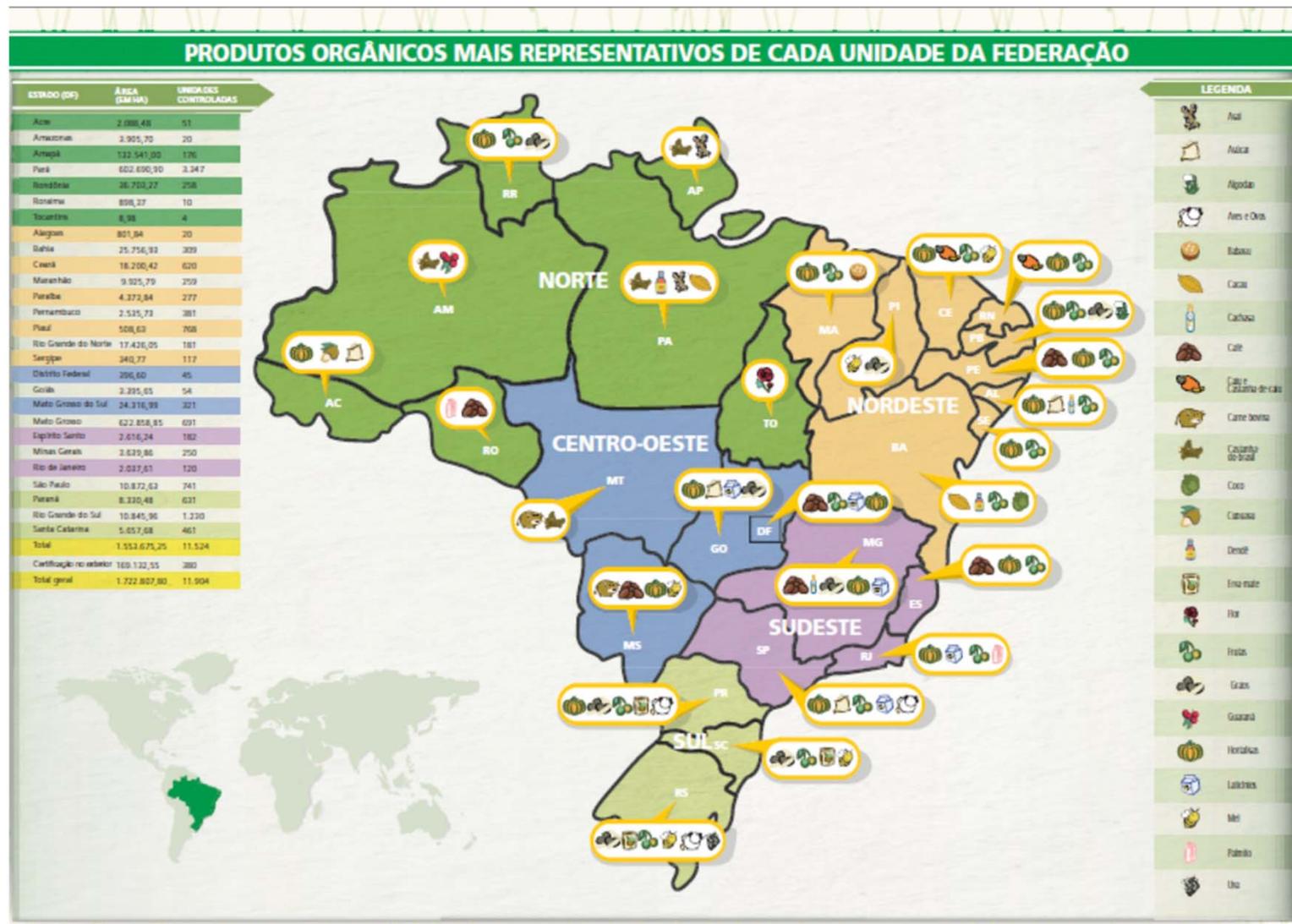


Latin America/Caribbean: Organic agricultural land by country 2011

- > In Latin America, more than 300'000 producers managed 6.9 million hectares of agricultural land organically in 2011.
- > This constitutes 18 percent of the world's organic land and 1.1 percent of the regions agricultural land.
- > The leading countries are Argentina (3.8 million hectares), Uruguay (0.93 million hectares), and Brazil (0.69 million hectares).
- > The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.9 percent), French Guiana (17.5 percent), and the Dominican Republic (9.6 percent).

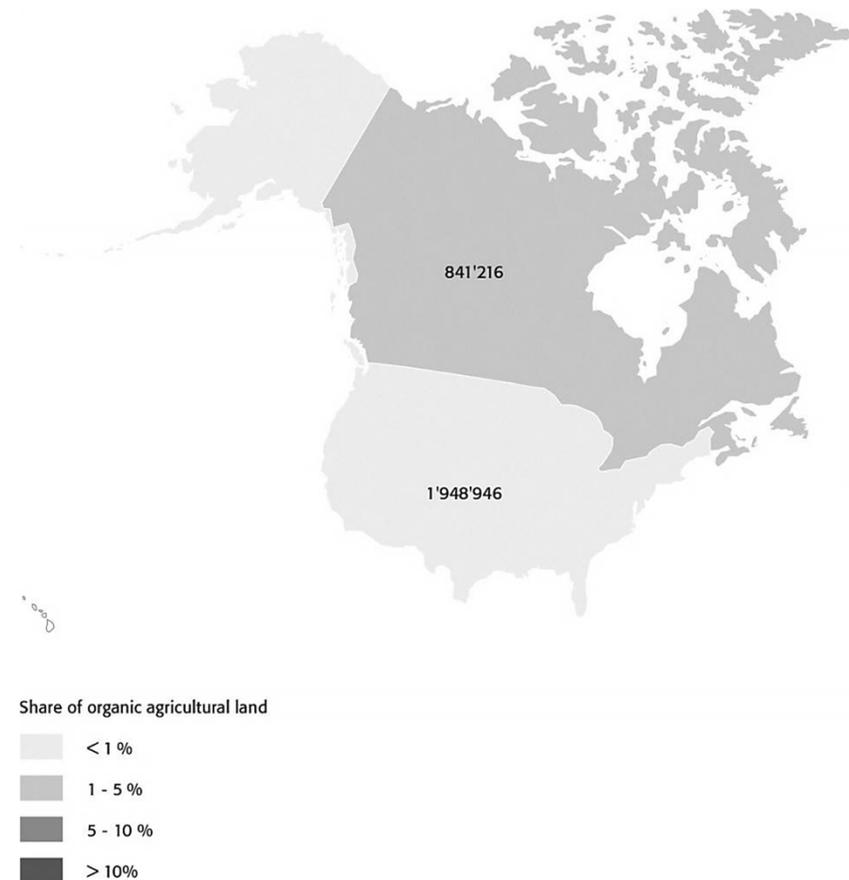


Brasil: Map of organic products



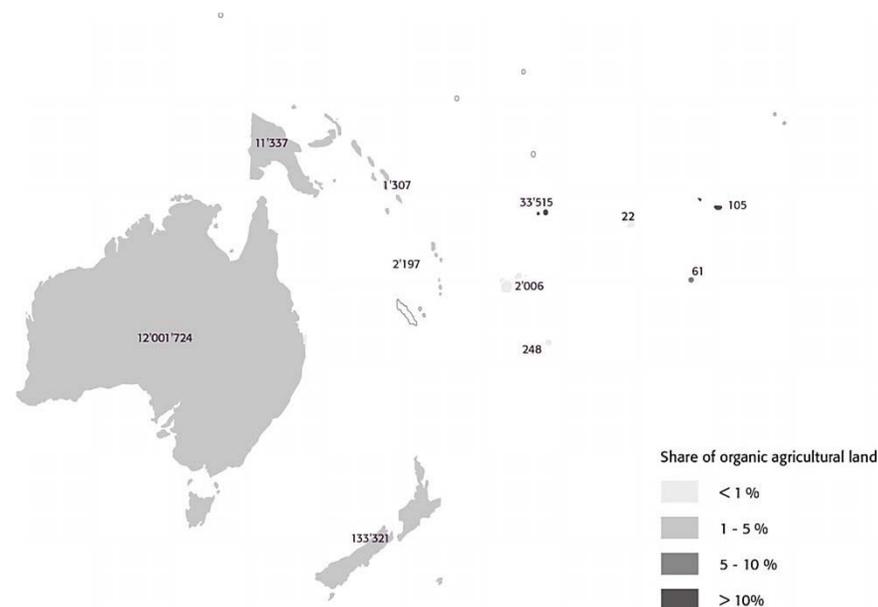
North America: Organic agricultural land by country 2011

- › In North America, almost 2.8 million hectares are managed organically, of these nearly two million in the United States and 0.8 million in Canada.
- › This represents 0.7 percent of the total agricultural area in the region and more than 7 percent of the world's organic agricultural land.
- › Organic product sales in 2011 grew by more than 9 percent overall, to reach 22.9 billion euros.

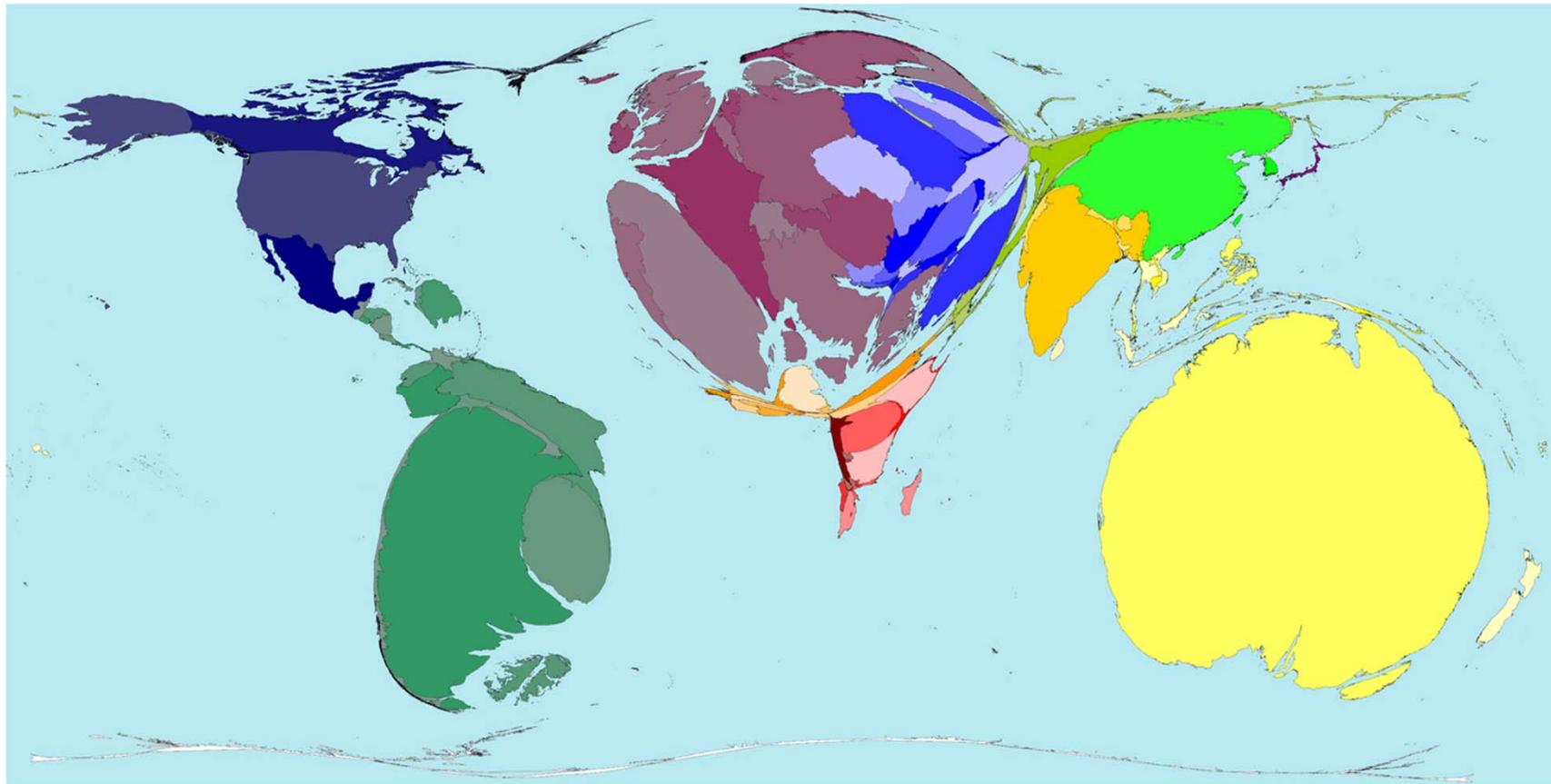


Oceania: Organic agricultural land by country 2011

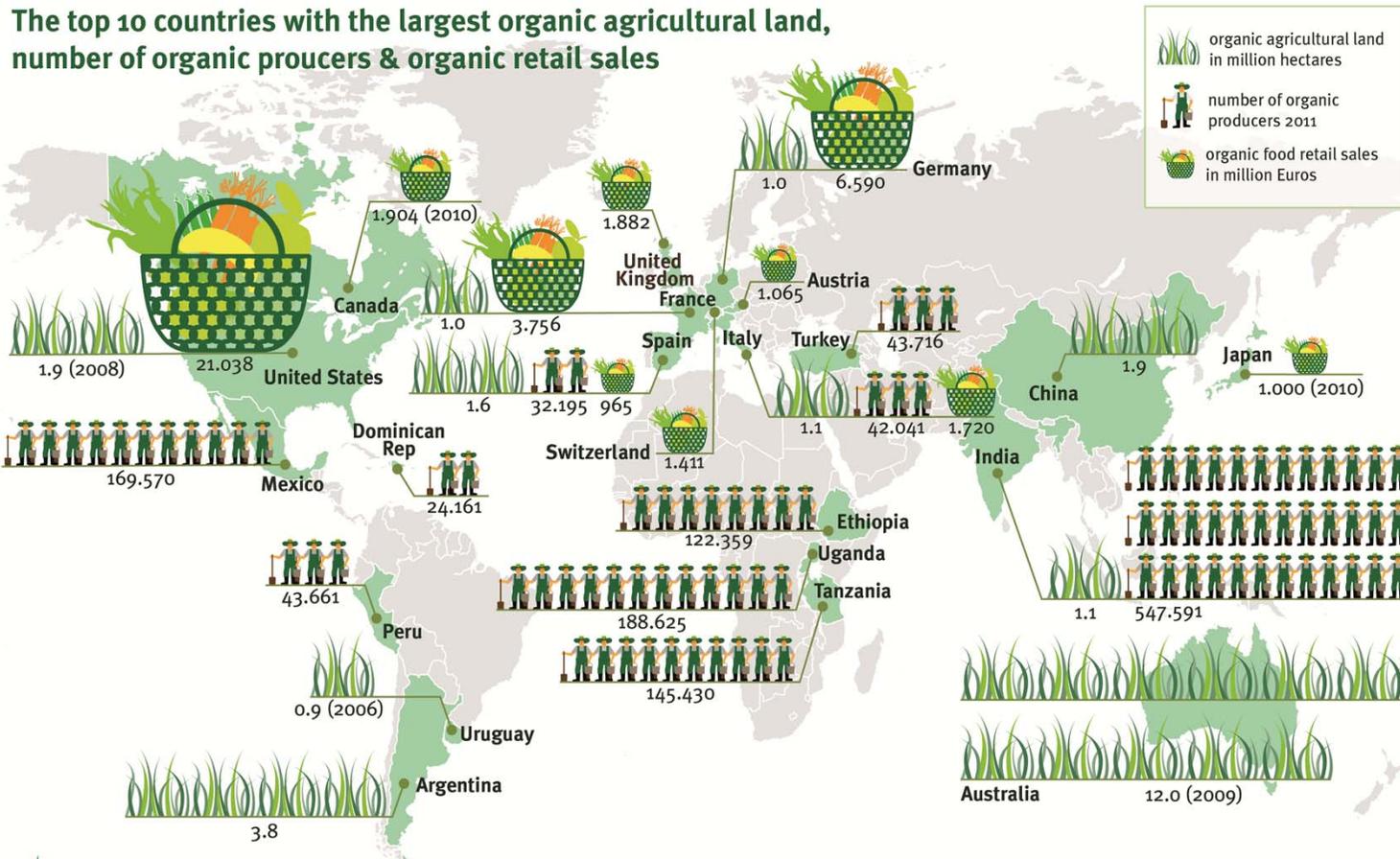
- › This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu.
- › Altogether, there are 13'763 producers, managing 12.2 million hectares.
- › This constitutes 2.9 percent of the agricultural land in the area and almost 33 percent of the world's organic land.
- › Ninety-eight percent of the organic land in the region is in Australia (12 million hectares, 97 percent of which is extensive grazing land), followed by New Zealand (133'321 hectares), and Samoa (33'515 hectares).
- › The highest shares of all agricultural land are in Samoa (11.8 percent), followed by Australia (2.9 percent), Solomon Islands (1.6 percent), and Niue (1.2 percent).



The world of Organic Agriculture 2011: Equalizing-density map by John and Henning



Area, producers, markets – the ten leading countries 2011

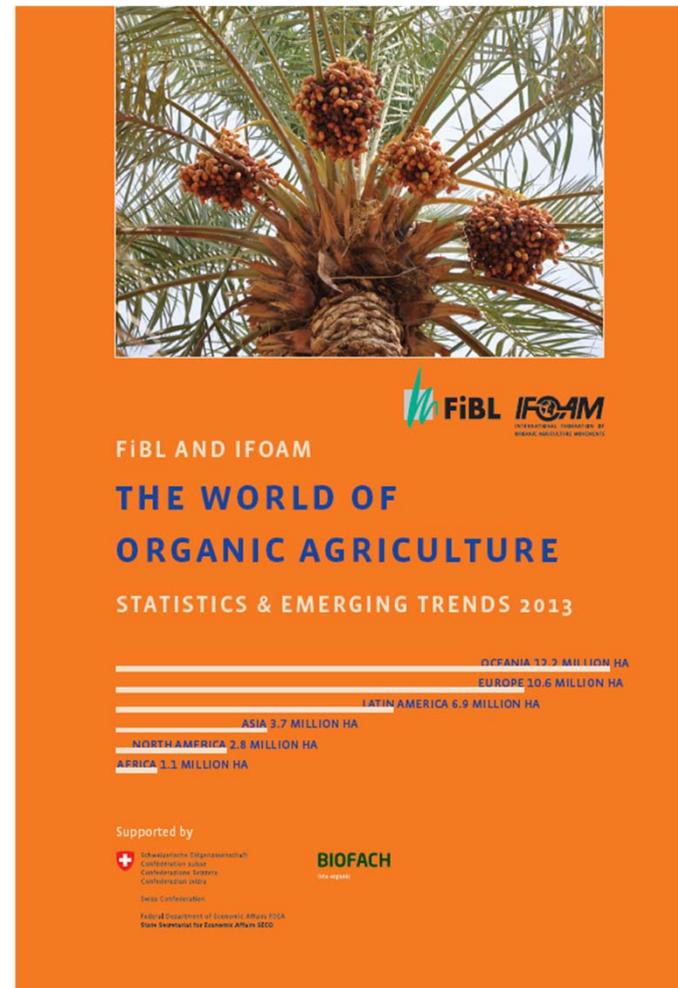


FiBL IFOAM Source: FiBL-IFOAM survey 2013

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The World of Organic Agriculture 2013

- › 14th edition of The World of Organic Agriculture
- › Is available at the FiBL and the IFOAM booths (Hall 1, Stands 150 and 240). There is a discount for IFOAM members
- › After BioFach the book can be bought at the FiBL and (shop.fibl.org) IFOAM webshops www.ifoam.org.
- › Presentations, key data and background is available at www.organic-world.net/yearbook-2013.html.



Conclusions

- › The organic agricultural land area (37.2 million hectares in 2011) has remained stable between 2010 and 2011.
- › In Europe, however, organic farmland increased by 6.3 percent.
- › 1.8 million organic producers were reported, most of these are in developing/transition and emerging market countries.
- › Developments in the year 2011 show that the institutional embedding of organic farming (with support of advice, research, marketing) is important in order to guarantee a constant development of the organic sector.
- › For more and more countries data on organic agriculture are available; but data collection and processing need to be improved in many countries, not only on land area and land use and crops grown and operators, but also on market and international trade data.

Indicator	World	Leading countries
Countries with data on certified organic agriculture	2011: 162 countries	
Organic agricultural land	2011: 37 million hectares (1999: 11 million hectares)	Australia (12 mio. hectares, 2009) Argentina (3.8 mio. hectares) US (1.9 mio. hectares, 2008)
Share of total agricultural land	2011: 0.86 %	Falkland Islands (Malvinas) (35.9 %) Liechtenstein (29.3 %) Austria (19.7 %)
Further, non-agricultural organic areas (mainly wild collection)	2011: 32.5 million hectares (2010: 43 million hectares; 2009: 41 million hectares)	Finland (7 million hectares) Zambia (5.9 million hectares; 2009) India (4.5 million hectares)
Producers	1.8 million producers (2010: 1.6 million producers; 2009: 1.8 million producers)	India (547'591), Uganda (188'625), Mexico (169'570)
Organic market size	63 billion US dollars (2010: 59.1 billion US dollars 1999: 15.2 billion US dollars) Source: Organic Monitor	US (21 billion euros or 29 billion USD, Germany (6.6 billion euros or 9.2 billion USD) France (3.7 billion euros or 5.2 billion USD)
Per capita consumption	2011: 9.02 US dollars	Switzerland (177 euros or 250.4 USD), Denmark (161.9 euros or 225.7 USD) Luxemburg (134.3 euros or 187.3 USD)
Number of countries with organic regulations 2011	86 countries (2010: 84 countries)	
Organic certifiers 2011	2012: 576 certifiers (2011: 549; 2010 532)	South Korea, Japan, USA
Number of IFOAM affiliates	1.1.2013: 766 affiliates from 117 countries	Germany: 96 affiliates; India: 46 affiliates; China: 40 affiliates; United States: 33 affiliates; The Netherlands: 31 affiliates