



Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2016

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 2016: 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 2016 in FiBL & IFOAM – Organics International (2016) The World of Organic Agriculture. Statistics and Emerging Trends 2016. Frick and Bonn
- › For updates check www.organic-world.net
- › This presentation is available online at: <http://www.organic-world.net/yearbook/yearbook2016/slide-presentations.html>
- › Texts and graphs: Helga Willer and Julia Lernoud; Research Institute of Organic Agriculture, FiBL, Frick, Switzerland
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- › © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2016

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

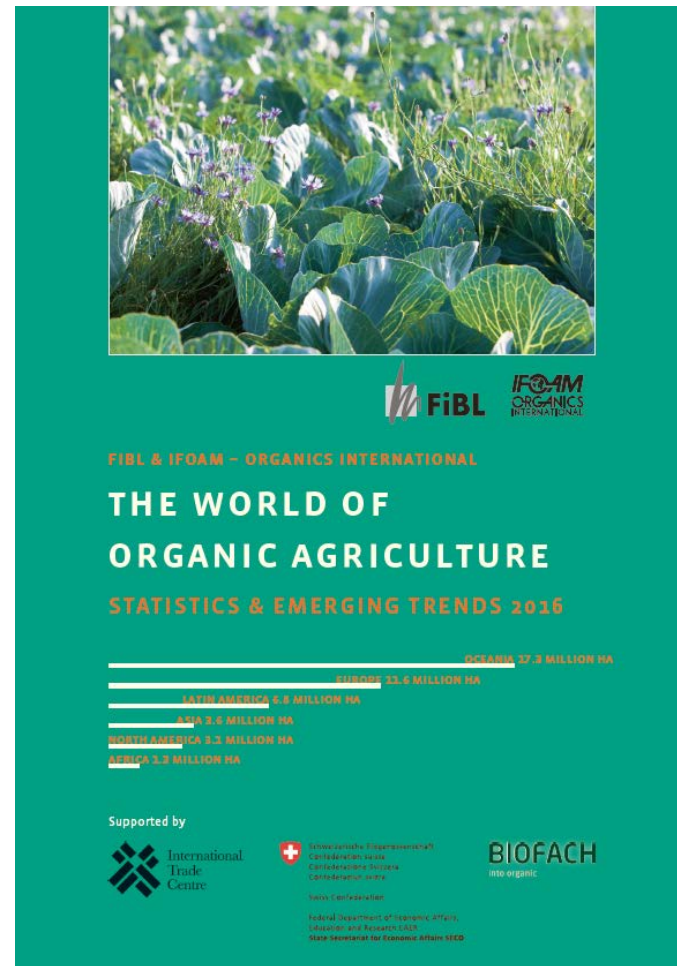


- › 200 experts from all parts of the world contributed to the FiBL survey 2016.

* 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.
 - › *Willer, H, Lernoud, J, (2016) The World of Organic Agriculture. Statistics and Emerging Trends 2016. 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 displays the 'Organic World' website interface. At the top, the title 'Organic World' is followed by the subtitle 'Global organic farming statistics and news'. A navigation bar includes links for Home, News, About, Statistics, Yearbook (highlighted), Q&A, Country info, Link library, and Contact / Site info. Below the navigation bar, a list of yearbook editions is provided, ranging from 2016 down to 2000-2007. A search bar is located below the list. The main content area features the title 'Yearbook "The World of Organic Agriculture"' and a detailed description of the publication, its history, and its funding sources. On the right side, there are two featured yearbook covers: 'The World of Organic Agriculture 2016' and 'The World of Organic Agriculture 2015', each with a list of available resources such as 'Table of contents', 'Press release', and 'Order book'.

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.

Countries covered by the survey on organic agriculture 2014

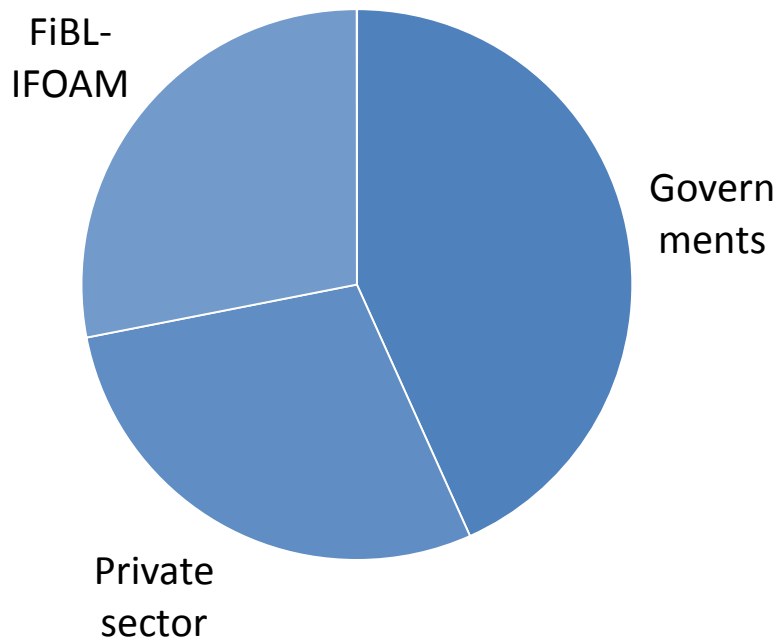
Table 1: Countries and areas covered by the global survey on organic agriculture 2014

Region	Countries* with data on organic agriculture	Countries per region ¹	Share of countries that provided data (%)
Africa	39	56	70%
Asia	37	47	79%
Europe	47	47	100%
Latin America and Caribbean	33	46	72%
North America	3	5	60%
Oceania	13	26	50%
World	172	227	76%

Source: FiBL survey 2016

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

Organic data collection systems world-wide for data on area, operators and production (total 172 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 2016 or www.organic-world.net/statistics-data-sources.html
- › Countries: For countries and areas, FiBL and IFOAM used the Standard Country and Area Codes Classifications as defined by the United Nations Statistics division.
- › 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 shares of organic agricultural land, based on the Eurostat and FAOSTAT data, might differ from the organic shares obtained from ministries or local experts.
- › Producers: Some countries report the number of smallholders, and others only the numbers of companies, projects or grower groups, which may each comprise a number of producers.
- › 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>.

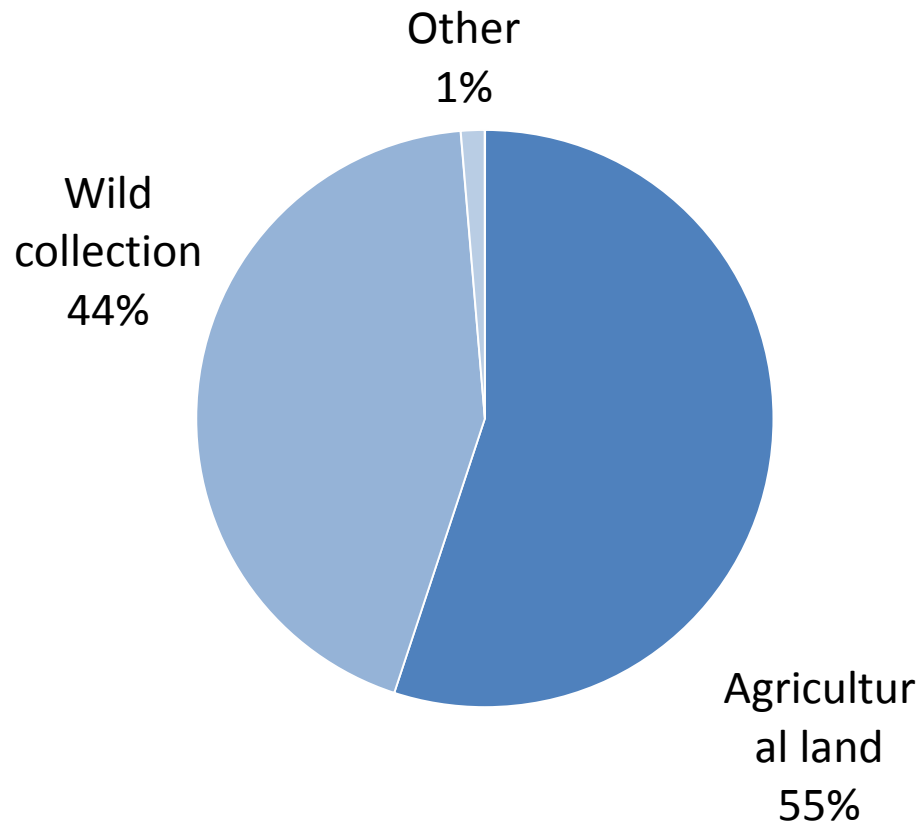
Key data/indicators on organic agriculture world-wide 2014

- › 172 countries have data on organic agriculture.
- › 43.7 million hectares of agricultural land are organic (including conversion areas).
- › 11 countries have more than ten percent organic agricultural land, and 15 countries have between 5 and 10 percent organic agricultural land.
- › There are more than 37.5 million hectares of further non agricultural areas.
- › 2.3 million producers were reported.

World: Distribution of organic areas 2014

Distribution of all organic areas in 2014

Source: FiBL Survey 2016



> Agricultural land (43.7 million hectares in 2014)

> 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 (37.6 million hectares in 2014)

> Wild collection/Bee keeping (37.4 million hectares)

> Forest

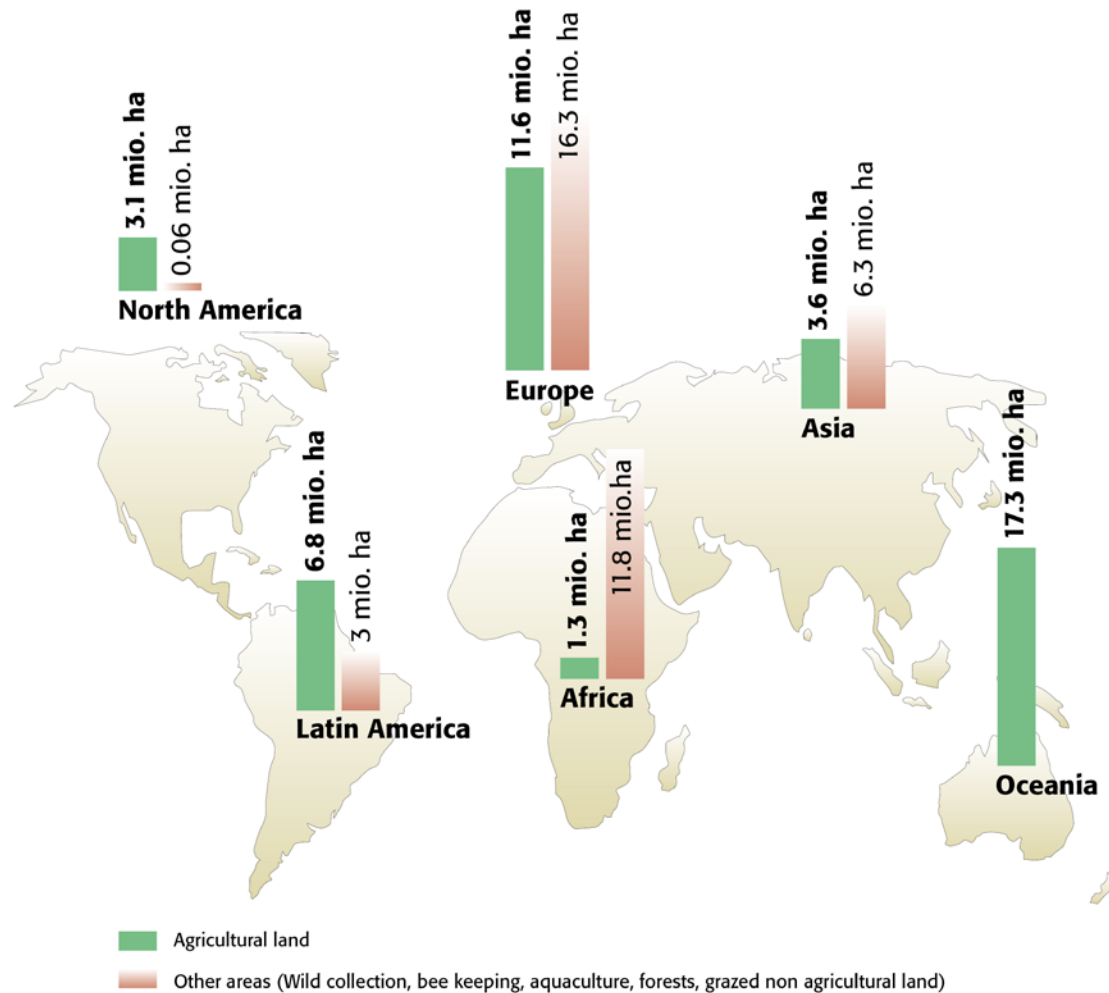
> Aquaculture

> Grazing areas on non-agricultural land

World: Organic agricultural land by region 2014

- › Currently 43.7 million hectares are under organic agricultural management (end of 2014 for most data).
- › The distribution of the organic agricultural land is as follows:
 - › Oceania (17.3 million hectares);
 - › Europe (11.6 million hectares);
 - › Latin America (6.8 million hectares),
 - › Asia (3.6 million hectares),
 - › North America (3.1 million hectares), and
 - › Africa (1.3 million hectares).
- › Oceania has 40 percent of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, almost 30 percent of the world's organic agricultural land. Latin America is has 15 percent of the world's organic land.
- › In addition to the agricultural land, there are 37.5 million hectares of non-agricultural areas, mainly wild-collection.

World: Organic agricultural land and other organic areas 2014



WORLD: ORGANIC FARMLAND 2014

43.7
Mio ha

Australia
17.2
Mio ha

Approx. 1%
of the world's
farmland is
organic

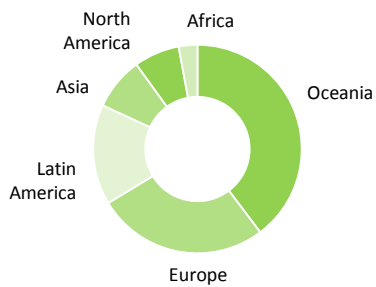
+300%
since 1999

In Oceania there were 17.3 Mio ha, in Europe 11.6 Mio ha, and in Latin America 6.8 Mio ha.

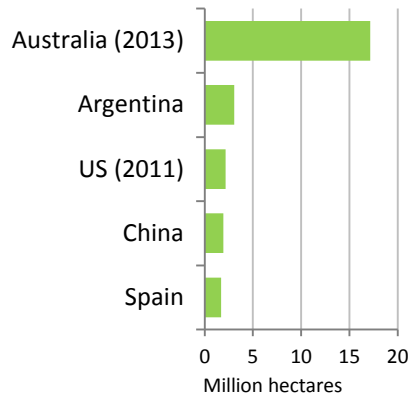
The ten countries with the largest organic agricultural areas have combined 73% of the world's organic agricultural land.

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

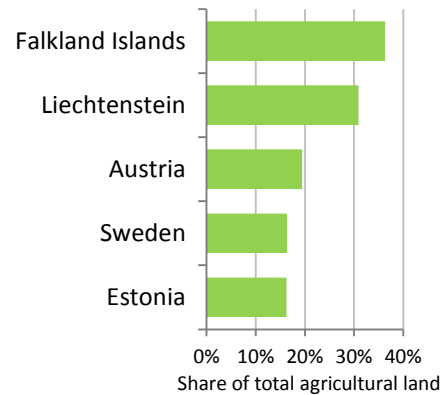
In 2014, almost 500'000 hectares were reported compared with 2013.



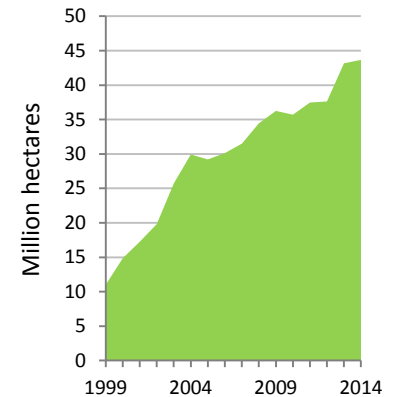
Distribution of organic agricultural land by region 2014



The five countries with the largest areas of organic agricultural land 2014



Countries top five with more than 10 percent of organic agricultural land 2014

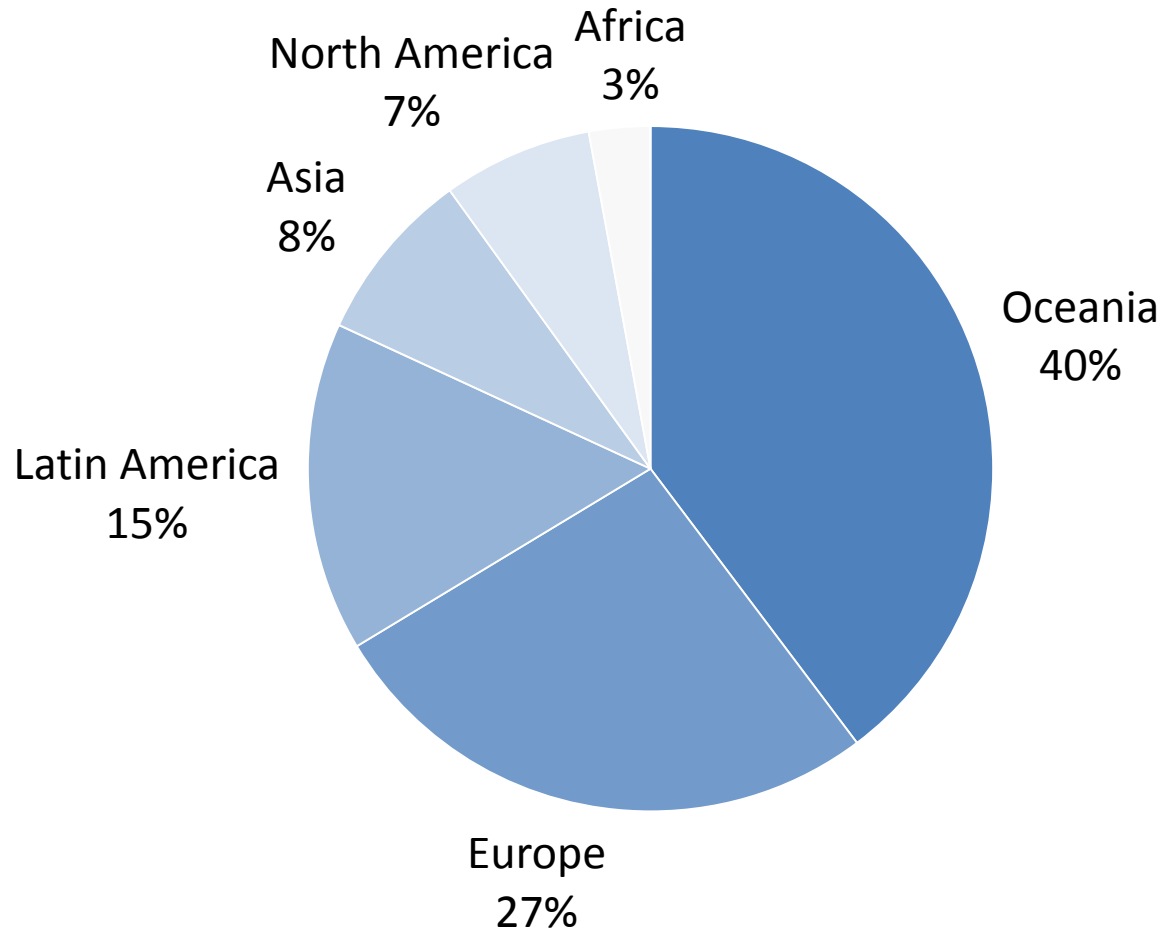


Growth of the organic agricultural land 1999-2014

World: Organic agricultural land by region 2014

Distribution of organic agricultural land by region 2014

Source: FiBL Survey 2016



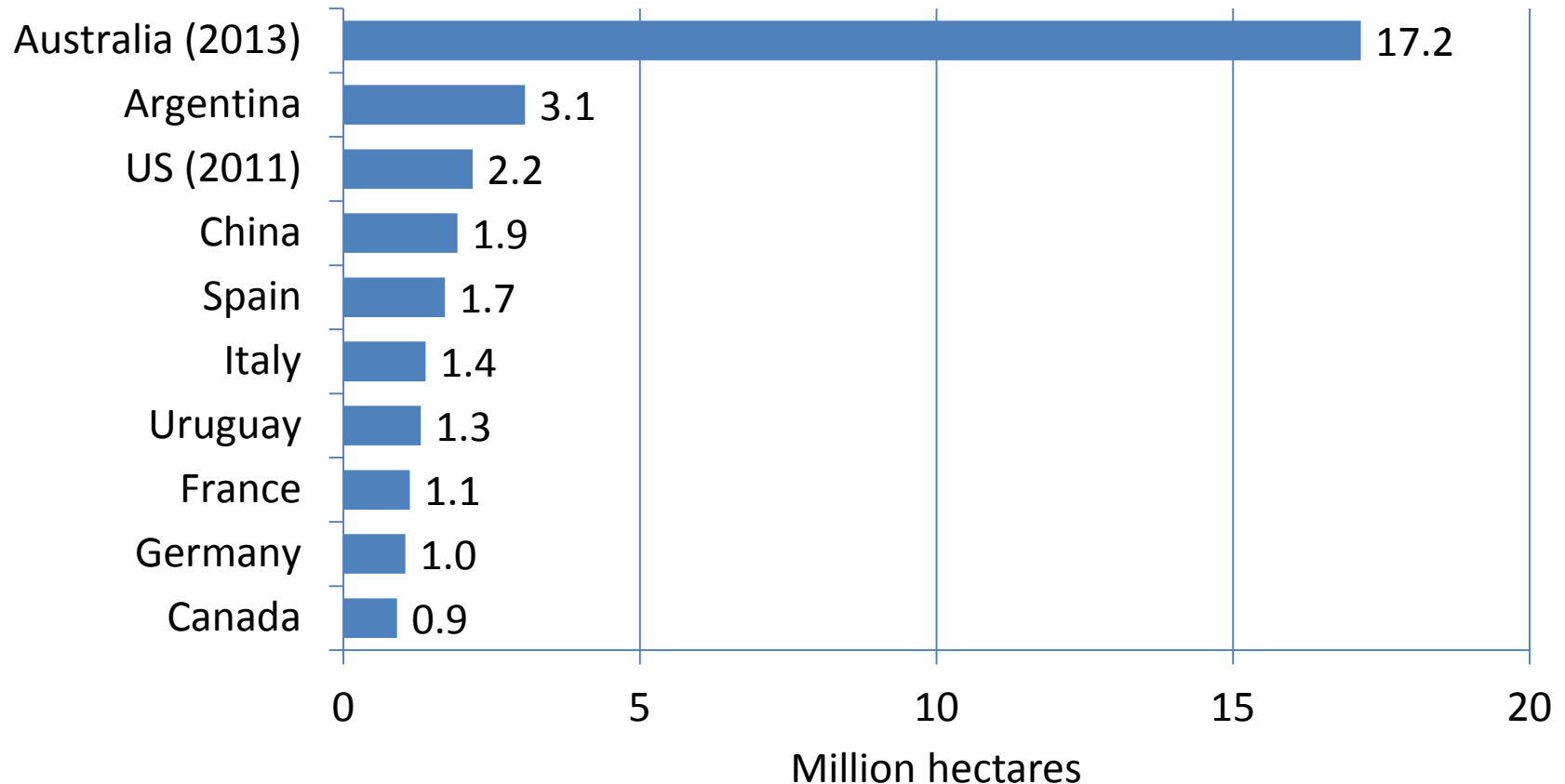
World: The countries with the most organic agricultural land 2014

- › Australia is the country with the most organic agricultural land, 97 percent of which is 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 31.8 million hectares, constituting more than seventy percent of the world's organic agricultural land.

World: Organic agricultural land 2014: Top ten countries

The ten countries with the largest areas of organic agricultural land 2014

Source: FiBL survey 2016



World: Share of organic land of total agricultural area 2014

- › The share of the world's organic agricultural of all agricultural land is 0.99 percent.
- › By region, the share is highest in Oceania (4.1 percent), followed by Europe with 2.4 percent and Latin America with 1.1 percent.
- › In the 27 countries of the European Union, the share of organically managed land is 5.7 percent. In the other regions, the share of organically managed land is less than one percent.
- › Eleven countries have more than 10 percent organic land and 15 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 the Falkland Islands (Malvinas), where several large sheep farms are working organically, followed by Liechtenstein (30.9 percent) and Austria (19.4 percent).
- › It is interesting to note that many island states have high shares.

World: Shares of organic agricultural land by region 2014

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land by region 2014

Region	Organic agr. land [ha]	Share of total agri. land*
Africa	1'263'105	0.1%
Asia	3'567'474	0.3%
Europe	11'625'001	2.4%
Latin America	6'785'796	1.1%
North America	3'082'419	0.8%
Oceania	17'342'416	4.1%
Total**	43'662'446	1.0%

Source: FiBL survey 2016.

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

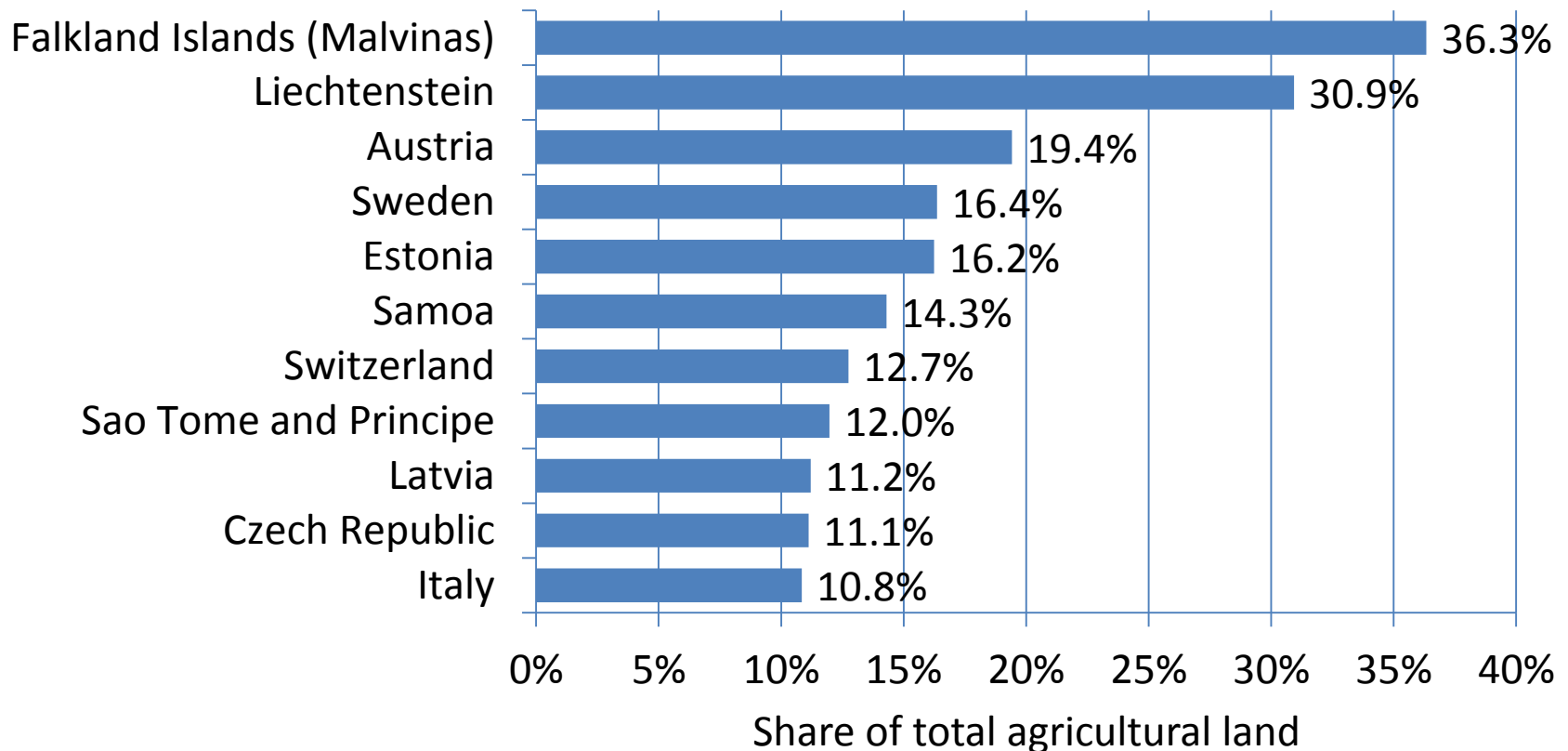
** Total includes correction value for French overseas departments.

(European Union: 5.7 %)

World: The highest shares of organic agricultural land 2014

Countries with more than 10 percent of organic agricultural land 2014

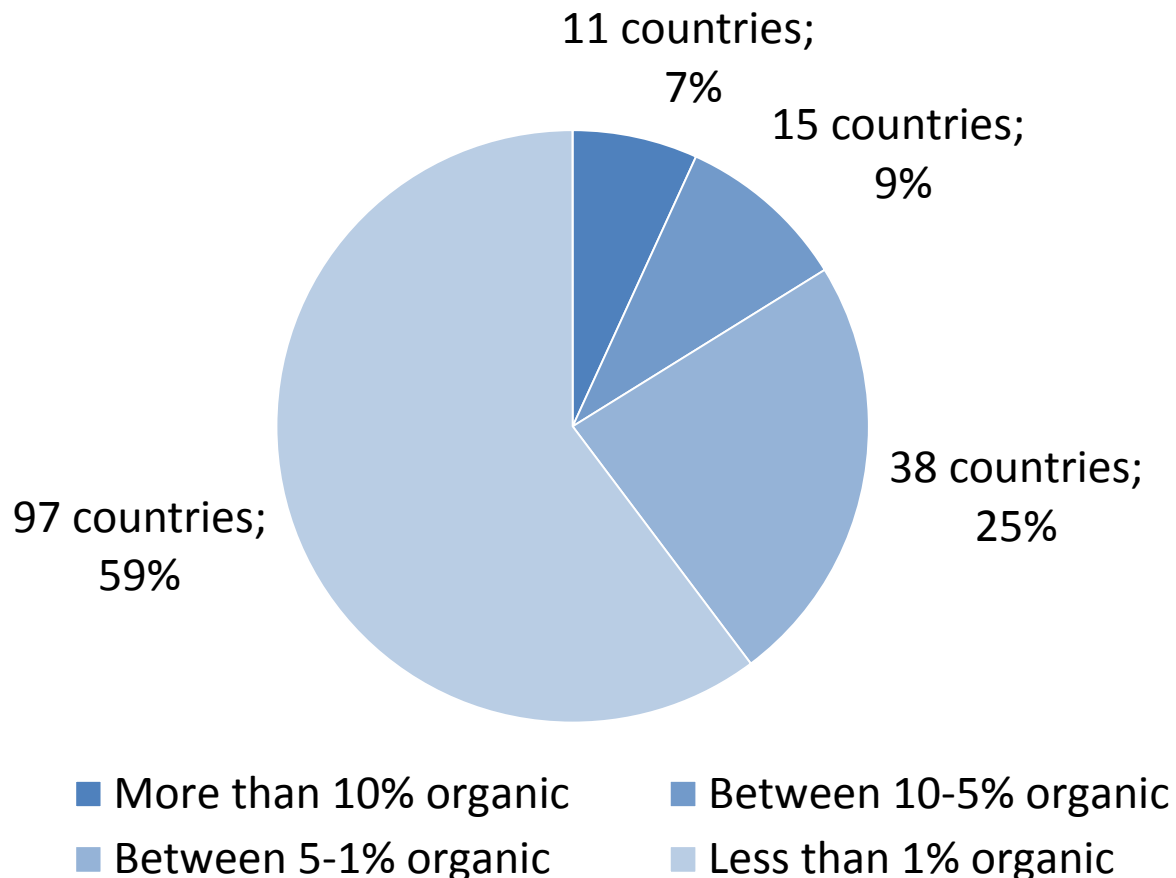
Source: FiBL survey 2016



World: Distribution of organic shares 2014

Distribution of the organic shares of the agricultural land 2014

Source: FiBL Survey 2016



World: Growth of the organic agricultural land 2014

- › Compared with the revised data from 2013, the organic agricultural land has increased by 1.2 percent in 2014, almost 0.5 million hectares.
- › Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has almost quadrupled.
- › Sixty-nine countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 47 countries. In 49 countries, the organic agricultural area either did not change or no new data was received. The largest increases of organic agricultural land were in Nigeria, Myanmar, Tonga, and Malta.

World: Growth of the organic agricultural land 2013-2014 by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2013/2014

Region	Organic agr. land [ha] 2013	Organic agr. land [ha] 2014	+/- hectares	+/- percent %
Africa	1'208'825	1'263'105	+54'280	+4.5%
Asia	3'408'912	3'567'474	+158'563	+4.7%
Europe	11'365'411	11'625'001	+259'590	+2.3%
Latin America	6'814'030	6'785'796	-28'234	-0.4%
North America	3'047'710	3'082'419	+34'710	+1.1%
Oceania	17'321'733	17'342'416	+20'683	+0.1%
Total**	43'162'855	43'662'446	+499'591	+1.2%

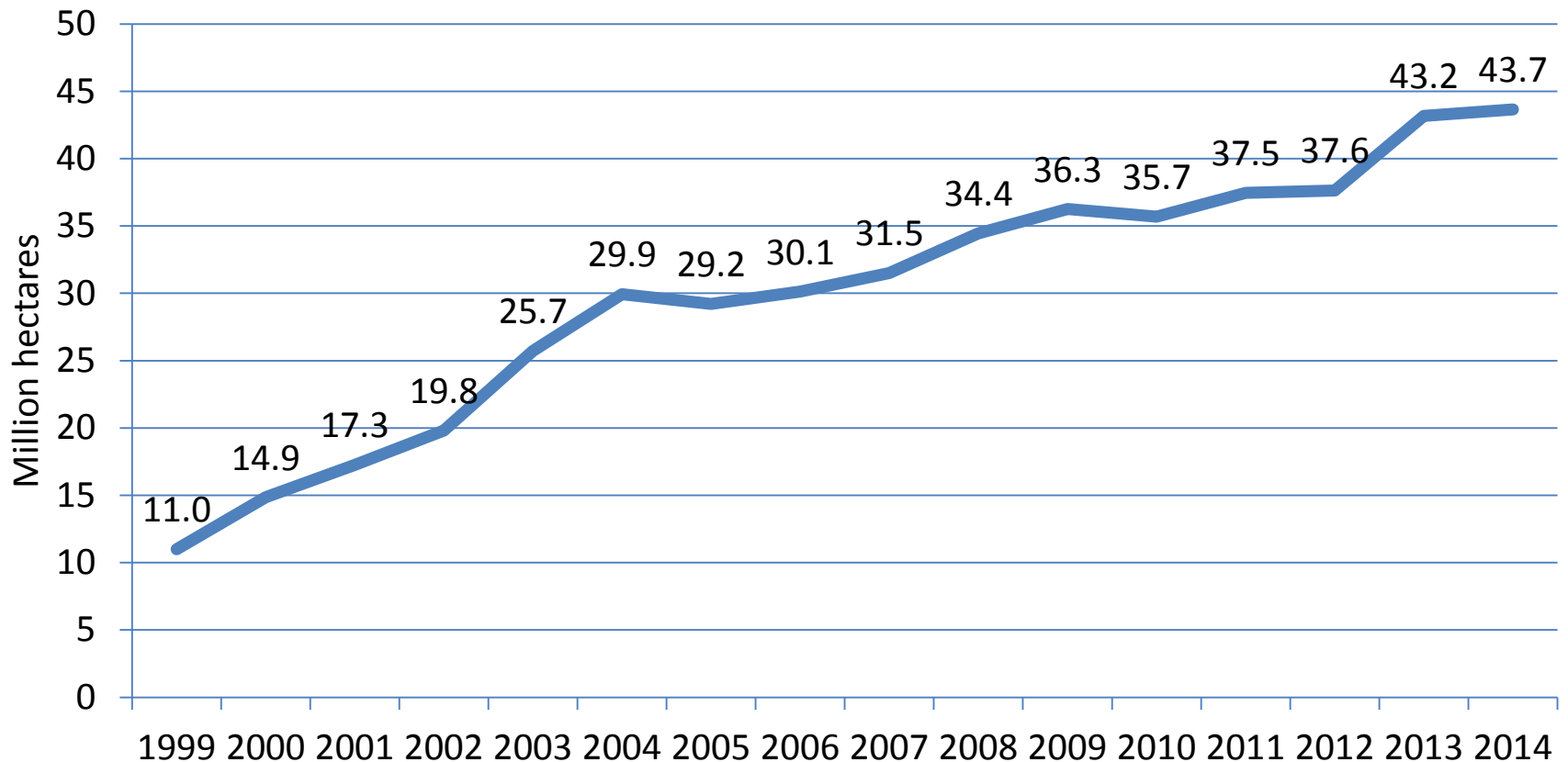
Source: FiBL survey 2016, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

** Total includes correction value for French Overseas Departments.

World: Growth of the organic farmland 1999-2014

Growth of the organic agricultural land 1999-2014

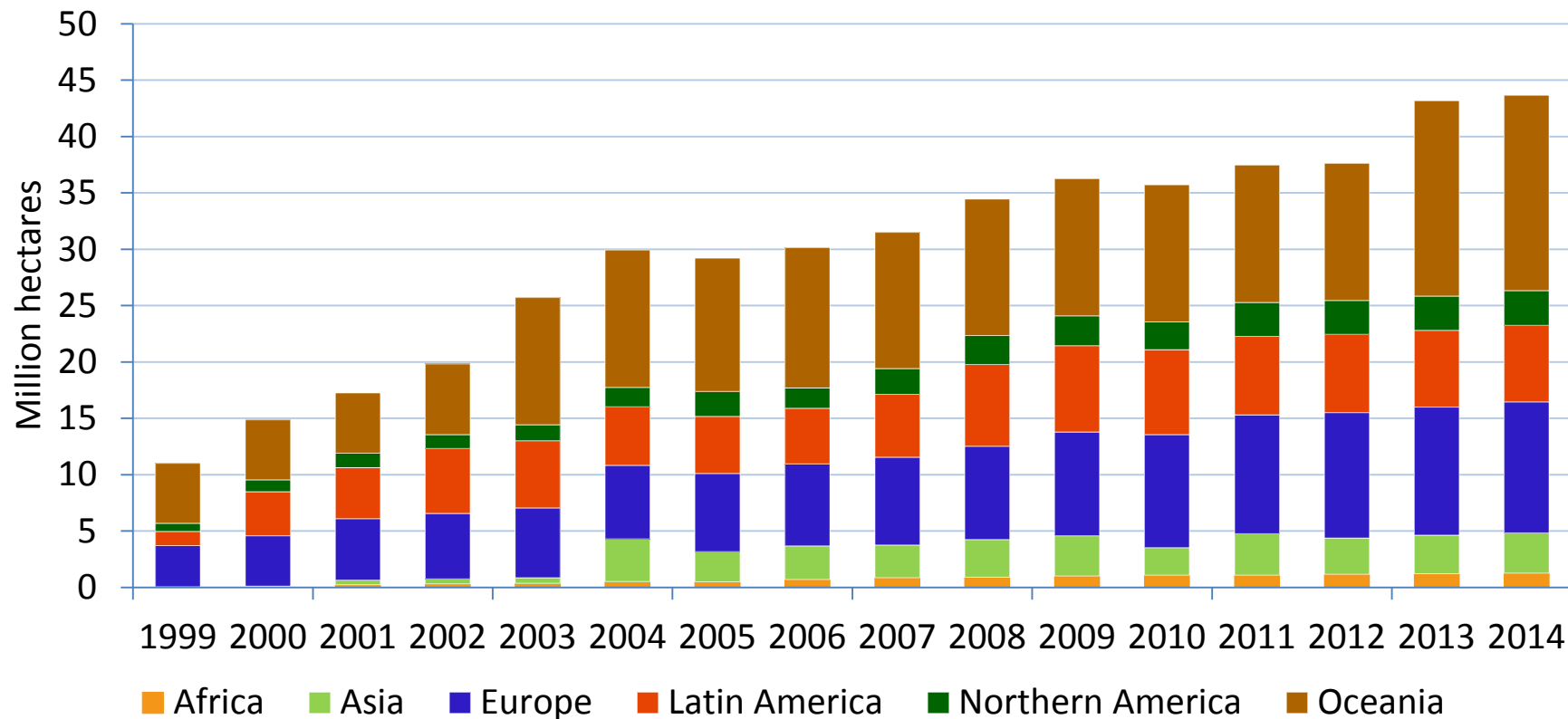
Source: FiBL-IFOAM-SOEL-Surveys 1999-2016



World: Development of organic agricultural land in the regions

Development of organic agricultural land in the regions 1999-2014

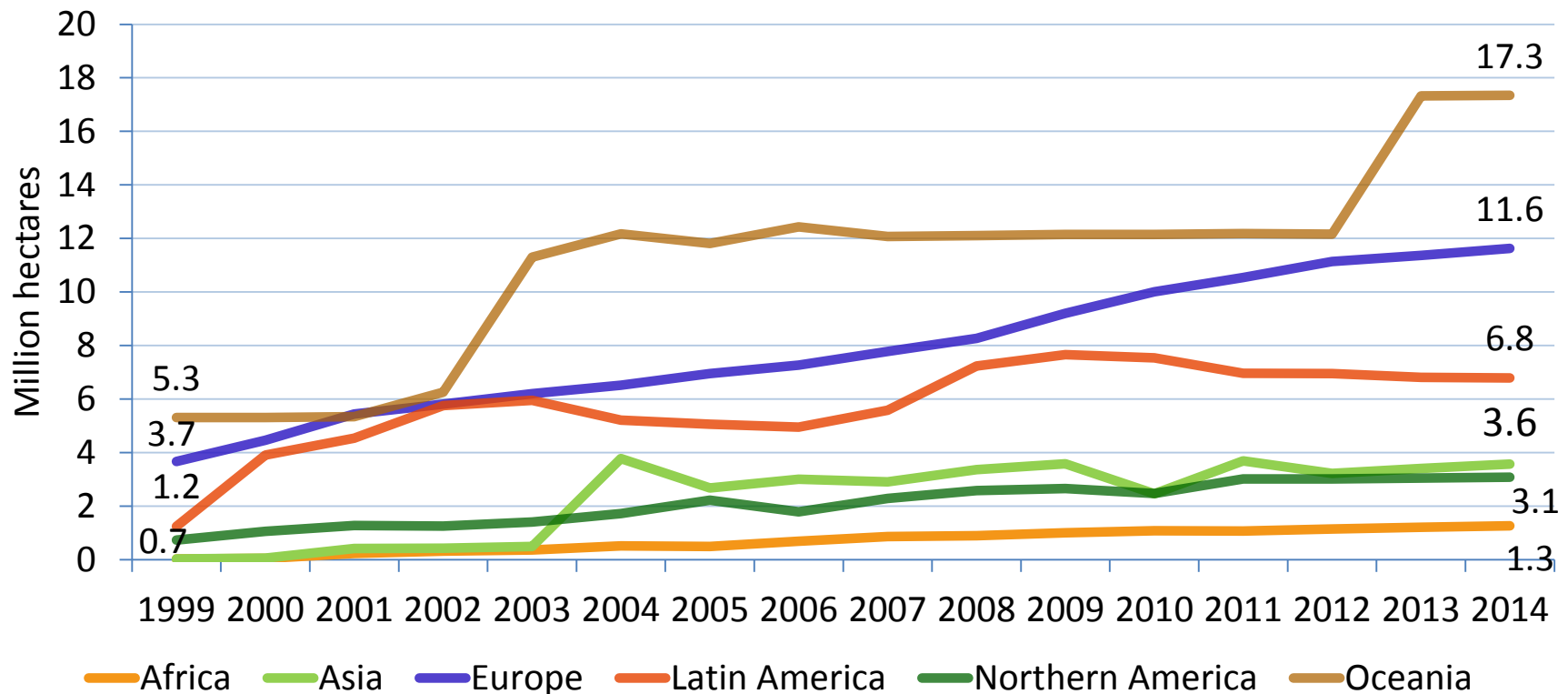
Source: FiBL-IFOAM-SOEL-Surveys 1999-2016



World: Growth of organic agricultural land by region 2014

Growth of the organic agricultural land by continent 1999-2014

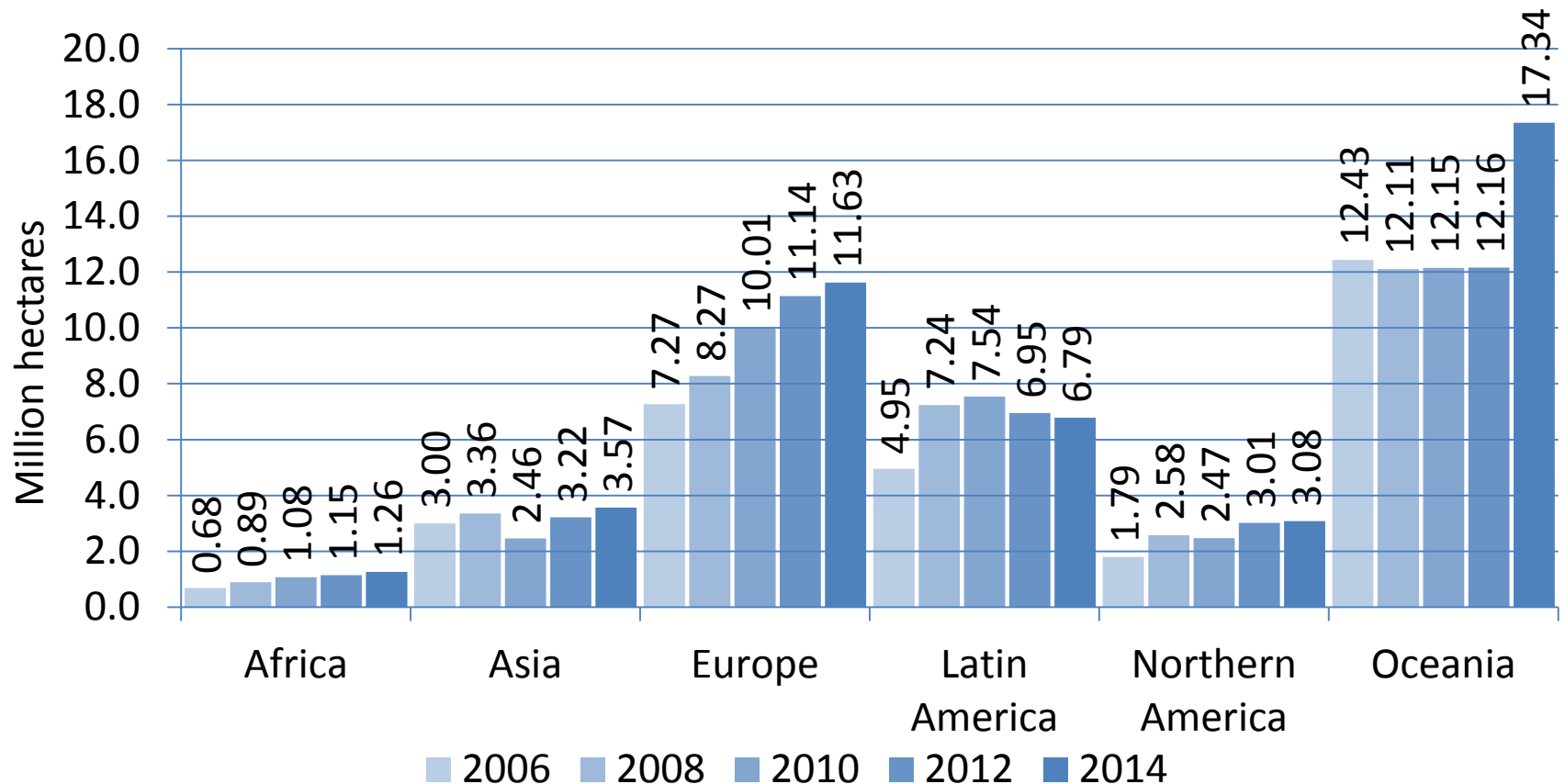
Source: FiBL-IFOAM-SOEL-Surveys 1999-2016



World: Growth of organic farmland by continent 2014

Growth of the organic agricultural land by continent 2006-2014

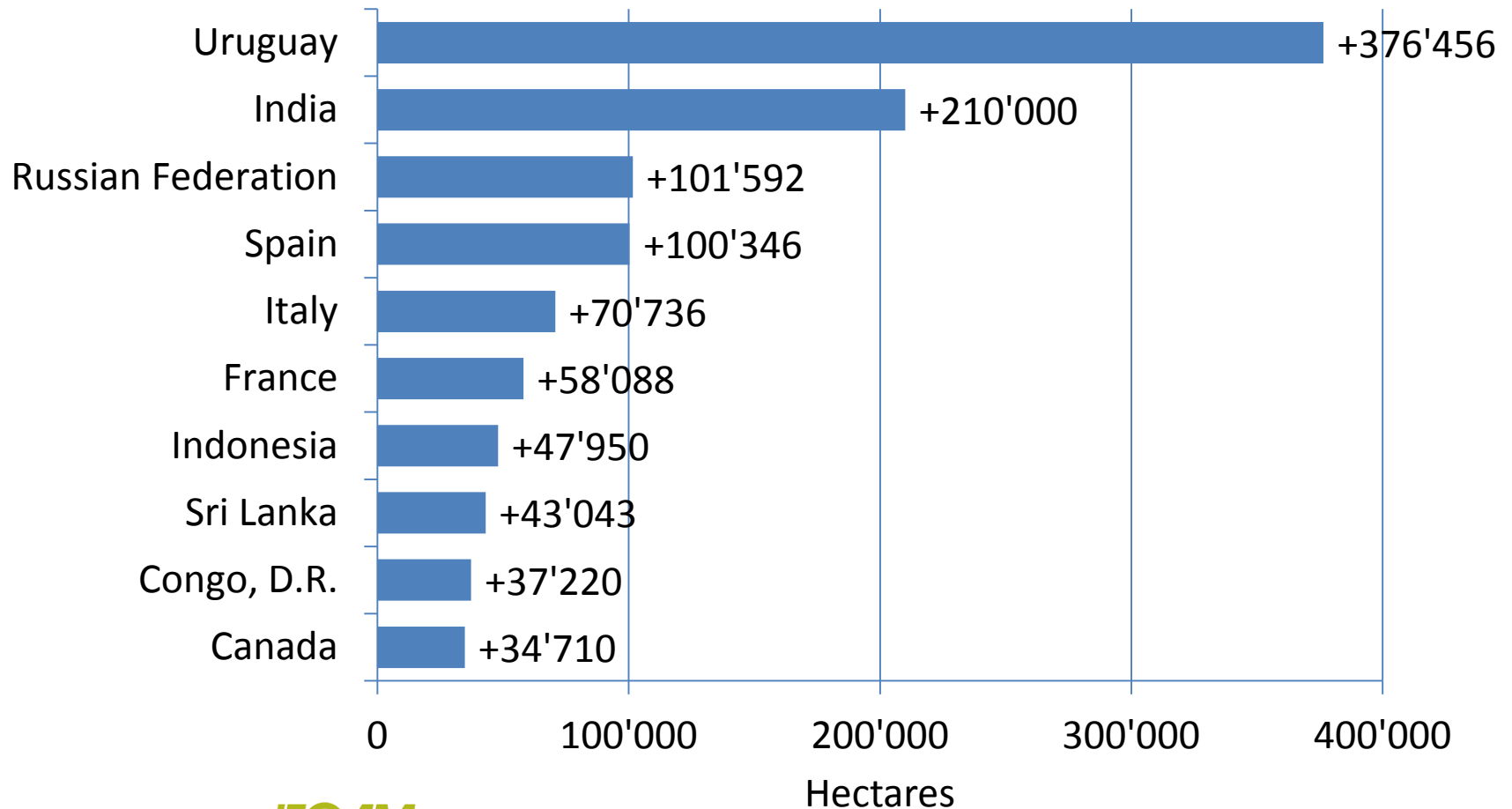
Source: FiBL-IFOAM survey 2008-2016



World: Growth of organic farmland 2013-2014

The ten countries with the highest increase of organic land 2014

Source: FiBL survey 2016



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 37.5 million hectares.
- › In total, 81.2 million hectares – agricultural land and other areas – were organic in 2014.

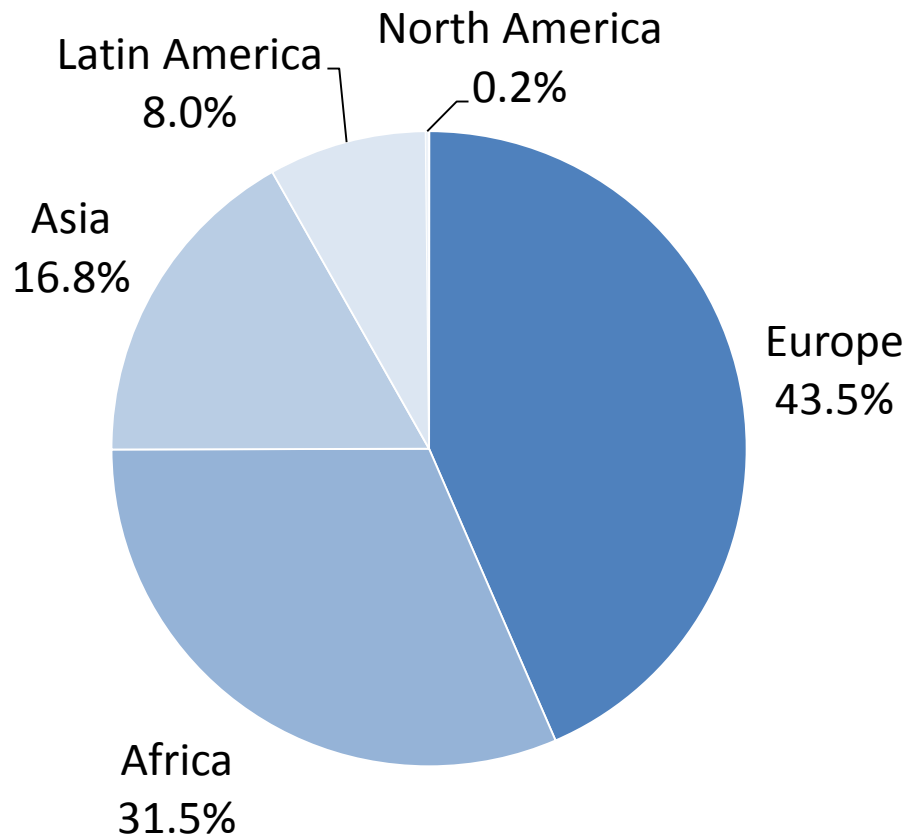
World: Wild collection and beekeeping areas

- › 37.4 million hectares of wild collection and bee-keeping areas were reported for 2014.
- › 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 2014

Distribution of organic wild collection areas by region 2014

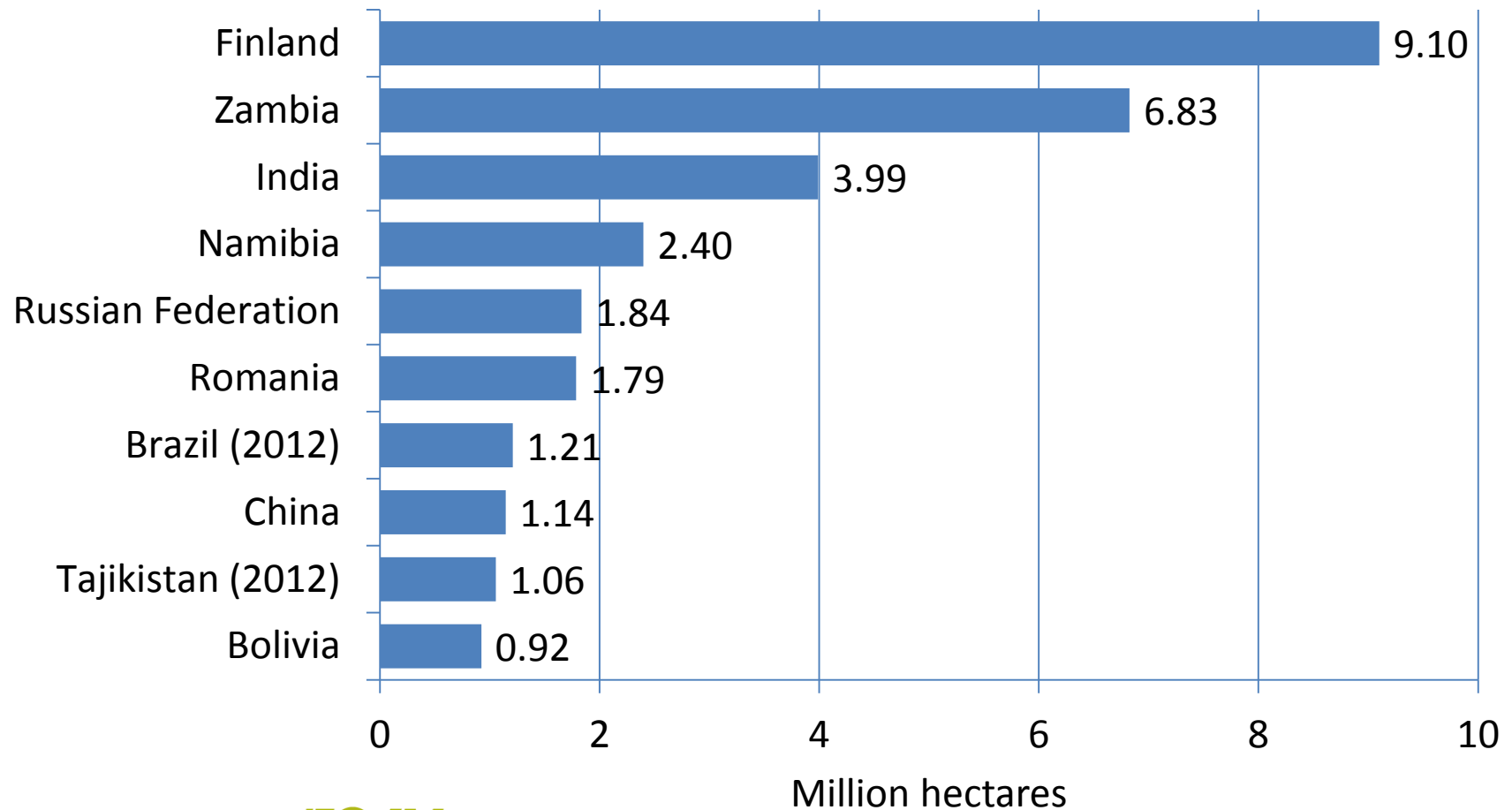
Source: FiBL survey 2016



World: Organic wild collection 2014: Top 10 countries

The ten countries with the largest wild collection areas 2014

Source: FiBL survey 2016



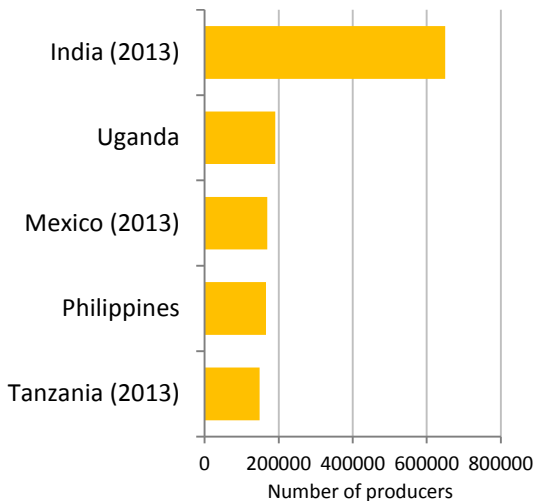
World: Organic producers 2014

- › For the current survey, a total of 2.3 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 (650'000, 2013), followed by Uganda (190'552) and Mexico (169'703, 2013).
- › This is an increase of more than 260'000 producers compared with 2014, or 13.4 percent.
- › It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2.3 million.

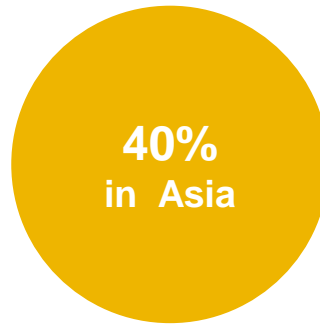
WORLD: ORGANIC PRODUCERS 2014



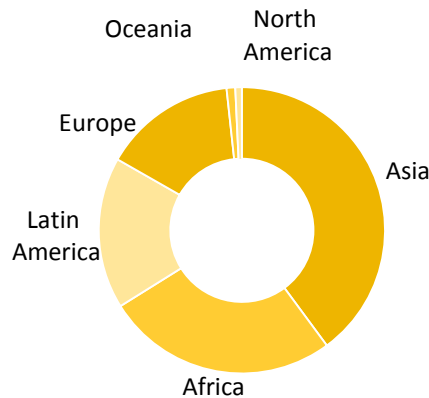
The country with the most organic producers is India, followed by Uganda and Mexico.



The five countries with the largest numbers of organic producers 2014



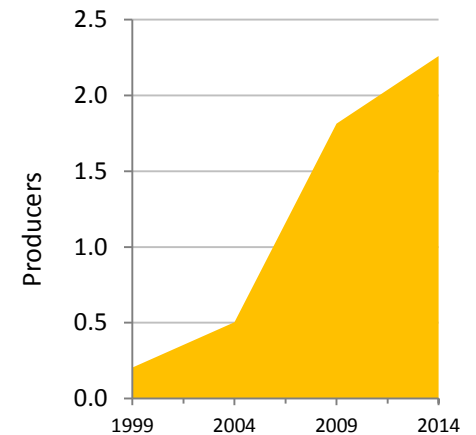
More than 75% of the producers are in Asia, Africa, and Latin America.



Distribution of organic producers by region 2014



There has been an increase in the number of producers by almost 270'000, or over 13%.

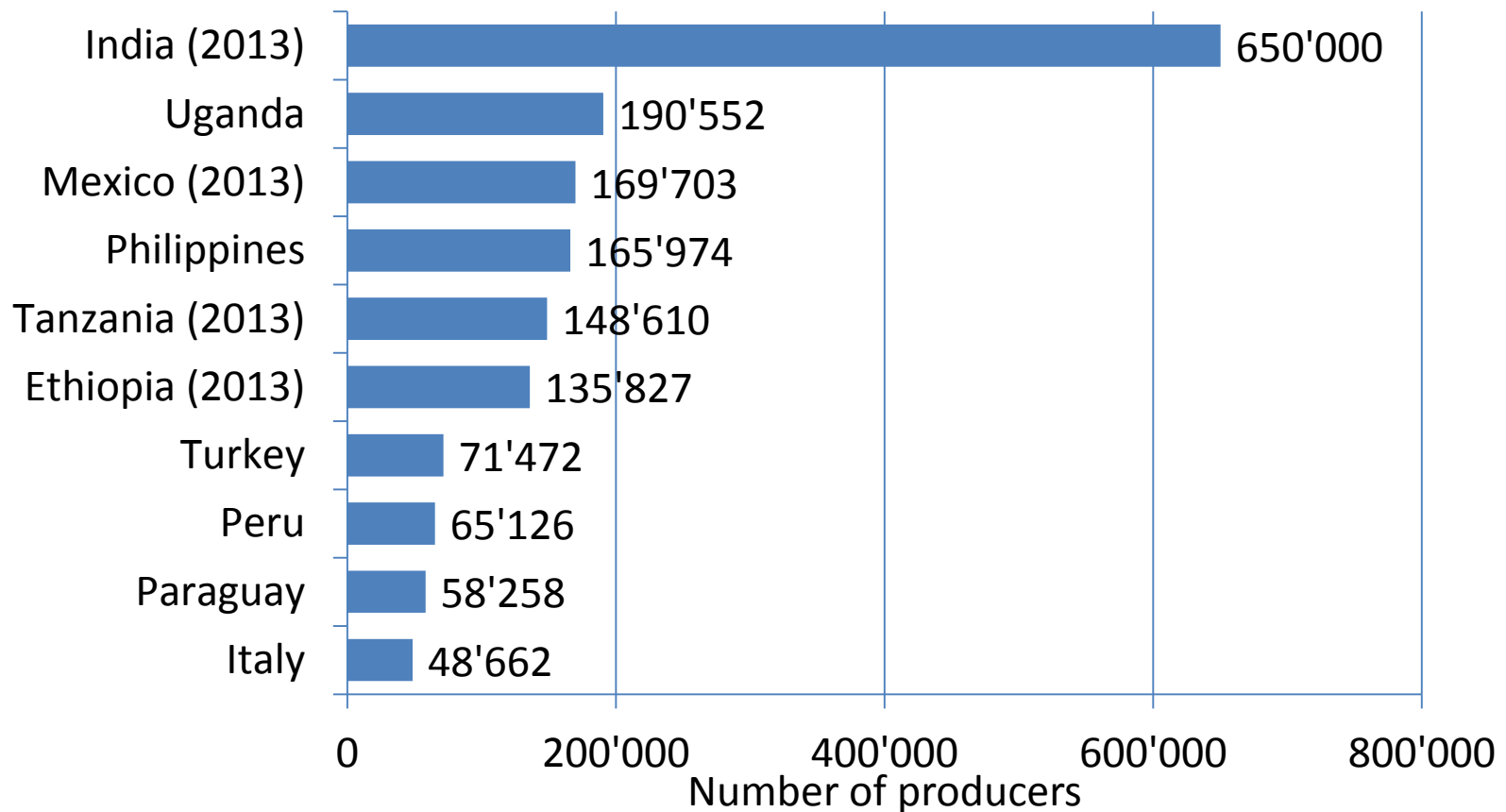


Development of the number of organic producers 1999-2014

World: Organic producers 2014

The ten countries with the largest numbers of organic producers 2014

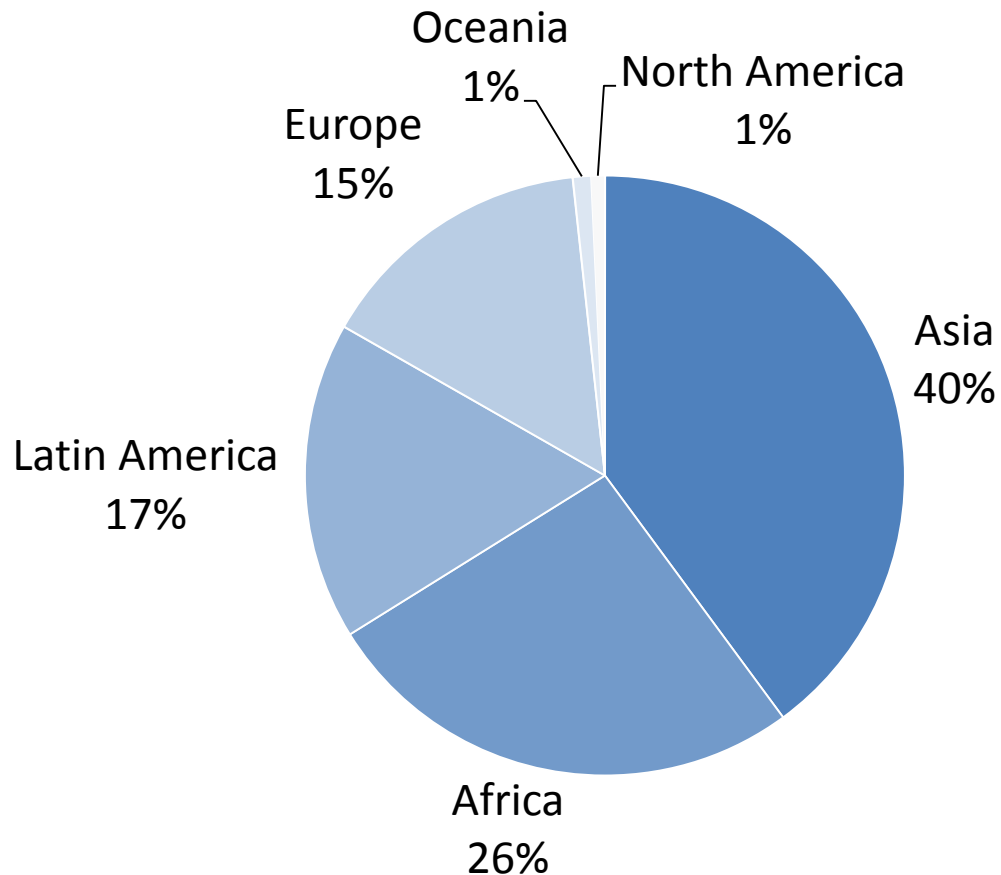
Source: FiBL survey 2016



World: Organic producers by region 2014

Organic producers by region 2014

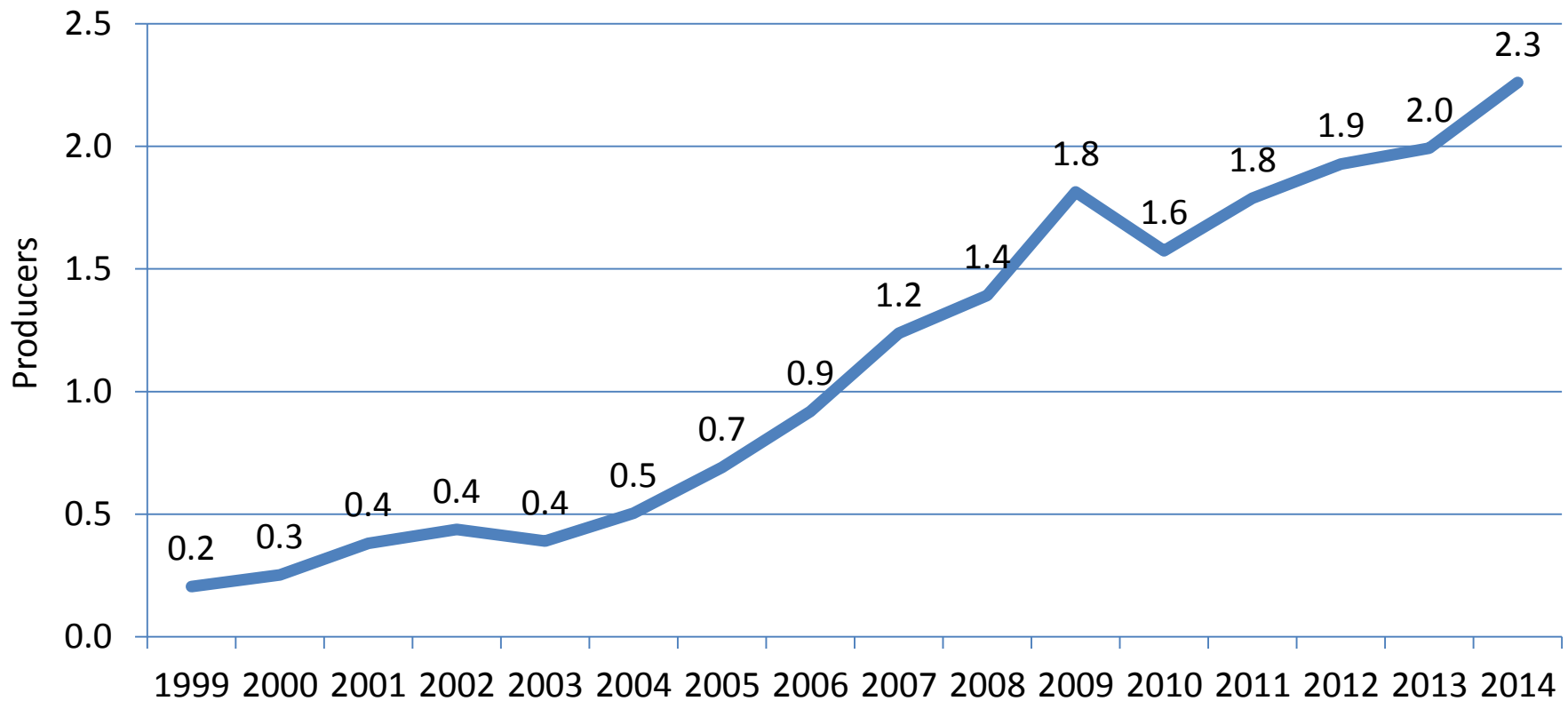
Source: FiBL Survey 2016



World: Development of organic producers 1999-2014

Development of the number of organic producers 1999-2014

Source: FiBL-IFOAM-SOEL-Surveys 1999-2016



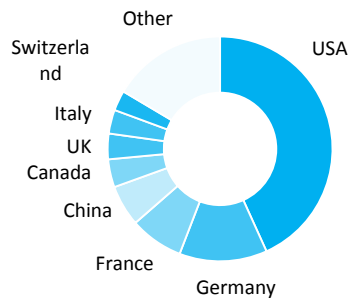
World: The global market for organic food and beverages 2014

- › In 2014, the global market for certified organic food and drink was estimated to be 80 billion US Dollars according to Organic Monitor (Sahota 2016).
- › The turnover with organic products has more than fivefold since 1999.
- › More than ninety percent of the organic product revenues is made in the North America and Europe (Sahota 2016).
- › In 2014, the by far largest market was the United States with 27.1 billion euros of organic food sales, followed by Germany with 7.9 billion euros and France with 4.8 billion euros (FiBL-AMI 2015).
- › The highest annual per capita consumption was in Switzerland (221 euros) and in Luxembourg (164 euros) (FiBL-AMI 2015).
- › Denmark, Switzerland and Austria have the highest share of organic food sales. In 2014 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 2014

Over
60 billion €

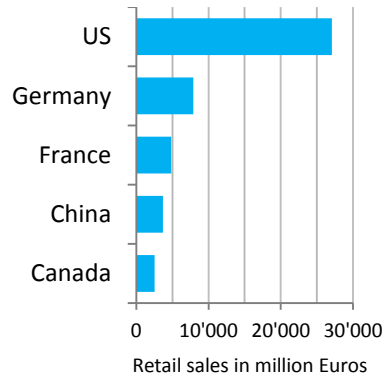
The largest single market is the US followed by the EU (23.9 billion €) and China. By region, North America has the lead (29.6 billion €), followed by Europe (26.2 billion €) and Asia.



Distribution of retail sales value by country 2014

North America
almost
30 billion €

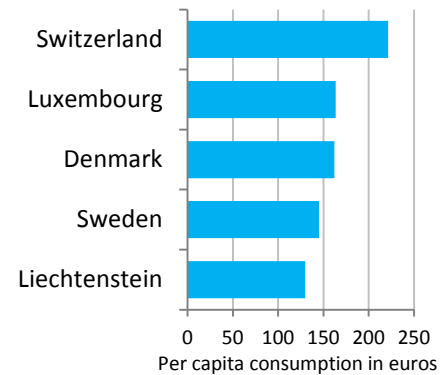
The countries with the largest market for organic food are the United States (27.1 billion €), followed by Germany (7.9 billion €), France (4.8 billion €) and China (3.7 billion €).



The five countries with the largest markets for organic food 2014

221€
are spent per
person in
Switzerland

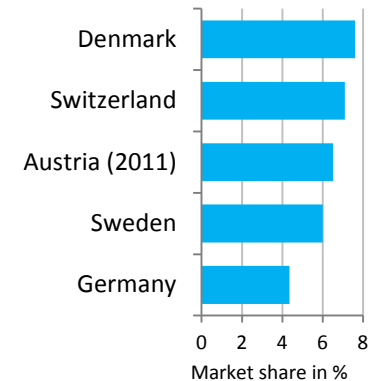
Switzerland has the highest per capita consumption worldwide, followed by Luxembourg, and Denmark.



The five countries with the highest per capita consumption 2014

7.6%
of the
food market
in Denmark
is organic

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

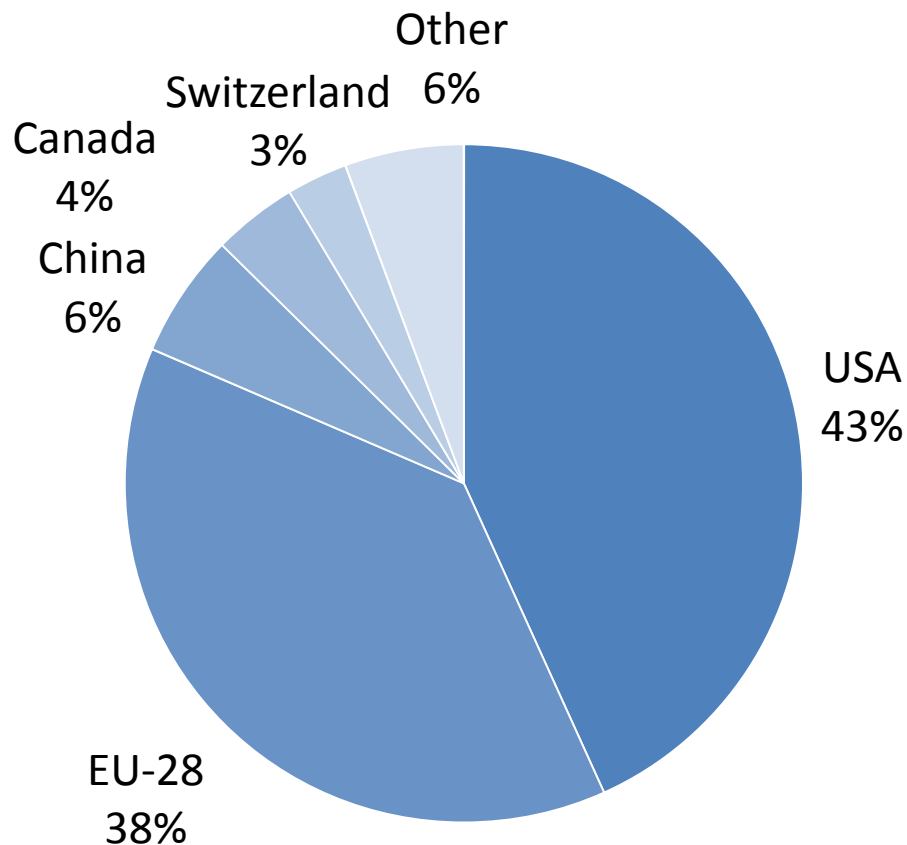


The five countries with the highest organic shares of the total market 2014

World: Global market: Distribution of retail sales by single market 2014

World: distribution of retail sales by single market 2014

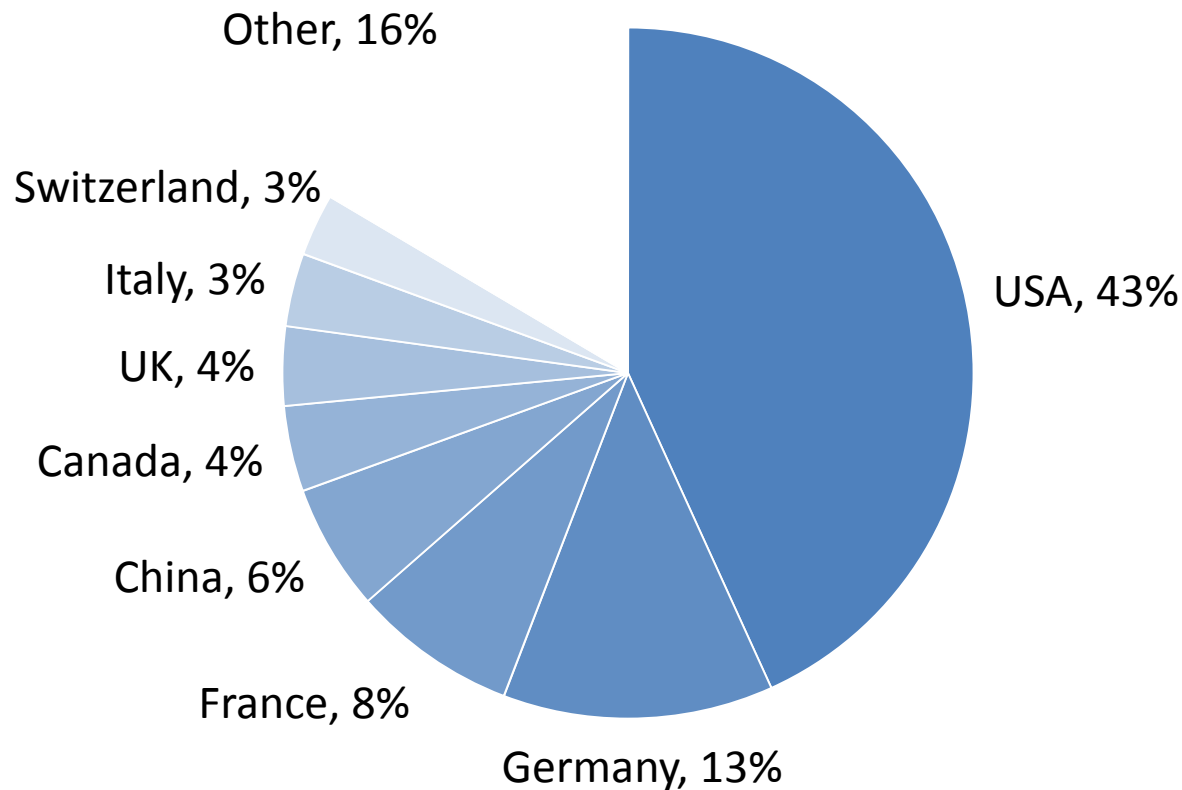
Source: FiBL-AMI survey 2016



World: Distribution of organic retail sales 2014

Global market: Distribution of retail sales value by country 2014

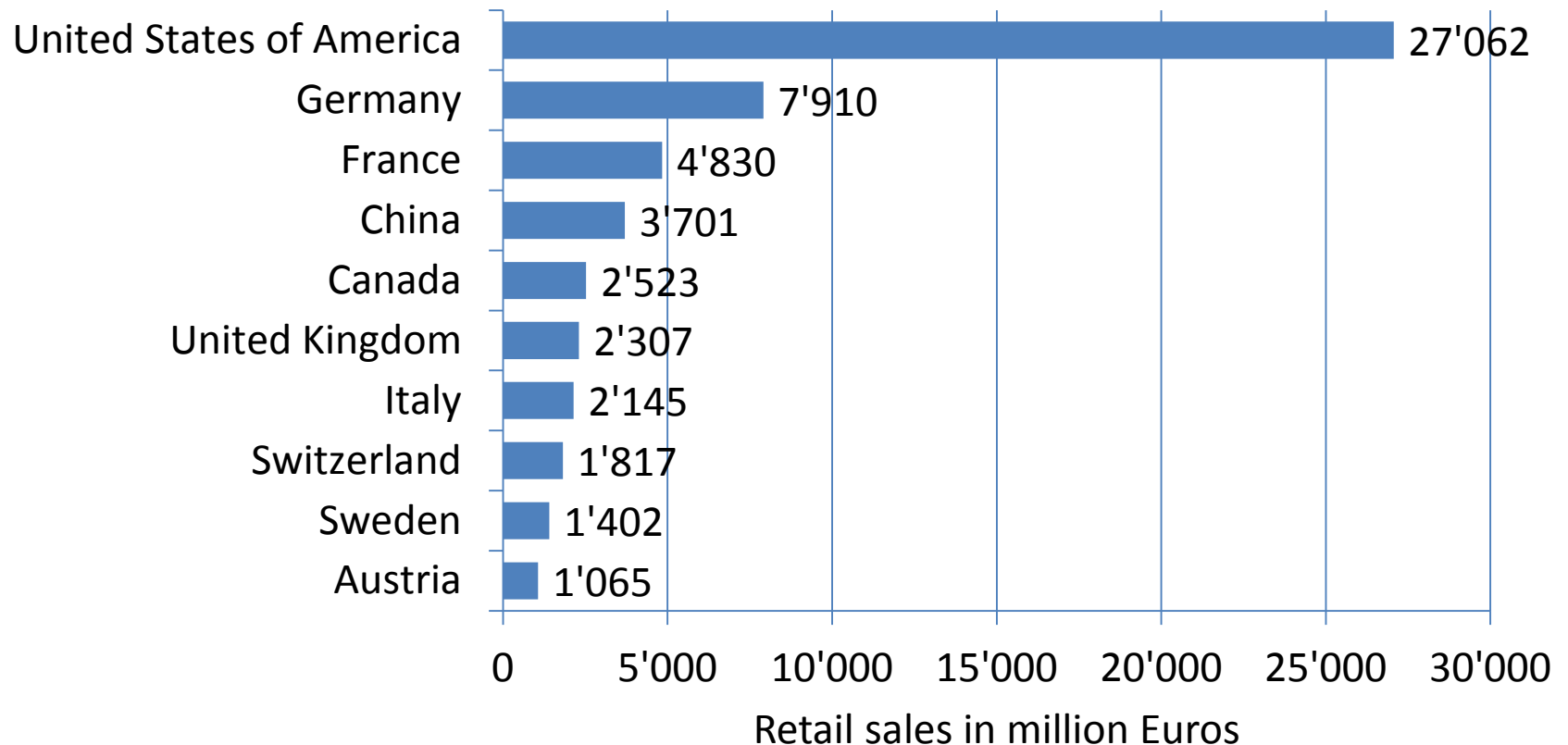
Source: FiBL-AMI survey 2016, based on retail sales with organic food



World: The largest markets for organic food 2014

The ten countries with the largest markets for organic food 2014

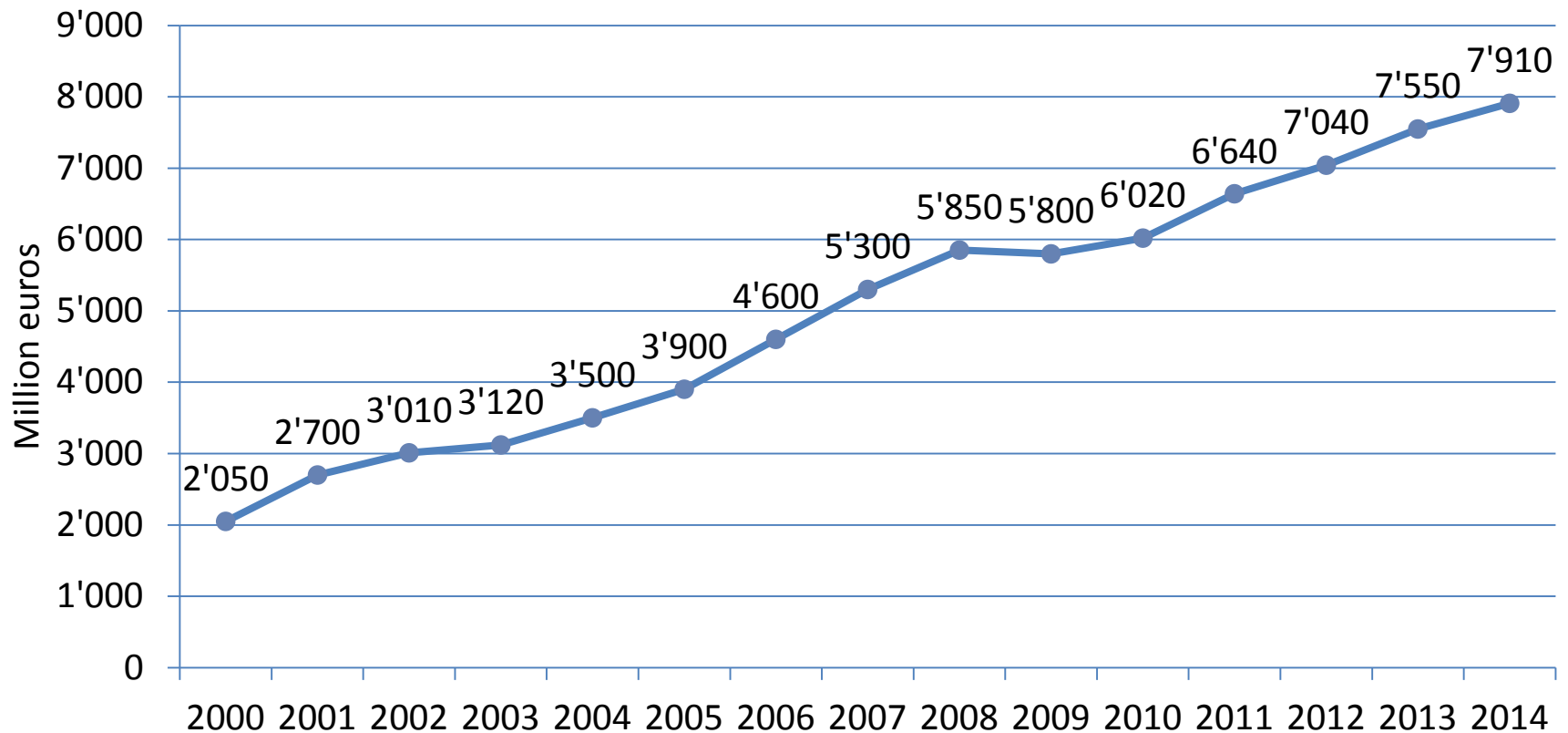
Source: FiBL-AMI survey 2016



Germany: Growth of retail sales in Germany 2000-2014

Germany: Growth of organic food and beverages retail sales 2000-2014

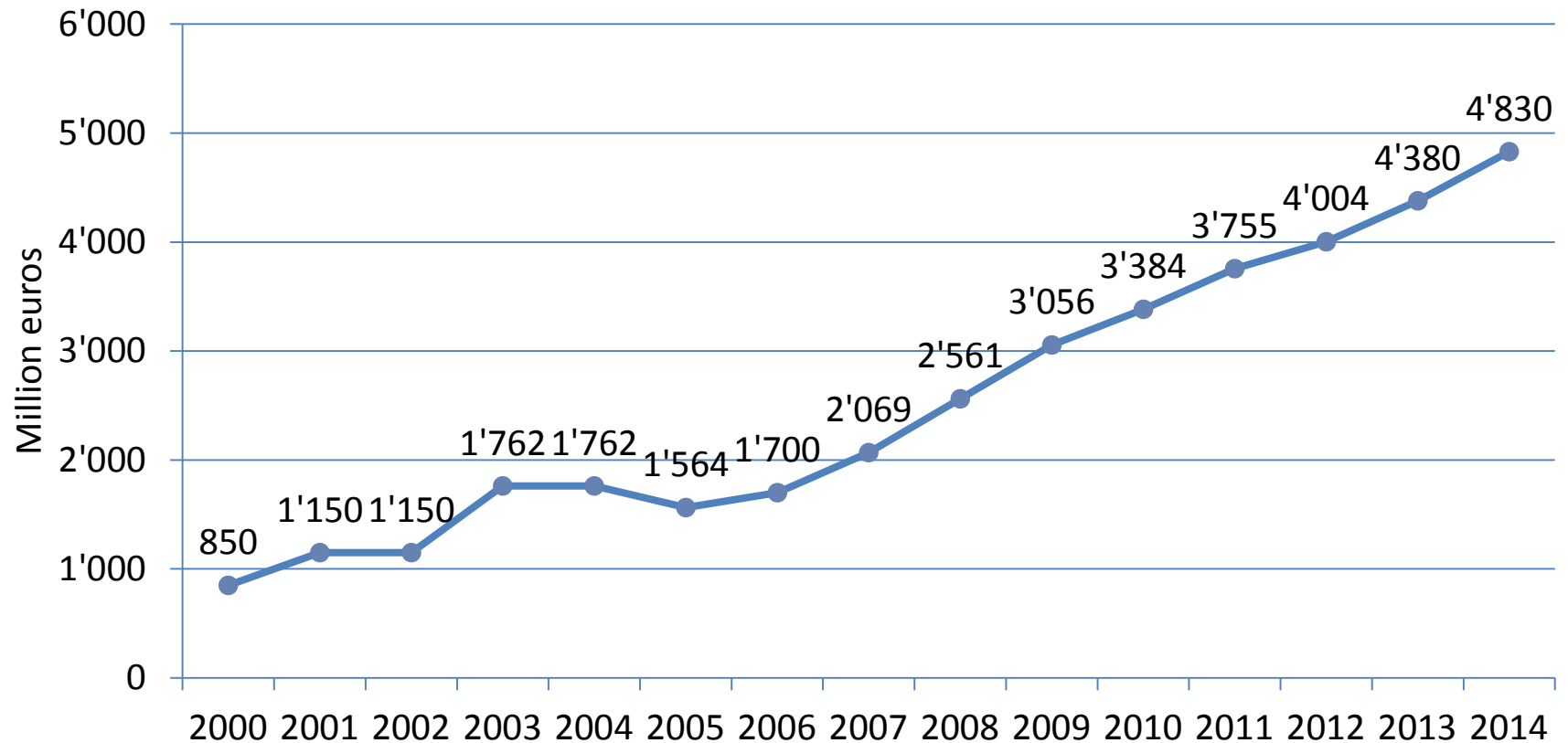
Source: FiBL-AMI surveys 2000-2016



France: Growth of retail sales in France 2000-2014

France: Growth of organic food and beverages retail sales 2000-2014

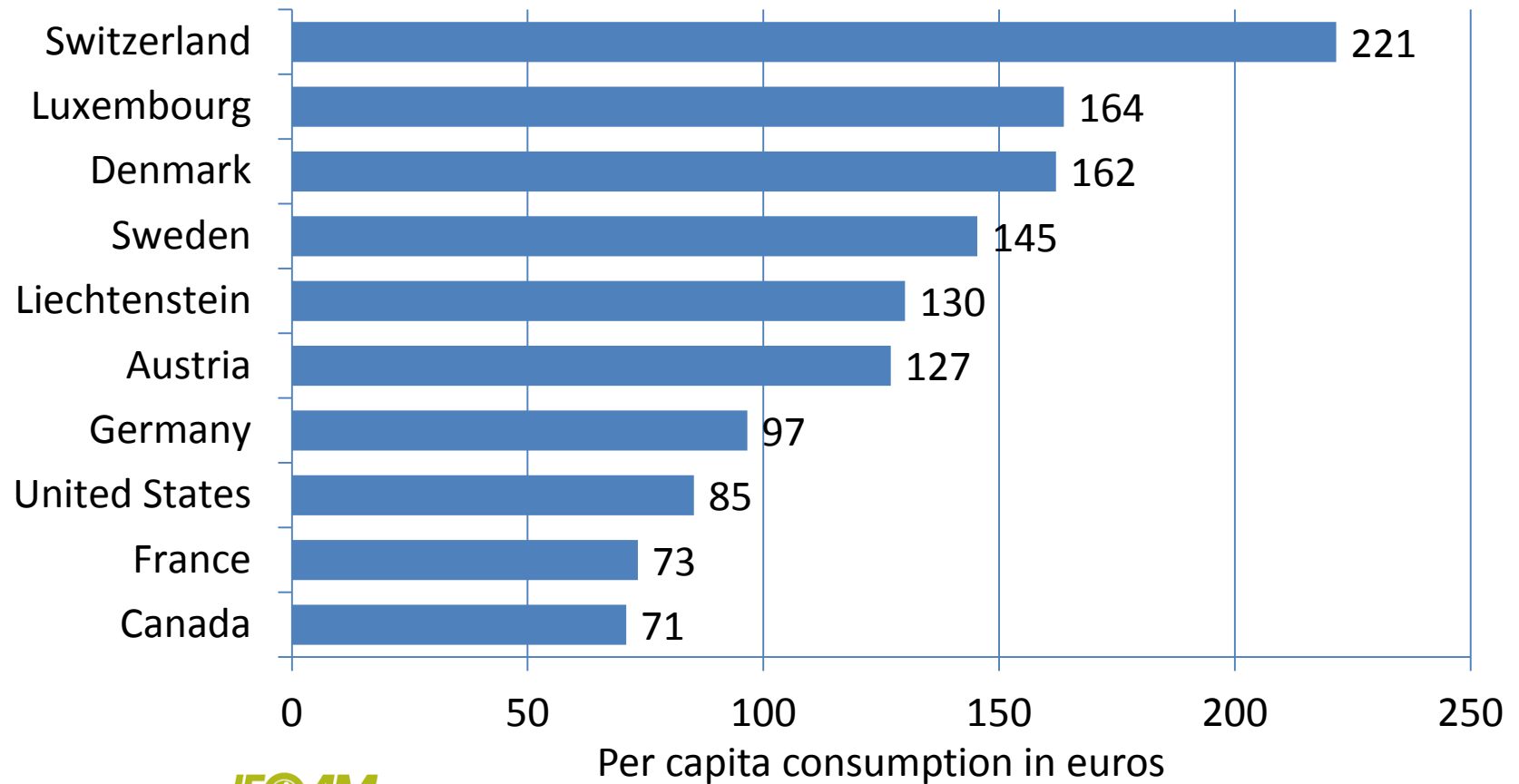
Source: FiBL-AMI surveys 2000-2016



World: Per capita consumption 2014

The ten countries with the highest per capita consumption 2014

Source: FiBL-AMI survey 2016



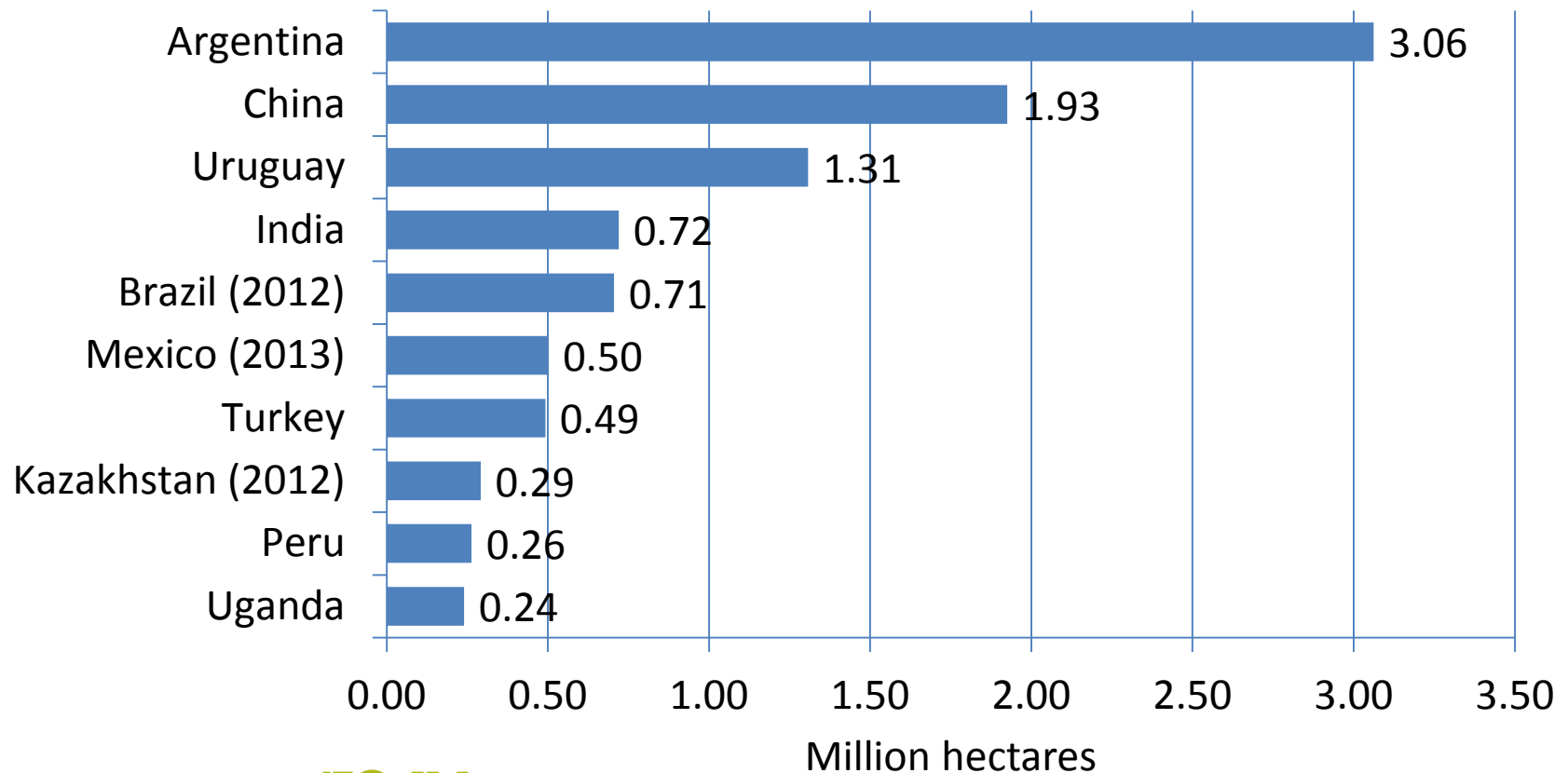
World: Organic farming in developing and transition countries 2014

- › 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 2014

The ten countries on the DAC list with the largest areas of organic agricultural land 2014

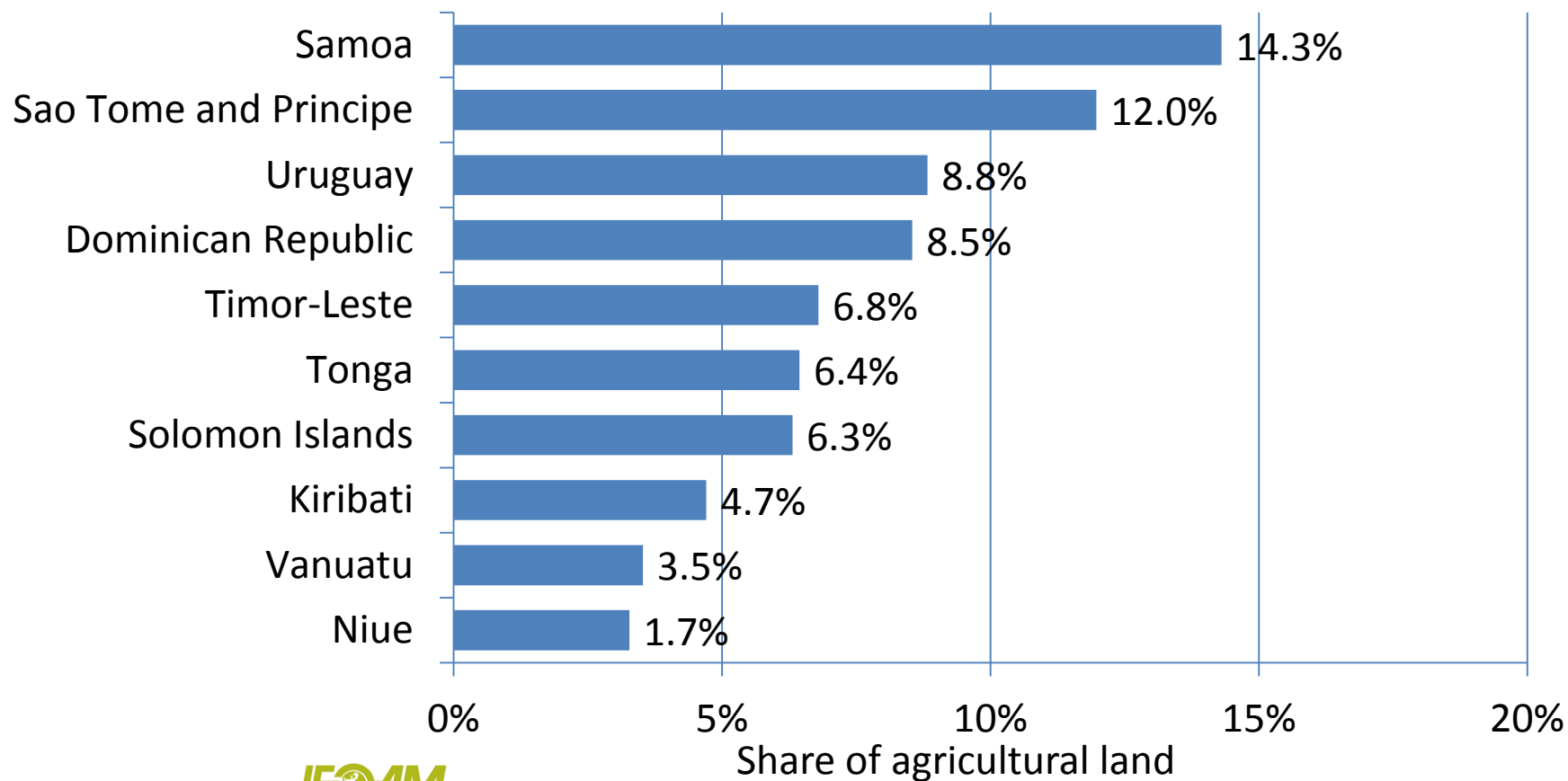
Source: FiBL survey 2016



World: DAC list: The top 10 countries with the highest shares of organic agricultural land 2014

The ten countries on the DAC list with the highest shares of organic agricultural land 2014

Source: FiBL survey 2016



More information

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