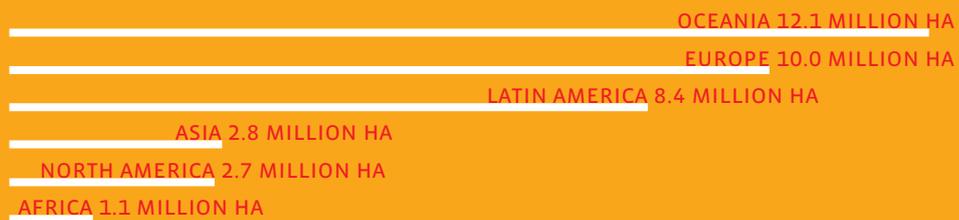




FiBL AND IFOAM

THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2012



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AFRICAN ORGANIC AGRICULTURE TRAINING MANUAL



Since 2009, the Research Institute of Organic Agriculture (FiBL) in collaboration with the International Federation of Organic Agriculture Movements (IFOAM) and African national organic agriculture movements have been collecting and evaluating information on organic and other sustainable farming practices in Africa. Together, they have now developed a training manual and corresponding training tools.

The African Organic Agriculture Training Manual aims to encourage the implementation of organic and other sustainable farming practices, increase market access for farmers, and improve food security throughout Africa. The training materials are designed for farmers, extension workers and trainers.

The training materials include:

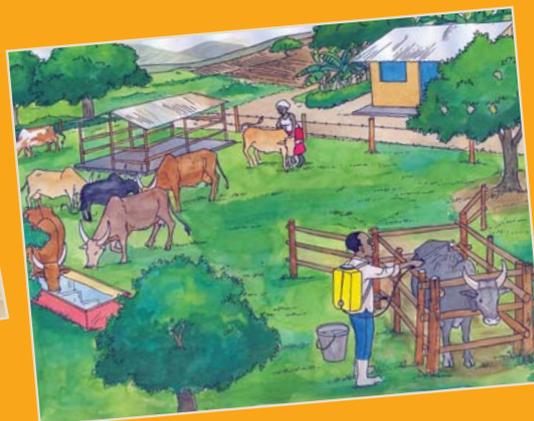
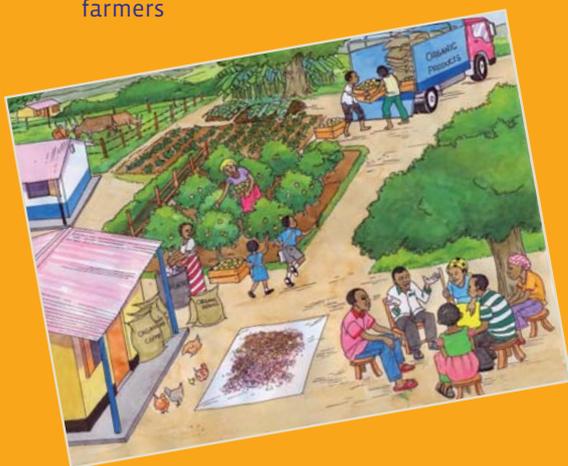
- > A guide with technical and didactical information
- > Illustrated presentation materials
- > Illustrated factsheets and booklets for farmers

FiBL plans to add training videos, posters and scripts for radio programs.

Version 1.0 of the training materials is available for free download at www.organic-africa.net. This website also provides a directory of organic agriculture in Africa, containing useful addresses and resource materials for farmers and trainers.

African organizations are now testing the material over a two-year period. FiBL will continually improve the manual based on their feedback.

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FiBL and IFOAM

**The World of
Organic Agriculture
Statistics and Emerging Trends 2012**

**For supplementary material see
<http://www.organic-world.net/yearbook-2012.html>**

All of the statements and results contained in this book have been compiled by the authors and are to the best of their knowledge correct and have also been checked by the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM). However, the possibility of mistakes cannot be ruled out entirely. Therefore, the editors, authors and publishers are not subject to any obligation and make no guarantees whatsoever regarding any of the statements or results in this work; neither do they accept responsibility or liability for any possible mistakes, nor for any consequences of actions taken by readers based on statements or advice contained therein.

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Foreword from ITC and SECO

Global data on organic production and market are of high relevance for policy makers and are an important decision tool and also a tool to understand the importance of organic farming in the individual countries.

Organic agriculture is a way of farming sustainably and offers innovative, low cost production techniques to increase productivity and resilience sustainably. At the same time, it links farmers with value-added output markets. By providing dynamic and easy access to organic market and production data, SECO and ITC aim to support decision-makers in governmental administration, development agencies, NGOs and other actors of the international organic industry.

Under this project, FiBL, in partnership with ITC, established a new database. The database now holds data on all variables that are of relevance to organic farming. This includes the number of farms and certified land, land use, crops, and yields as well as domestic, import, and export market volumes and values.

An important benefit of this project is providing policy makers with credible information on the state of organic production and trade. We are pleased to see that the FAO has now integrated some of the data into its FAOSTAT land use database. To carry out this huge task, the project established and maintains a network of 200 data suppliers worldwide.

Many of these data suppliers are from developing countries. The data are not only published annually in the yearbook “The World of Organic Agriculture”, they also are made available on the website www.organic-world.net.

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Foreword from FiBL and IFOAM

Data collection is a major and constant concern of the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM). The comprehensive data provided in this publication serve as an important tool for stakeholders, policy makers, authorities, and the industry, as well as for researchers and extension professionals. The information provided here has proven useful in development programs and supporting strategies for organic agriculture and markets, and crucial for monitoring the impact of these activities. The data collection of FiBL and IFOAM has become one of the most frequently quoted literature in scientific, technical and descriptive papers and reports on organic agriculture.

With this edition, FiBL and IFOAM are presenting *The World of Organic Agriculture* for the thirteenth time. The data and information compiled in this volume document the current statistics, recent developments, and trends in global organic farming. The statistical information and all chapters have been updated. As in previous editions, selected country reports were also compiled.

We would like to express our thanks to all authors and data providers for contributing in-depth information and figures on their region, their country or their field of expertise.

We are grateful to the International Trade Centre (ITC) and the Swiss State Secretariat for Economic Affairs (SECO)/Economic Development and Cooperation for their great support. We would like to especially thank SECO and ITC for investing considerably in our data collection system with the project *Global Information System for Organic Production and Market Data*. This project, ending in 2011, will contribute tremendously to expanding and improving future data collection and processing activities.

Furthermore, we are happy to count on the continuous support of NürnbergMesse, the organizers of the BioFach World Organic Trade Fair.

Frick and Bonn, February 2012

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Organic Agriculture 2012: Key Indicators and Leading Countries

Indicator	World	Leading countries
Countries with data on certified organic agriculture¹	2010: 160 countries	
Organic agricultural land	2010: 37 million hectares (2009: 37.1 million hectares; 1999: 11 million hectares)	Australia (12 mio. hectares, 2009) Argentina (4.2 mio. hectares) US (1.9 mio. hectares, 2008)
Share of total agricultural land	2010: 0.9 %	Falkland Islands (Malvinas) (35.9 %) Liechtenstein (27.3 %) Austria (19.7 %)
Growth of organic agricultural land	2010: -50'000 hectares = -0.1% (2009: +1.9 mio. hectares = +5%; 2008: +2.9 mio. hectares = +9%)	France: +168'000 hectares (+24 %) Poland: +155'000 hectares (+42 %) Spain: +126'000 hectares (+9%)
Further, non-agricultural organic areas (mainly wild collection)	2010: 43 million hectares (2009: 41 million hectares; 2008: 31.9 million hectares)	Finland (7.8 million hectares) Brazil (6.2 million hectares; 2007) Cameroon (6 million hectares)
Producers	1.6 million producers (2009: 1.8 million producers; 2008: 1.4 million producers)	India (400'551), Uganda (188'625), Mexico (128'826)
Organic market size	44.5 billion euros or 59.1 billion US dollars (2009: 54.9 billion US dollars 1999: 15.2 billion US dollars) Source: Organic Monitor	US (20.2 billion euros or 26.7 billion USD, Germany (6 billion euros or 8.4 billion US dollars) France (3.4 billion euros or 4.7 billion US dollars)
Per capita consumption	2010: 6.5 euros or 8.6 US dollars	Switzerland (153 euros or 213 USD), Denmark (142 euros or 198 USD) Luxemburg (127 euros or 177 USD)
Number of countries with organic regulations 2010	84 countries (2009: 74 countries)	
Organic certifiers 2010	2011: 549 certifiers (2010: 532; 2009 489)	Japan, USA, South Korea
Number of IFOAM affiliates	1.1.2012: 870 affiliates from 120 countries (2011: 757 from 115 countries; 2000: 606)	Germany: 105 affiliates; India: 50 affiliates; China: 41 affiliates; South Korea: 39 affiliates; United States: 39 affiliates

Source: FiBL and IFOAM; for total global market: Organic Monitor; for number of certifiers: Organic Standard/Grolink.

¹ Where the designation "country" appears in this book, it covers countries or territories.

The World of Organic Agriculture 2012: Summary

HELGA WILLER¹

Current status of organic agriculture

According to the latest FiBL-IFOAM Survey on certified organic agriculture worldwide,² (data as of end of 2010), data on organic agriculture are available from 160 countries.

There are 37 million hectares of organic agricultural land (including in-conversion areas). The regions with the largest areas of organic agricultural land are Oceania (12.1 million hectares), Europe (10 million hectares), and Latin America (8.4 million hectares). The countries with the most organic agricultural land are Australia, Argentina, and the United States.

Currently 0.9 percent of the agricultural land is organic.³ By region, the highest shares are in Oceania (2.9 percent) and in Europe (2.1 percent). In the European Union, 5.1 percent of the farmland is organic. However, some countries reach far higher shares: Falkland Islands: 35.9 percent; Liechtenstein: 27.3 percent; Austria 19.7 percent. In seven countries, more than ten percent of the agricultural land is organic.

Compared with the previous survey (data per end of 2009), the organic agricultural land decreased slightly (by 50'000 hectares, -0.1 percent). There was strong growth in Europe, where the area increased by 0.8 million hectares (+9 percent). In Asia, however, the organic area decreased, mainly due to a major decline of organic farmland in India and China. The countries with the largest increases were in Europe: France (+0.17 million hectares), Poland (+0.15 million hectares), and Spain (+0.13 million hectares).

Apart from agricultural land, there are further organic areas, most of these being areas for wild collection. Other areas include aquaculture, forests, and grazing areas on non-agricultural land. They constitute 43 million hectares. In total, 80 million hectares (agricultural and non-agricultural areas) are organic.

There were 1.6 million producers in 2010. Thirty-four percent of the world's organic producers are in Africa, followed by Asia (29 percent), and Europe (18 percent). The countries with the most producers are India (400'551), Uganda (188'625), and Mexico (128'862).

About one third of the world's agricultural land (12.5 million hectares) and more than 80 percent of the producers are in developing countries and emerging markets.

For almost 90 percent of the organic agricultural land, land use details were available. About two-thirds was grassland/grazing areas (23.7 million hectares). With a total of at least 6.1 million hectares, arable land constitutes 17 percent of the organic agricultural land. An increase of six percent compared with 2009 was reported. Most of this category of land is used for cereals including rice (2.5 million hectares), followed by green fodder from arable land (2 million hectares), oilseeds (0.5 million hectares), protein crops (0.3 million hectares), and vegetables (0.2 million hectares). Permanent crops account for

¹ Dr. Helga Willer, Communication, Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Internet www.fibl.org

² The survey included both fully converted and in-conversion organic areas.

³ Countries included in the survey.

approximately seven percent of the organic agricultural land, amounting to 2.7 million hectares. Compared with the previous survey, this is an increase of six percent. The most important permanent crops are coffee (with 0.64 million hectares), constituting almost one-fifth of the organic permanent cropland), followed by olives (0.5 million hectares), cocoa (0.29 million hectares), nuts (0.26 million hectares), and grapes (0.22 million hectares). Regarding the wild collection area (including areas for beekeeping), most of this is in Africa (39 percent of the global total) and Europe (30 percent). Not much detail on the crops harvested is available. Wild berries, medicinal and aromatic plants as well wild fruit are among the most important ones.

Global market

Global sales of organic food & drink reached 59 billion US dollars¹ in 2010 according to Organic Monitor (see chapter by Amarjit Sahota, page 122). The market has expanded over three-fold in ten years (2000: 17.9 billion US dollars). Although growth has slowed since the financial crisis started in 2008, sales have continued to increase at a healthy pace. Demand for organic products is concentrated in two regions; North America and Europe comprise 96 percent of global revenues. The high degree of sales concentration highlights the disparity between production and consumption. Indeed, most organic food production in regions such as Africa and Latin America is export-g geared. In 2010, the countries with the largest markets were the United States, Germany, and France, and the highest per-capita consumption was in Switzerland, Denmark, and Luxemburg. (See chapter on the global survey on organic agriculture, page 67).

Africa

In Africa, there are slightly more than one million hectares of certified organic agricultural land. This constitutes about three percent of the world's organic agricultural land. There were 540'000 producers (in 2010). The countries with the most organic land are Uganda (0.23 million hectares), Tunisia (0.18 million hectares), and Ethiopia (0.14 million hectares). The highest shares of organic land are in Sao Tome and Prince (7.9 percent), Sierra Leone (1.9 percent), and Tunisia (1.8 percent). The majority of certified organic produce in Africa is destined for export markets; in Uganda, the export value for organic products was 42 million US dollars in 2010/2011; in Ethiopia it was 33.9 million US dollars in 2010 (see article by Addisu Alemayehu on organic farming in Ethiopia on page 159). Key crops are coffee, olives, cocoa, oilseeds, and cotton. Cotton for instance has been important for the development of the sector in Benin (see article by Laurent Glin on page 152). The European Union is Africa's largest market for agricultural produce. The development of organic agriculture in Africa is entering a new phase. There is a growing recognition among policy makers that organic agriculture has a significant role to play in addressing the pressing problems of food insecurity, poverty, and climate change in Africa. Significant breakthroughs were achieved in 2011; especially the African Union's (AU) decision to support organic farming and their subsequent leadership in promoting and further developing frameworks/strategies for organic farming policies such as the African Ecological Organic Agriculture Initiative and the IFOAM-African Union Conference that took place in November 2011 in Nairobi. The African Organic Conference to be held in Lusaka, Zambia in May 2012, will provide a key platform for discussion and sharing

¹ 1 USD = 0.75488 EUR, average exchange rate 2010 according to OANDA at <http://www.oanda.com/lang/de/currency/average>

experiences. Moreover, this conference will provide a significant opportunity to mobilize support for organic agriculture (see article by Hervé Bouagnimbeck, page 146).

Asia

The total organic agricultural area in Asia is nearly 2.8 million hectares. This constitutes seven percent of the world's organic agricultural land. There were almost 0.5 million producers reported, 0.4 million in India. The leading countries by area are China (1.4 million hectares) and India (0.8 million hectares); Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent). Compared with 2009, there has been a decrease of organic land, due to declines in China and India (see chapter on organic farming in Asia by Ong Kung Wai, page 170). Interestingly, the decline in land has not affected trade. Reports on the Chinese domestic market paint a picture of robust growth. India's export volume increased by 20 percent over the previous year. Export destination figures indicate growing trade in the region. Thirteen percent of export by volume was to Asia. Organic labeling is regulated to require third party certification in China, India (for export), Japan, Philippines, South Korea, and Taiwan. India and Japan have established third country recognition with the European Union as well as recognition of their accreditation system by the United States Department of Agriculture (USDA). Most exports elsewhere are certified by international certification bodies working in the regions accredited by international and EU-based accreditation bodies or directly by the USDA. The 17th Organic World Congress (OWC) of the International Federation of Organic Agriculture Movements (IFOAM), held in Gyeonggi Paldang, South Korea in autumn 2011 was a big success. It attracted close to 2000 participants from 76 countries. The conference was hosted by the Gyeonggi Province, Namyangju City and the Korean Federation for Sustainable Agriculture (KFSA). For more information about the development in Asia, see chapters on organic farming in Azerbaijan by Vugar Babayev (page 178), on organic farming in Iran by Paul Rye Kledal, Hossein Mahmuodi, and Abdol Majid Mahdavi Damghani (page 184), and on organic farming in Thailand by Vitoon Panyakul (page 190).

Europe

As of the end of 2010, 10 million hectares of agricultural land in Europe were managed organically by almost 280'000 farms. In Europe, 2.1 percent of the agricultural area, and in the European Union, 5.1 percent of the agricultural area is organic. Twenty-seven percent of the world's organic land is in Europe. Compared to 2009, organic land increased by nearly 0.8 million hectares. The countries with the largest organic agricultural area are Spain (1.5 million hectares), Italy (1.1 million hectares), and Germany (0.99 million hectares). There are six countries in Europe with more than ten percent organic agricultural land: Liechtenstein (27.8 percent), Austria (19.7 percent), Sweden (14.1 percent), Estonia (12.5 percent), Switzerland (11.4 percent), and Czech Republic (10.5 percent). Sales of organic products were approximately 19.6 billion euros in 2010. The largest market for organic products in 2010 was Germany with a turnover of 6 billion euros, followed by France (3.4 billion euros) and the UK (2 billion euros) (see article by Diana Schaack et al., page 206). A new research project on transparency of organic market data was launched in early 2012. It is expected that this will be a major step forward to improve European market data (see article by Helga Willer, page 201). Detailed information about imports to Germany is available in the article by Diana Schaack et al., page 212). Furthermore two

country reports are available: one from Stoilko Apostolov about Bulgaria (page 216), and one from Gizem Altin Nance about Turkey (page 223).

Latin America

In Latin America, more than 270'000 producers managed 8.4 million hectares of agricultural land organically in 2010. This constitutes 23 percent of the world's organic land and 1.4 percent of the region's agricultural land. The leading countries are Argentina (4.2 million hectares), Brazil (1.8 million hectares), and Uruguay (0.9 million hectares). The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.9 percent), the Dominican Republic (8.5 percent), and French Guyana (7.8 percent).

In the Latin American and Caribbean region, organic production is mostly export-oriented. On average, 85 percent of what is produced organically is exported to the main organic markets, such as the European Union, the United States, and Japan. For countries with tropical and mountain ecosystems, the main organic export products are coffee, cacao, banana, and quinoa. For countries with extensive land areas with pastures for animal grazing, the main products are meat and wool. Wild collection of nuts is also of significant importance for international markets. Argentina and Costa Rica are the only two countries in the region with third country status for the European Union.

In the past decade, initiatives coming mostly from civil society (producer organizations and NGOs) and local governments, contributed to the development of domestic markets, which are increasing in size. The participation of governments in the organic sector has been focused on control and regulatory issues. This is seen in the many organic regulations the region has. The organic movement expects a more effective and clear participation of governments through public policies to foster and develop organic agriculture not only for export-oriented operators, but also for the domestic organic market and family farmers.

North America

In North America, almost 2.7 million hectares are managed organically, of these nearly two million in the United States (2008 data) and 0.7 million in Canada (2009 data), representing approximately 0.7 percent of the total agricultural area in the region and 7 percent of the world's organic agricultural land.

The U.S. organic market grew at a rate of nearly eight percent in 2010, to reach nearly 29 billion US dollars (food and non-food), according to findings from the Organic Trade Association's (OTA) 2011 Organic Industry Survey. While total U.S. food sales grew by less than one percent in 2010, the organic food industry grew by 7.7 percent. In the organic non-food sector, organic supplements led, with a value of 681 million US dollars, representing a 7.4 percent growth over 2009 figures. Through 2010 and 2011, the Canadian organic market continued to show signs of solid growth and consumer confidence, following the introduction of mandatory federal regulations for organic in 2009. The Canada Organic Trade Association has estimated that the Canadian consumer market was valued at 2.6 billion Canadian dollars by the end of 2010.

At the end of June 2011, the Government of Canada entered into an equivalency arrangement on the trade of organic products with the European Union (EU). It is the world's second such agreement. The first organic equivalency arrangement was signed by the Canadian Food Inspection Agency and the U.S. Department of Agriculture (USDA) in

June 2009. In December 2011, a framework for an organic equivalence agreement between the United States and the European Union was approved.

For more details on recent developments, see articles by Barbara Haumann on the United States (page 267), and by Matthew Holmes and Anne Macey (page 267) in the North American section of this book.

Oceania

This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu. Altogether, there were 8'500 producers, managing 12.1 million hectares. This constitutes 2.9 percent of the agricultural land in the area and 33 percent of the world's organic land. Ninety-nine 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 (124'000 hectares), and Samoa (9'714 hectares). The highest shares of all agricultural land are in Samoa (7.9 percent), followed by French Polynesia (3.8 percent), and Niue (3.1 percent). Growth in the organic industry in Australia, New Zealand, and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic markets are, however, also growing. In Australia, the domestic market was at 947 million Australian dollars¹ in 2009 and in New Zealand at 350 million New Zealand dollars (2009).²

The biggest change in the Australian domestic market over 2009 was that the Australian Standard for Organic and Biodynamic Products was adopted and published by Standards Australia. Now that this standard has been published, industry and the Australian Quarantine and Inspection Service (AQIS) are working towards a situation where one standard can be used for the domestic and export market. There has been no change in policy or programs by state or Federal Governments to financially supporting conversion of organic farming operations. There is, however, increased recognition of the uniqueness of organic farming systems (see article by Els Wynen and Alexandra Mitchell, page 288).

In 2010, the International Organic Accreditation Service (IOAS) assessed the Pacific Organic Standard (POS) and found it, after some corrective actions, to be equivalent to the requirements of the European Union regulations on organic agriculture. This means that, according to the IOAS, the POS is suitable as a standard for the certification of operators who may wish to export products to the European Union. The year 2011, however, brought little progress in the international recognition of the POS. The year 2010 also saw the Pacific region's first Participatory Guarantee System (PGS) become operational in New Caledonia. The PGS uses the Pacific Organic Standard (POS) as its production standard. Most of the organically certified products from the region are for export. Generally, the domestic markets for organically certified products are not very developed. Despite the policy brief on organic agriculture developed by the Secretariat of the Pacific Community (SPC) in 2009, the year 2011 saw no changes in legislation or policy development in the region. The policy brief aims to assist governments and others in the region develop relevant policy focuses on how organic agriculture can assist in meeting regional challenges. Increasingly organic agriculture is gaining mention and recognition in national policy and planning documents, but this has not evolved into formal policies. While the

¹ 1 Australian dollar = 0.56599 euros in 2009; average annual exchange rate 2009; Source: <http://www.oanda.com/lang/de/currency/average>

² 1 New Zealand dollar = 0.45376 Euros in 2009, average exchange rate; average annual exchange rate 2009; Source: <http://www.oanda.com/lang/de/currency/average>

implementation of the Pacific Organic Standard (POS) has been slow due to resource constraints, momentum of the movement remains strong across the region, and the outlook for the development of organics in the region is positive (see chapter by Karen Mapusua, page 292).

Standards and regulations

The year 2011 was a year of further consolidation in the field of standards and regulations.¹ Relevant work has been carried out to facilitate the international organic trade and reduce trade barriers. The European Union and the United States achieved a breakthrough in their negotiations concerning the mutual recognition of their organic standards and control systems. The formal arrangements are expected to be finalized and implemented in early 2012. These arrangements will lead to a considerable reduction of bureaucracy for trading organic products between the EU and the US. Furthermore, after two years of assessment and internal negotiations, the European Commission published the first list of control bodies recognized for operations in countries outside the European Union. According to the FiBL survey on organic rules and regulations, the number of countries with organic standards has increased to 84, and there are 24 countries that are in the process of drafting legislation. A special case is Ukraine, where the parliament adopted an organic legislation in 2011, but it did not come into force due to a veto of the Ukrainian president.

The International Federation of Organic Agriculture Movements (IFOAM) recently revised its Organic Guarantee System (OGS). The new system approved in July 2010 contains several services: The IFOAM Family of Standards, the Global Organic Mark, and the IFOAM Accreditation & the Global Organic System Accreditation (GOSA) (see article by Huber et al. on page 128).

There has been modest growth in the number of certification bodies in most regions of the world, although the number has increased rapidly in some Asian countries, mainly in India. Many of the new certifiers are branch offices of international certification bodies that have gained approval, for instance, by the European Union or the local government. The total number of certification bodies is 549, up from 532 in 2010. Most certification bodies are located in the European Union, Japan, the United States, South Korea, China, Canada, India, and Brazil.

Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks, and knowledge exchange. IFOAM is the only organization compiling global data about PGS, and first estimations show about 40 PGS initiatives have been established worldwide and more than 20 are currently under development. Latin America and India are the leaders in terms of the number of farmers certified through PGS as well as of the level of recognition achieved towards the national governments (see article by Flávia Castro, page 142).

Developments within IFOAM

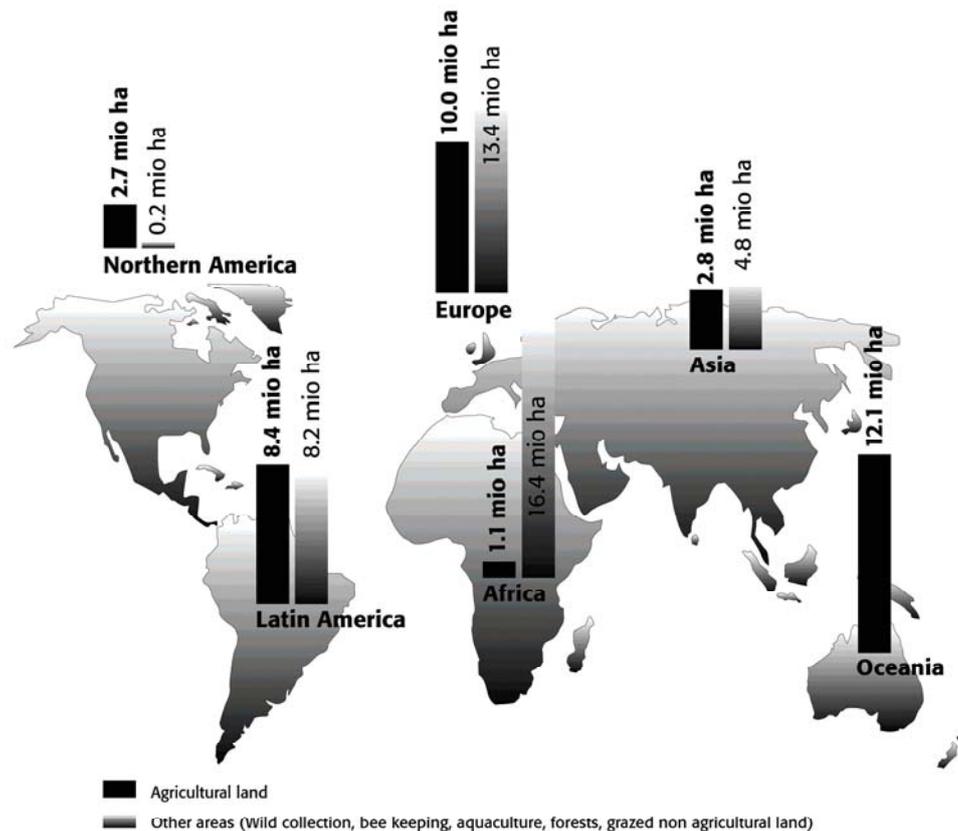
In 2011, two major publications from the United Nations Conference on Trade and Development (UNCTAD) and from the UN Special Rapporteur on Food supported the view

¹ For a brief history of organic standards and regulations see www.organic-world.net/rules.html as well as previous versions of this article as published in the various editions of *The World of Organic Agriculture*. These can be downloaded at www.organic-world.net/former-editions.html.

that organic agriculture is a good farming system and development concept for achieving sustainability in agriculture. At the United Nations Conference on Sustainable Development (UNCSD, the Rio+20 Earth Summit), to take place in June in Rio de Janeiro in 2012, IFOAM and other actors from the organic movement will be actively lobbying for the implementation of the findings of the 2008 IAASTD¹ report. IFOAM and other organic stakeholders have already successfully lobbied for agriculture to be on the agenda of the upcoming earth summit. They also made contributions to what is known as the “zero document”, setting the scene for the negotiations of the countries, which are being closely observed by civil society and the media.

¹ IAASTD = United Nation’s International Assessment of Agricultural Knowledge, Science and Technology for Development

Organic Agriculture Worldwide: The Results of the Global Survey on Organic Agriculture



Map 1: Organic agricultural land and other organic areas in 2010

Source: FiBL-IFOAM Survey 2012

Current Statistics on Organic Agriculture Worldwide: About

HELGA WILLER¹ AND JULIA LERNOUD²

The 13th survey on certified organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture (FiBL) in cooperation with the International Federation of Organic Agriculture Movements (IFOAM).

The activities were funded by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), and NürnbergMesse.

As in previous years, governments, private sector organizations, and certifiers contributed to the data collection effort. Several international certifiers deserve special mention as they provided data on a number of countries: BCS, CERES, Certisys, Control Union, Ecocert, ICEA, Institute for Marketecology (IMO), LACON, Naturland, and the Soil Association. Furthermore, data collection in the Mediterranean countries was carried out in cooperation with the Mediterranean Organic Agriculture Network (MOAN, c/o IAM Bari) and in the Central American countries with RUTA, the Regional Unit for Technical Assistance for Sustainable Rural Development. A list of all contributors by country is available in the annex.

We are pleased to announce that the FAO has now integrated some of the data into its FAOSTAT land use database.

In total, data were available from 160 countries (most data are per end of 2010). From French Polynesia, data were received for the first time. For Angola, for which data had previously been available, data were no longer available.

Updated data on the organic area were available for 134 countries; however, for some countries, updates were only available for the total organic area, but not necessarily for the number of farms or land use or other variables. In such cases, data of the previous survey were used.

The following data were collected:

- Organic agricultural land;
 - o Land area

SECO-ITC project on data collection

Under the SECO-ITC project on global organic data collection and processing (2008-2011) a number of tasks were carried out:

The tools for data collection and processing were improved to include more variables, the existing classification for land use and crop data was expanded, a classification for manufactured products was developed, support was given to some developing countries for their data collection, and a study on the availability of data and on data collection systems worldwide was carried out.

Furthermore, the website www.organic-world.net was set up and maintained, and a number of slide presentations are available. The data are now also available in a dynamic data table.

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²Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Switzerland, www.fibl.org.

- Shares of organic agricultural land
- Growth in organic land
- Land use and crop data
- Further organic areas like wild collection, aquaculture, forest;
- Producers and further operator types;
- Market and trade data;
- Data on organic farming in developing countries.

Not all data collected are published in this book (e.g., production volumes, animal numbers, import and export volumes in tons), as for many variables, no complete global picture is possible. More information about data background is available on page 120.

Table 1: Countries and territories covered by the global survey on organic agriculture 2010

	Countries* with data on organic agriculture	Countries per region	Share of countries that provided data (%)
Africa	37	57	65
Asia	37	49	76
Europe	45	46	98
South & Central America, Caribbean	29	45	64
North America	2	5	40
Oceania	10	13	77
World	160	214	75

Source: FiBL-IFOAM Survey 2012

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

www.organic-world.net

At the Organic-World website (www.organic-world.net), tables with more details on crops, country details and conversion status can be downloaded as excel files.

Contact

Enquiries related to the data should be directed to Helga Willer, FiBL, Frick, e-mail helga.willer@fibl.org.

General note on the data

Organic areas: Data represent certified **organic land/areas that are already fully converted as well as land under conversion**, since many data sources do not separate or include the latter (for instance Australia, Austria, Germany, Switzerland), and since land under conversion is under organic management. For a definition of organic agriculture see IFOAM website.¹

Countries: For countries and areas, the Standard Country and Area Codes Classifications as defined by the United Nations Statistics division is used.² Where the designation "country" appears in this volume, it covers countries or territories.

Data sources: Data were gathered from organizations of the private sector, governments, and certification bodies. For detailed information on the data sources, please check the annex at the end of this volume.

Direct year-to-year comparison: A direct year-to-year comparison is not always possible for many data, as the data sources may change or data access becomes better.

Completeness of data: For some countries, either no current data were available or the data provided were not complete. For some countries, no data were available at all. Therefore, it may be assumed that the extent of organic agriculture is larger than documented in this volume.

Crop data: For some crops, the area values provided might refer to main crops grown on a certain area/or on a farm, the actual area for that particular crop may be smaller. Furthermore, in some cases the areas may refer to agroforestry areas, where the provided crop surfaces are the total surface of the agroforestry system, including shade trees and other crops. This may explain for some crops the high shares of some organic crops, in particular tropical crops, in the crop chapter.

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 number of companies, projects or grower groups, which may each comprise a number of producers. This applies in particular to many African countries.

Data revisions: Data revisions and corrections, compared with the data published in the 2011 edition of *The World of Organic Agriculture* are communicated at <http://www.organic-world.net/revisions.html> as well as www.organic-world.net/statistics-data-tables.html. A table with land area data including revisions (since 2005) is available on page 50.

¹ The following pages at the IFOAM website are informing about definitions and principles of organic agriculture.

- › Definition of organic agriculture: http://www.ifoam.org/growing_organic/definitions/doa/index.html
- › Principles of organic agriculture: http://www.ifoam.org/about_ifoam/principles/index.html,
- › The IFOAM Organic Guarantee System: http://www.ifoam.org/about_ifoam/standards/ogs.html
- › IFOAM Family of Standards:
http://www.ifoam.org/about_ifoam/standards/family_of_standards/family_of_standards.html

² For the composition of macro geographical (continental) regions, geographical sub-regions, and selected economic and other groupings see the UNSTAT homepage at <http://unstats.un.org/unsd/methods/m49/m49regin.htm>

Organic agricultural land

Currently 37 million hectares are under organic agricultural management (end of 2010 for most data).¹

Apart from the organic agricultural land, there are further organic areas, like wild collection. These areas constitute 43 million hectares. Further information is available on page 35.

The region with the most organic agricultural land is Oceania, with 12.15 million hectares, followed by Europe with 10 million hectares, Latin America (8.4 million hectares), Asia (2.8 million hectares), North America (2.7 million hectares), and Africa (more than 1 million hectares).

Oceania has almost one-third of the global organic agricultural land, but its relative importance is decreasing. Europe, a region that has had a very constant growth of organic land over the years, has 27 percent of the world's organic agricultural land, followed by Latin America with 22.7 percent (see Table 2, Figure 1).

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 (Table 3, Figure 2). The ten countries with the most organic land have a combined total of 26.6 million hectares, constituting seventy percent of the world's organic agricultural land.

Table 2: World: Organic agricultural land (including in-conversion areas) and regional shares of the global organic agricultural land 2010

Region	Organic agricultural land (hectares)	Regions' share of the global organic agricultural land
Africa	1'075'829	2.9%
Asia	2'778'291	7.5%
Europe	10'002'087	27.0%
Latin America	8'389'459	22.7%
Northern America	2'652'624	7.2%
Oceania	12'144'984	32.8%
Total*	37'041'004	100.0%

Source: FiBL-IFOAM 2012

Note: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest, and non-agricultural grazing areas.

* Includes correction value for French overseas departments

¹ Data provided on the conversion status were included in this work. However, some countries provided only data on the fully converted area, others only on the total organic agricultural land, and thus the conversion area is not known for many countries.

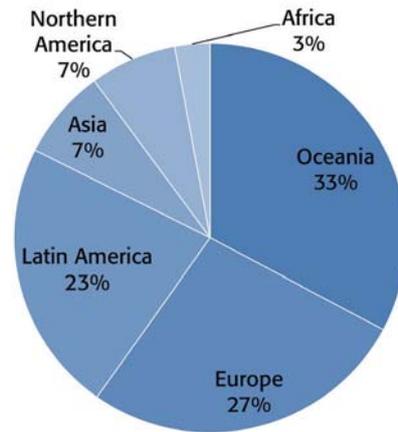


Figure 1: World: Distribution of organic agricultural land¹ by region 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

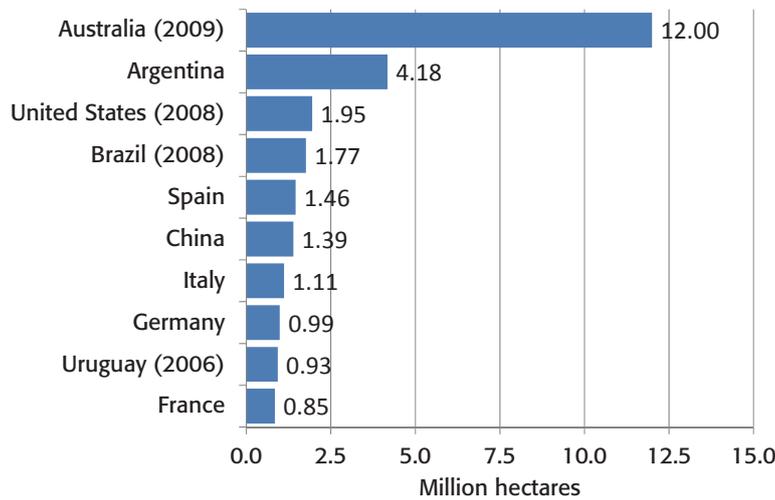


Figure 2: World: The ten countries with the largest areas of organic agricultural land² 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

¹ Notes: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest, and non-agricultural grazing areas.

² Notes: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest, and non-agricultural grazing areas.

Table 3: World: Organic agricultural land (including in-conversion areas) by country 2010 (sorted)

For an alphabetical country list see page 307.

Country	Hectares
Australia	12'001'724
Argentina	4'177'653
United States of America	1'948'946
Brazil	1'765'793
Spain	1'456'672
China	1'390'000
Italy	1'113'742
Germany	990'702
Uruguay	930'965
France	845'442
India	780'000
Canada	703'678
United Kingdom	699'638
Austria	543'605
Poland	521'970
Czech Republic	448'202
Sweden	438'693
Falkland Islands (Malvinas)	398'806
Turkey	383'782
Mexico	332'485
Greece	309'823
Ukraine	270'226
Uganda	228'419
Peru	216'756
Portugal	201'054
Romania	182'706
Tunisia	175'066
Slovakia	174'471
Finland	169'168
Latvia	166'320
Dominican Republic	165'109
Denmark	162'903
Lithuania	143'644
Ethiopia	137'196
Kazakhstan	133'562
Hungary	127'605
New Zealand	124'463

Country	Hectares
Switzerland	119'613
Estonia	112'972
Bolivia	112'109
Egypt	82'167
Philippines	79'992
Tanzania	72'665
Indonesia	71'208
Sierra Leone	65'252
Ecuador	64'751
Norway	57'219
South Africa	55'621
Sudan	53'602
Paraguay	51'190
Belgium	49'005
Ireland	47'864
Netherlands	46'233
Russian Federation	44'017
Sri Lanka	43'664
Saudi Arabia	42'376
Macedonia, FYROM	35'164
Thailand	34'079
Nicaragua	33'621
Colombia	33'334
Democratic Republic of the Congo	32'523
Moldova	32'105
Chile	31'696
Slovenia	30'696
Senegal	28'175
Bulgaria	25'648
Timor-Leste	24'750
Croatia	23'352
Pakistan	22'103
Azerbaijan	21'347
Madagascar	20'288
Syrian Arab Republic	19'987
Viet Nam	19'272
Côte d'Ivoire	18'133
Honduras	17'825
Morocco	17'030
Republic of Korea	15'518
Mali	15'199
Kyrgyzstan	15'040
Cuba	14'314

Country	Hectares
Burkina Faso	13'802
Guatemala	13'375
Ghana	12'635
Nigeria	11'979
Costa Rica	11'114
Nepal	9'789
Samoa	9'714
Japan	9'067
Israel	8'794
Serbia	8'635
Cambodia	8'084
Zambia	7'310
Iran (Islamic Republic of)	7'256
El Salvador	6'736
Occupied Palestinian Territory	6'354
Iceland	5'806
Mozambique ¹	5'519
Lao People's Democratic Republic	4'885
Kenya	4'842
Sao Tome and Principe	4'411
Guyana	4'249
Luxembourg	3'720
Rwanda	3'600
Cyprus	3'575
Montenegro	3'561
Togo	3'409
Panama	3'242
Papua New Guinea	3'156
Taiwan	2'962
Vanuatu	2'664
Zimbabwe	1'995
French Guiana (France)	1'776
French Polynesia	1'681
Malaysia	1'582
Jordan	1'469
Georgia	1'401
Solomon Islands	1'306
Lebanon	1'227
Belize	1'177
Benin	1'167
Comoros	1'045

Country	Hectares
Liechtenstein	1'020
Malawi	824
Bangla Desh	799
Armenia	750
Algeria	622
Bosnia and Herzegovina	580
Jamaica	542
Cameroon	496
Tajikistan	391
Channel Islands	370
United Arab Emirates	360
Burundi	350
Venezuela (Bolivarian Republic of)	337
Albania	284
Réunion (France)	276
Faroe Islands	253
Martinique (France)	193
Haiti	188
Niue	159
Namibia	124
Fiji	100
Grenada	85
Uzbekistan	65
Afghanistan	61
Myanmar	60
Niger	48
Oman	39
Mauritius	35
Guadeloupe (France)	27
Malta	24
Cook Islands	18
Suriname	11
Swaziland	6
Andorra	2

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

¹ Data partly based on FiBL estimate

Shares of organic agricultural land by region and country

The share of the world's organic agricultural land of all agricultural land is 0.9 percent (for the countries included in the survey).

By region, the share is highest in Oceania (2.9 percent), followed by Europe with 2.1 percent and Latin America with 1.4 percent. In the 27 countries of the European Union, the share of the organic agricultural land is 5.1 percent. In the other regions, the share is less than one percent (see Table 4).

Many countries, however, exhibit much higher percentages (Figure 3), and seven countries have even reached shares of more than ten percent of the agricultural land, most of these are in Europe. The country with the highest organic share of agricultural land is the Falkland Islands (Malvinas), where several large sheep farms are working organically. It is interesting to note that many island states have high shares.

However, 63 percent of the countries, for which data were available, have less than one percent organic agricultural land (Figure 4).

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2010

	Organic agr. land [ha]	Share of total agr. land
Africa	1'075'829	0.1%
Asia	2'778'291	0.2%
Europe	10'002'087	2.1%
Latin America	8'389'459	1.4%
Northern America	2'652'624	0.7%
Oceania	12'144'984	2.9%
Total	37'041'004	0.9%

Source: FiBL-IFOAM Survey 2012.

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

In order to calculate the percentages, the data for most countries were taken from the FAO Statistical database FAOSTAT (as of 2009).¹ For the European Union, most data were taken from Eurostat.² Where available, data for total agricultural land from ministries was used (for instance U.S., Switzerland, and Austria), which sometimes differ from those published by Eurostat or FAOSTAT.

Please note that 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 communicated by ministries or local experts.

¹ FAOSTAT, Data Archives, the FAO Homepage, FAO, Rome at faostat.fao.org > Resources > Resourcestat at <http://faostat.fao.org/site/377/default.aspx#ancor>

² Eurostat: Basic data – key agricultural statistics at http://ec.europa.eu/agriculture/agrista/2007/table_en/2012.pdf, The Eurostat Homepage, Eurostat, Luxembourg

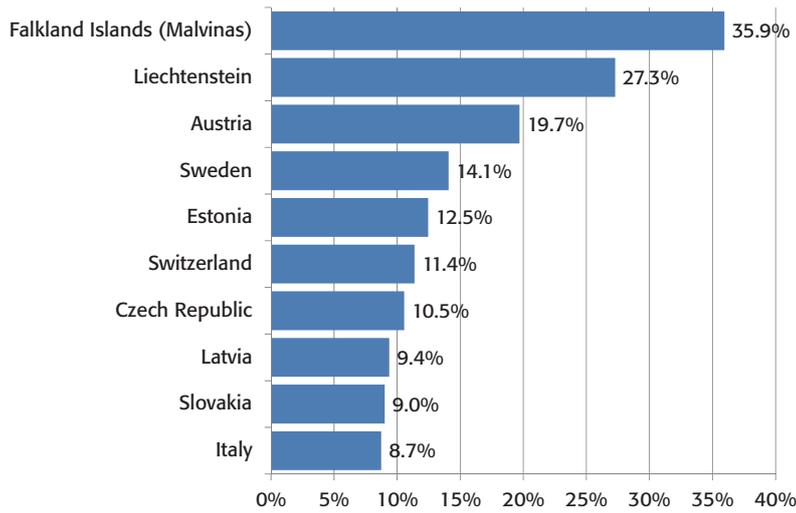


Figure 3: World: The ten countries with the highest shares of organic agricultural land 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

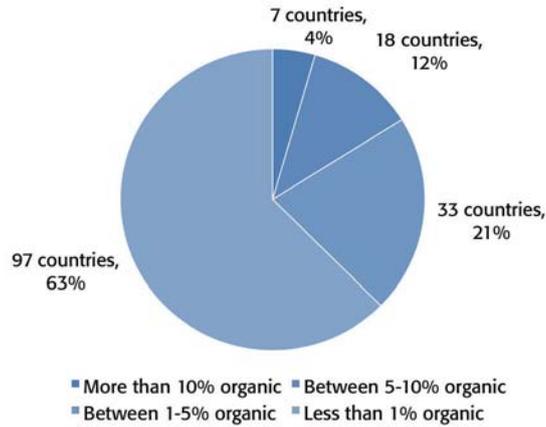


Figure 4: World: Distribution of the shares of organic agricultural land 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307. .

Table 5: World: Shares of organic agricultural land by country 2010, sorted

For an alphabetical country list see page 307.

Country	Share	Country	Share
Falkland Islands (Malvinas)	35.9%	Turkey	1.6%
Liechtenstein	27.3%	Solomon Islands	1.6%
Austria	19.7%	Mexico	1.5%
Sweden	14.1%	Vanuatu	1.4%
Estonia	12.5%	Romania	1.3%
Switzerland	11.4%	Moldova	1.3%
Czech Republic	10.5%	Ireland	1.2%
Latvia	9.4%	New Zealand	1.1%
Slovakia	9.0%	Canada	1.0%
Italy	8.7%	Peru	1.0%
Dominican Republic	8.5%	Ecuador	0.9%
Faroe Islands	8.4%	Bulgaria	0.8%
Samoa	7.9%	Republic of Korea	0.8%
Sao Tome and Principe	7.9%	Belize	0.8%
French Guiana (France)	7.8%	Montenegro	0.7%
Finland	7.4%	Réunion (France)	0.7%
Timor-Leste	6.6%	Martinique (France)	0.7%
Uruguay	6.3%	Grenada	0.7%
Slovenia	6.3%	Brazil	0.7%
Denmark	6.1%	Comoros	0.7%
Germany	5.9%	Philippines	0.7%
Spain	5.9%	Ukraine	0.7%
Portugal	5.8%	Nicaragua	0.7%
Norway	5.5%	Costa Rica	0.6%
Lithuania	5.4%	United States of America	0.6%
United Kingdom	4.3%	Cook Islands	0.6%
Channel Islands	4.2%	Honduras	0.6%
French Polynesia	3.8%	Azerbaijan	0.4%
Greece	3.7%	El Salvador	0.4%
Belgium	3.6%	India	0.4%
Poland	3.4%	Ethiopia	0.4%
The former Yugoslav Republic of Macedonia	3.3%	Taiwan	0.3%
Niue	3.2%	Guatemala	0.3%
France	3.1%	Bolivia	0.3%
Hungary	3.0%	Senegal	0.3%
Argentina	3.0%	Papua New Guinea	0.3%
Australia	2.9%	China	0.3%
Luxembourg	2.8%	Iceland	0.3%
Cyprus	2.4%	Guyana	0.3%
Netherlands	2.4%	Paraguay	0.2%
Egypt	2.2%	Japan	0.2%
Sierra Leone	1.9%	Malta	0.2%
Croatia	1.8%	Nepal	0.2%
Tunisia	1.8%	Cuba	0.2%
Occupied Palestinian Territory	1.7%	Lao People's Democratic Republic	0.2%
Israel	1.7%	United Republic of Tanzania	0.2%
Sri Lanka	1.7%	Chile	0.2%
Uganda	1.6%	Viet Nam	0.2%
		Rwanda	0.2%

Lebanon	0.2%
Thailand	0.2%
Serbia	0.2%
Cambodia	0.1%
Panama	0.1%
Democratic Republic of the Congo	0.1%
Syrian Arab Republic	0.1%
Jordan	0.1%
Kyrgyzstan	0.1%
Indonesia	0.1%
Jamaica	0.1%
Burkina Faso	0.1%
Togo	0.1%
Côte d'Ivoire	0.1%
Pakistan	0.1%
Ghana	0.1%
Colombia	0.1%
Guadeloupe (France)	0.1%
Kazakhstan	0.1%
United Arab Emirates	0.1%
Morocco	0.1%
South Africa	0.1%
Georgia	0.1%
Madagascar	0.05%
Armenia	0.04%
Sudan	0.04%
Mali	0.04%
Mauritius	0.04%
Benin	0.04%
Zambia	0.03%
Bosnia and Herzegovina	0.03%
Saudi Arabia	0.02%
Fiji	0.02%
Albania	0.02%
Russian Federation	0.02%

Malaysia	0.02%
Kenya	0.02%
Burundi	0.02%
Nigeria	0.02%
Venezuela (Bolivarian Republic of)	0.02%
Iran (Islamic Republic of)	0.01%
Malawi	0.01%
Suriname	0.01%
Zimbabwe	0.01%
Mozambique	0.01%
Andorra	0.01%
Haiti	0.01%
Bangla Desh	0.01%
Tajikistan	0.01%
Cameroon	0.01%
Oman	0.002%
Algeria	0.002%
Myanmar	0.0005%
Swaziland	0.0005%
Namibia	0.0003%
Uzbekistan	0.0002%
Afghanistan	0.0002%
Niger	0.0001%
Belarus (Wild collection only)	
Bhutan (Wild collection only)	
Chad (Wild collection only)	
Lesotho (Wild collection only)	

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Development of the organic agricultural land

Compared with the revised data¹ from 2009, in 2010 the organic agricultural land decreased by approximately 50'000 hectares or 0.1 percent. Since data collection on organic agriculture worldwide was first started in 1999, this is the second time a decrease of the global organic land occurred. Compared with 1999, the organic agricultural land has more than trebled (Willer/Yussefi 2000).

In 2010, the organic agricultural land increased only in Europe and in Africa. The highest relative absolute growth was in Europe (+8.7 percent, +0.8 million hectares). A major decrease occurred in Asia, where India reported a decrease in organic land of 0.4 million and China a decrease of 0.46 million hectares. For India, the following information was provided by two experts from India, Manoj Kumar Menon of the International Competence Centre of Organic Agriculture (ICCOA) and Dr A.K. Yadav of the National Center of Organic Farming (NCOF):

"Initial survey and results emanating from certification agencies databases, reveal that the first and foremost reason for the sharp decline is the drastic reduction in the area under organic cotton (a reduction of nearly 200'000 hectares) due to spread of BT cotton and the non-availability of non-BT seeds. Contamination of organic fields from adjoining BT cotton fields also resulted in the rejection of certification status of some large farmer groups. Furthermore, there was also a pressure on the organic cotton prices, which caused many farmers to quit organic farming in favor of GM farming.

The withdrawal of some support schemes from Central and State Governments to compensate certification costs and the failure of adequate linkages with the market and premium prices have also prompted many farmer group to opt out of the organic certification system.

A third possible reason could be the introduction of the new online traceability scheme by APEDA², under which each farmer must register the details of the area under a certification program into an online system called Tracenet, made mandatory since 2010. This is a cumbersome process, and not many farmer groups could cope with the new challenge and the associated costs. Thus, it is likely that many certified groups had not 'registered' themselves into this Tracenet and so are not counted."

For more information about the developments in Asia see the chapter by Ong Kung Wai, page 170.

Seventy-nine countries showed an increase in their agricultural land. A decrease was reported from 46 countries. In 35 countries, the organic agricultural area did not change or no new data were received. The largest increases of organic agricultural land were in European countries: France, Poland, and Spain.

The figures communicated in the following tables and graphs with historical figures may differ from previously communicated data, as data revisions were received for a number of countries and included in the FiBL database.

¹ For details on data revisions see <http://www.organic-world.net/statistics-data-revisions.html>.

² Agricultural and Processed Food Products Export Development Authority (APEDA), www.apeda.gov.in

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2009/2010

Region	Organic agr. land (hectares) 2009	Organic agr. land (hectares) 2010	+/- in hectares	+/- percent
Africa	1'026'633	1'075'829	+49'197	+4.8
Asia	3'568'227	2'778'291	-789'936	-22.1
Europe	9'203'603	10'002'087	+798'484	+8.7
Latin America	8'493'966	8'389'459	-104'507	-1.2
Northern America*	2'652'624	2'652'624	0	0.0
Oceania	12'152'106	12'144'984	-7'121	-0.1
Total*	37'094'096	37'041'004	-53'091	-0.1

Source: FiBL-IFOAM Survey 2012, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex.

* For the United States the latest available data are from 2008, for Canada from 2009, hence no change.

** Total includes correction value for French Overseas Departments.

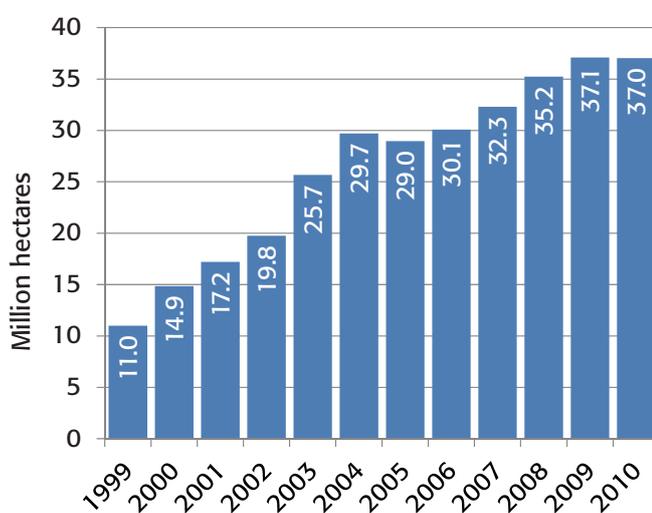


Figure 5: World: Growth of the organic agricultural land 1999-2010

Source: FiBL, IFOAM, and SOEL 2000-2012

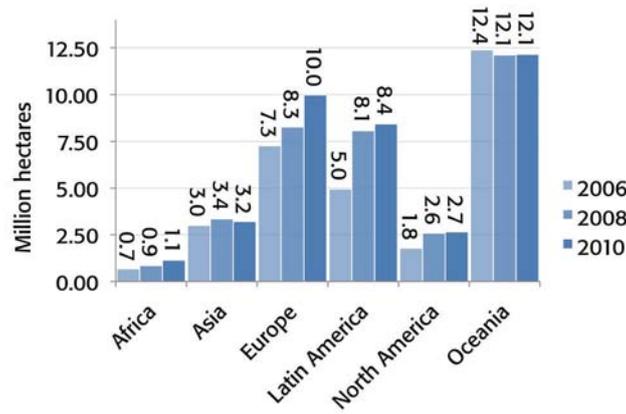


Figure 6: Growth of the organic agricultural land by region 2006 to 2010

Source: FiBL, IFOAM, and SOEL 2000-2012

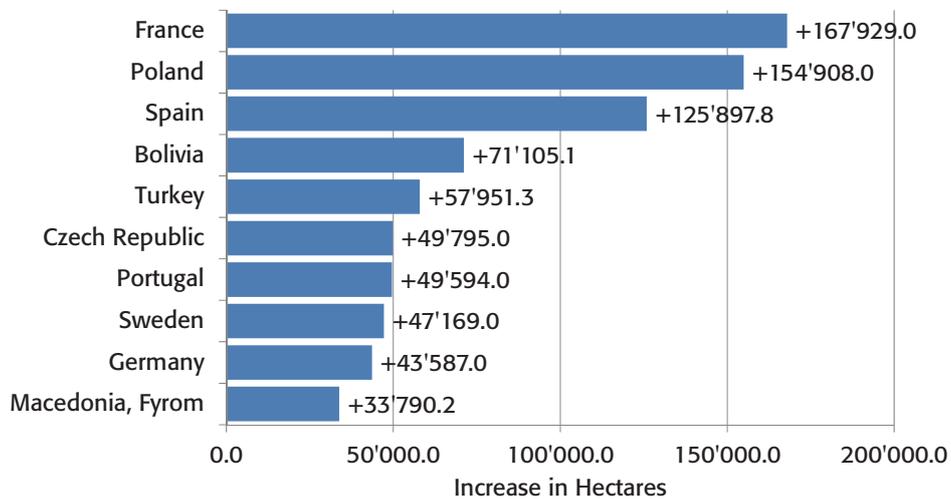


Figure 7: World: The ten countries with the largest increase of organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex.

Table 7: World: Development of organic agricultural land (including in-conversion area) by country 2007-2010

Important note: A direct year-to-year comparison is not always possible for many countries, as the data sources may have changed over the years or data access becomes better.

Data for 2010 were not available for all countries, for the actual data year of the 2010 data see Table 86: Organic agricultural land, share of total agricultural land and number of producers and domestic sales 2010, page 308.

The figures published here may differ from previously published data, due to data revisions.

Country	2007 [ha]	2008 [ha]	2009 [ha]	2010 [ha]	Change in hectares 09/10	Change 09/10 %
Afghanistan	22	42	63	61	-2	-2.7
Albania	260	601	271	284	13	4.8
Algeria	1'550	1'042	622	622	0	0.0
Andorra			2	2	0	0.0
Angola			2'486		-2'486	-100.0
Argentina	2'777'959	4'007'026	4'327'372	4'177'653	-149'719	-3.5
Armenia	336	600	600	750	150	25.0
Australia	11'988'044	11'988'044	12'001'724	12'001'724	0	0.0
Austria	482'337	492'632	518'757	543'605	24'848	4.8
Azerbaijan	21'240	21'240	20'339	21'347	1'008	5.0
Bangla Desh		526	1'162	799	-364	-31.3
Belarus						
					Wild collection only	
Belgium	32'628	35'721	41'459	49'005	7'546	18.2
Belize	1'810	852	1'177	1'177	0	0.0
Benin	1'488	1'030	872	1'167	296	34.0
Bhutan		59		59	Wild collection only	
					0	
Bolivia	41'004	41'004	41'004	112'109	71'105	173.4
Bosnia and Herzegovina	691	691	580	580	0	0.0
Brazil	1'765'793	1'765'793	1'765'793	1'765'793	0	0.0
Bulgaria	13'646	16'663	12'320	25'648	13'328	108.2
Burkina Faso	7'267	16'424	14'693	13'802	-891	-6.1
Burundi		350	350	350	0	0.0
Cambodia	4'320	8'810	10'725	8'084	-2'640	-24.6
Cameroon	336	370	292	496	204	69.9
Canada	556'273	628'556	703'678	703'678	0	0.0
Chad						
					Wild collection only	
Channel Islands		430	370	370	0	0.0
Chile	12'568	13'774	82'327	31'696	-50'631	-61.5
China	1'553'000	1'853'000	1'853'000	1'390'000	-463'000	-25.0
Colombia	44'296	47'107	47'776	33'334	-14'442	-30.2
Comoros		1'059	1'330	1'045	-285	-21.4

Country	2007 [ha]	2008 [ha]	2009 [ha]	2010 [ha]	Change in hectares 09/10	Change 09/10 %
Cook Islands				18	18	
Costa Rica	7'874	8'004	8'052	11'114	3'062	38.0
Côte d'Ivoire	943	2'938	17'443	18'133	690	4.0
Croatia	7'561	10'010	14'194	23'352	9'158	64.5
Cuba	14'314	14'314	14'314	14'314	0	0.0
Cyprus	2'322	2'322	3'575	3'575	0	0.0
Czech Republic	312'890	341'632	398'407	448'202	49'795	12.5
Democratic Republic of the Congo	6'068	7'852	6'667	32'523	25'856	387.8
Denmark	142'857	150'104	156'433	162'903	6'470	4.1
Dominican Republic	123'089	123'089	161'098	165'109	4'011	2.5
Ecuador	49'196	71'066	69'358	64'751	-4'607	-6.6
Egypt	19'206	40'000	56'000	82'167	26'167	46.7
El Salvador	7'478	6'736	6'736	6'736	0	0.0
Estonia	79'530	87'346	95'167	112'972	17'805	18.7
Ethiopia	140'305	99'944	122'727	137'196	14'469	11.8
Falkland Islands (Malvinas)		414'474	395'935	398'806	2'871	0.7
Faroe Islands	12	12	12	253	241	2008.3
Fiji	100	100	100	100	0	0.0
Finland	148'760	150'374	166'171	169'168	2'997	1.8
France	557'133	583'799	677'513	845'442	167'929	24.8
French Guiana (France)		2'385	2'651	1'776	-875	-33.0
French Polynesia				1'681	1'681	-
Gambia	86				0	-
Georgia	251	251	1'208	1'401	193	16.0
Germany	865'336	907'786	947'115	990'702	43'587	4.6
Ghana	24'449	26'657	29'140	12'635	-16'505	-56.6
Greece	279'895	317'824	326'252	309'823	-16'429	-5.0
Grenada			40	85	45	112.0
Guadeloupe (France)		67	84	27	-57	-67.9
Guatemala	7'285	7'285	13'300	13'375	75	0.6
Guinea-Bissau	5'600	5'600			-	-
Guyana	109	75	4'249	4'249	0	0.0
Haiti			54	188	134	249.0
Honduras	8'178	8'448	11'801	17'825	6'024	51.0
Hungary	122'270	122'816	140'292	127'605	-12'687	-9.0
Iceland	6'229	6'970	6'661	5'806	-855	-12.8
India	1'030'311	1'018'470	1'180'000	780'000	-400'000	-33.9
Indonesia	57'184	42'087	46'720	71'208	24'489	52.4

Country	2007 [ha]	2008 [ha]	2009 [ha]	2010 [ha]	Change in hectares 09/10	Change 09/10 %
Iran	913	11'745	8'853	7'256	-1'597	-18.0
Ireland	41'122	44'751	47'864	47'864	0	0.0
Israel	5'693	6'400	6'969	8'794	1'825	26.2
Italy	1'150'253	1'002'414	1'106'684	1'113'742	7'058	0.6
Jamaica	437	483	542	542	0	0.0
Japan	6'626	9'092	9'067	9'067	0	0.0
Jordan	1'047	1'053	1'053	1'469	416	39.5
Kazakhstan	2'393	157'176	134'862	133'562	-1'300	-1.0
Kenya	4'636	5'159	4'227	4'842	615	14.5
Kyrgyzstan	15'148	9'868	11'415	15'040	3'625	31.8
Lao People's Democratic Republic		1'537	4'878	4'885	6	0.1
Latvia	150'505	161'625	160'175	166'320	6'145	3.8
Lebanon	1'946	2'180	3'332	1'227	-2'105	-63.2
Lesotho		355	330		-330	-100.0
Liechtenstein	1'048	1'053	1'005	1'020	15	1.5
Lithuania	120'418	122'200	129'055	143'644	14'589	11.3
Luxembourg	3'380	3'535	3'614	3'720	107	2.9
Madagascar	9'456	19'914	14'069	20'288	6'219	44.2
Malawi	325	819	994	824	-171	-17.2
Malaysia	1'540	1'582	1'582	1'582	0	0.0
Mali	3'402	9'107	21'681	15'199	-6'482	-29.9
Malta	12	12	26	24	-2	-8.5
Martinique (France)		188	140	193	53	37.9
Mauritius			6	35	29	483
Mexico	393'461	332'485	332'485	332'485	0	0.0
Moldova	11'695	11'695	32'105	32'105	0	0.0
Montenegro	25'051	1'876	4'603	3'561	-1'042	-22.6
Morocco	3'590	3'450	3'800	17'030	13'230	348.2
Mozambique	728	2'810	1'556	5'519 ¹	3'963	254.8
Myanmar ²			555	60	-495	-89.2
Namibia	80	410	124	124	0	0.0
Nepal	8'194	8'498	8'059	9'789	1'731	21.5
Netherlands	47'019	50'434	51'911	46'233	-5'678	-10.9
New Zealand	63'883	100'000	124'464	124'464	-1	0.0
Nicaragua	70'972	70'972	33'621	33'621	0	0.0
Niger	131	355	355	48	-307	-86.5
Nigeria	3'154	3'073	8'202	11'979	3'777	46.0

¹ Data partly based on FiBL estimate

² A direct year-to-year comparison is not possible due to different data sources.

STATISTICS: DEVELOPMENT OF THE ORGANIC AGRICULTURAL LAND

Country	2007 [ha]	2008 [ha]	2009 [ha]	2010 [ha]	Change in hectares 09/10	Change 09/10 %
Niue	159	159	159	159	0	0.0
Norway	48'863	52'248	56'737	57'219	482	0.8
Occupied Palestinian Territory	3'366	1'001	1'000	6'354	5'354	535.4
Oman		34	39	39	0	0.0
Pakistan	25'001	24'466	20'321	22'103	1'782	8.8
Panama	5'244	5'244	5'244	3'242	-2'002	-38.2
Papua New Guinea	2'497	2'497	3'321	3'156	-165	-5.0
Paraguay	51'190	51'190	51'190	51'190	0	0.0
Peru	104'714	146'438	186'314	216'756	30'442	16.3
Philippines	15'344	15'795	51'806	79'992	28'186	54.4
Poland	285'878	313'944	367'062	521'970	154'908	42.2
Portugal	229'717	211'071	151'460	201'054	49'594	32.7
Republic of Korea	9'729	12'033	13'343	15'518	2'175	16.3
Réunion (France)		203	188	276	88	46.8
Romania	131'401	140'132	168'288	182'706	14'418	8.6
Russian Federation	33'801	46'962	78'449	44'017	-34'432	-43.9
Rwanda	512	3'508	3'697	3'600	-97	-2.6
Samoa	7'243	7'243	9'714	9'714	0	0.0
Sao Tome and Principe	2'862	2'859	3'591	4'411	820	22.8
Saudi Arabia	22'215	30'000	46'635	42'376	-4'259	-9.1
Senegal	1'589	25'992	25'351	28'175	2'824	11.1
Serbia	830	4'494	8'661	8'635	-26	-0.3
Sierra Leone		960	72'472	65'252	-7'220	-10.0
Slovakia	117'906	140'755	145'490	174'471	28'981	19.9
Slovenia	29'322	29'838	29'388	30'696	1'308	4.5
Solomon Islands	3'628	3'628	3'628	1'306	-2'322	-64.0
Somalia		274			0	-
South Africa	50'012	43'882	59'562	55'621	-3'941	-6.6
Spain	804'884	1'129'844	1'330'774	1'456'672	125'898	9.5
Sri Lanka	17'000	22'347	21'156	43'664	22'508	106.4
Sudan	56'324	65'188	77'798	53'602	-24'196	-31.1
Suriname	40	40	8	11	3	37.5
Swaziland	3	18	46	6	-40	-87.3
Sweden	308'273	336'439	391'524	438'693	47'169	12.0
Switzerland	116'641	116'266	114'050	119'613	5'563	4.9
Syrian Arab Republic	28'461	25'660	35'439	19'987	-15'452	-43.6
Taiwan	2'013	2'356	2'962	2'962	0	0.0
Tajikistan		70	70	391	321	459.0
Thailand	19'156	16'955	30'755	34'079	3'324	10.8

Country	2007 [ha]	2008 [ha]	2009 [ha]	2010 [ha]	Change in hectares 09/10	Change 09/10 %
The former Yugoslav Republic of Macedonia	1'333	3'380	1'374	35'164	33'790	2459.6
Timor-Leste	23'790	26'101	24'997	24'750	-247	-1.0
Togo	2'545	2'977	1'789	3'409	1'620	90.6
Tunisia	154'793	174'725	167'302	175'066	7'764	4.6
Turkey	124'263	109'387	325'831	383'782	57'951	17.8
Uganda	296'203	212'304	226'954	228'419	1'465	0.6
Ukraine	249'872	269'984	270'193	270'226	33	0.0
United Arab Emirates	5	310	373	360	-13	-3.6
United Kingdom	682'196	737'631	721'726	699'638	-22'088	-3.1
United Republic of Tanzania	62'180	72'188	72'188	72'665	477	0.7
United States of America	1'736'084	1'948'946	1'948'946	1'948'946	0	0.0
Uruguay	930'965	930'965	930'965	930'965	0	0.0
Uzbekistan	1'854	2'530	324	65	-259	-79.9
Vanuatu	8'996	8'996	8'996	2'664	-6'332	-70.4
Venezuela	2'441	2'441	337	337	0	0.0
Viet Nam	12'120	12'622	14'012	19'272	5'260	37.5
Zambia	2'530	3'602	7'310	7'310	0	0.0
Zimbabwe		266	421	1'995	1'574	374
Total*	32'309'993	35'231'132	37'093'53	37'041'004	-53'091	-0.1

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

*Total includes correction value for French overseas departments.

All organic areas, including non-agricultural 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 for aquaculture, forest areas, and grazing areas on non-agricultural land. According to the FiBL-IFOAM survey, the total area for these areas was 43 million hectares, and all organic areas together constituted 80 million hectares.

It should be noted, that many countries do not report the non-agricultural organic areas; they only communicate the organic agricultural land.

Almost all the non-agricultural areas are for wild collection and beekeeping. More information on the use of the wild collection areas is available in the corresponding chapter (page 80).

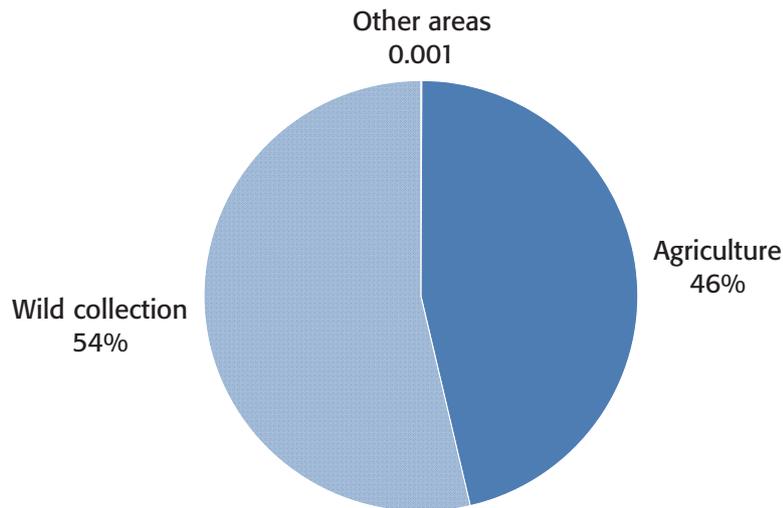


Figure 8: World: Distribution of all organic areas 2010. Total: 80 million hectares

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307

Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2010

Region	Agricultural land and crops [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non-agricultural land [ha]	Wild collection* [ha]	Other non-agricultural land [ha]	Total [ha]
Africa	1'075'829		185		16'364'414		17'440'429
Asia	2'778'291	19'461	109	483	4'821'377		7'619'721
Europe	10'002'087		10'265	15'224	13'360'526	5'727	23'393'828
Latin America	8'389'459	4'469	0		8'194'649		16'588'578
North America	2'652'624				210'231		2'862'855
Oceania	12'144'984				550		12'145'534
Total	37'041'004	23'930	10'559	15'707	42'951'747	5'727	80'048'675

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307

* Wild collection and beekeeping

Table 9: World: All organic areas by country 2010

Country	Agricultural land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non-agricultural land [ha]	Wild collection ¹ [ha]	Other non-agricultural land [ha]	Total [ha]
Afghanistan	61						61
Albania	284				251'717		252'001
Algeria	622				1'004		1'626
Andorra	2						2
Argentina	4'177'653				725'152		4'902'805
Armenia	750				500		1'250
Australia	12'001'724						12'001'724
Austria	543'605						543'605
Azerbaijan	21'347		109		399		21'855
Bangla Desh	799	7'717					8'516
Belarus ²							
Belgium	49'005						49'005
Belize	1'177						1'177
Benin	1'167						1'167
Bhutan					15'604		15'604
Bolivia	112'109				828'606		940'715
Bosnia and Herzegovina	580				220'000		220'580
Brazil	1'765'793	2'700			6'200'380		7'968'873
Bulgaria	25'648				546'194		571'842
Burkina Faso	13'802				56'309		70'111
Burundi	350						350
Cambodia	8'084						8'084
Cameroon	496				6'000'000		6'000'496
Canada	703'678				210'231		913'909

¹ Includes areas for beekeeping

² For Belarus only the production volume in tons, but no area data were available.

Country	Agricultural land [ha]	Aquaculture [ha]	Forest [ha]	Grazed non agricultural land [ha]	Wild collection ¹ [ha]	Other non agricultural land [ha]	Total [ha]
Chad					2'000		2'000
Channel Islands	370						370
Chile	31'696				119'087		150'783
China	1'390'000				900'000		2'290'000
Colombia	33'334				6'855		40'189
Comoros	1'045				385		1'430
Cook Islands	18						18
Costa Rica	11'114						11'114
Côte d'Ivoire	18'133				500		18'633
Croatia	23'352				7'000		30'352
Cuba	14'314						14'314
Cyprus	3'575			261			3'836
Czech Republic	448'202						448'202
Democratic Republic of the Congo	32'523						32'523
Denmark	162'903						162'903
Dominican Republic	165'109						165'109
Ecuador	64'751	1'760			9'680		76'191
Egypt	82'167						82'167
El Salvador	6'736						6'736
Estonia	112'972			8'842			121'815
Ethiopia	137'196				458		137'654
Falkland Islands (Malvinas)	398'806						398'806
Faroe Islands	253						253
Fiji	100				50		150
Finland	169'168				7'800'224		7'969'392
France	845'442						845'442
French Guiana (France)	1'776						1'776
French Polynesia	1'681				500		2'181
Georgia	1'401				865		2'267
Germany	990'702						990'702
Ghana	12'635				19'551		32'185
Greece	309'823						309'823
Grenada	85						85
Guadeloupe (France)	27						27
Guatemala	13'375						13'375
Guyana	4'249				59'930		64'179
Haiti	188						188
Honduras	17'825	5					17'830
Hungary	127'605						127'605
Iceland	5'806		288		212'439		218'533
India	780'000				3'650'000		4'430'000

Country	Agricultural land [ha]	Aquaculture [ha]	Forest [ha]	Grazed non agricultural land [ha]	Wild collection ¹ [ha]	Other non agricultural land [ha]	Total [ha]
Indonesia	71'208	94			32'700		104'002
Iran (Islamic Republic of)	7'256				38'200		45'456
Ireland	47'864						47'864
Israel	8'794						8'794
Italy	1'113'742						1'113'742
Jamaica	542				0		542
Japan	9'067			483			9'550
Jordan	1'469						1'469
Kazakhstan	133'562				1'300		134'862
Kenya	4'842				99'903		104'745
Kiribati							
Kuwait							
Kyrgyzstan	15'040						15'040
Lao People's Democratic Republic	4'885						4'885
Latvia	166'320						166'320
Lebanon	1'227						1'227
Lesotho					45'000		45'000
Liechtenstein	1'020						1'020
Lithuania	143'644						143'644
Luxembourg	3'720						3'720
Madagascar	20'288				44'962		65'249
Malawi	824		185		5'346		6'354
Malaysia	1'582						1'582
Mali	15'199						15'199
Malta	24						24
Martinique (France)	193						193
Mauritius	35						35
Mexico	332'485				58'530		391'015
Moldova	32'105				2'080		34'185
Montenegro	3'561				101'801		105'362
Morocco	17'030				618'200		635'230
Mozambique ¹	5'519						5'519
Myanmar	60						60
Namibia	124				3'000'000		3'000'124
Nepal	9'789				24'922		34'711
Netherlands	46'233						46'233
New Zealand	124'463						124'463
Nicaragua	33'621				11'463		45'084
Niger	48						48
Nigeria	11'979						11'979
Niue	159						159
Norway	57'219						57'219

¹ Data partly based on a FiBL estimate

Country	Agricultural land [ha]	Aquaculture [ha]	Forest [ha]	Grazed non agricultural land [ha]	Wild collection ¹ [ha]	Other non agricultural land [ha]	Total [ha]
Occupied Palestinian Territory	6'354						6'354
Oman	39						39
Pakistan	22'103						22'103
Palau							
Panama	3'242						3'242
Papua New Guinea	3'156						3'156
Paraguay	51'190						51'190
Peru	216'756	4	0		172'666		389'426
Philippines	79'992						79'992
Poland	521'970						521'970
Portugal	201'054		9'977				211'031
Republic of Korea	15'518						15'518
Réunion (France)	276						276
Romania	182'706				77'294		260'000
Russian Federation	44'017				2'180'040		2'224'057
Rwanda	3'600				79		3'679
Samoa	9'714						9'714
San Marino							
Sao Tome and Principe	4'411						4'411
Saudi Arabia	42'376						42'376
Senegal	28'175				432		28'607
Serbia	8'635				817'128		825'763
Seychelles							
Sierra Leone	65'252						65'252
Singapore							
Slovakia	174'471						174'471
Slovenia	30'696						30'696
Solomon Islands	1'306						1'306
Somalia							
South Africa	55'621				51'218		106'839
Spain	1'456'672				181'757		1'638'429
Sri Lanka	43'664						43'664
Sudan	53'602				122'000		175'602
Suriname	11						11
Swaziland	6						6
Sweden	438'693						438'693
Switzerland	119'613			6'121		5'727	131'461
Syrian Arab Republic	19'987				8'000		27'987
Taiwan	2'962						2'962
Tajikistan	391						391

Country	Agricultural land [ha]	Aquaculture [ha]	Forest [ha]	Grazed non agricultural land [ha]	Wild collection ¹ [ha]	Other non agricultural land [ha]	Total [ha]
Thailand	34'079				701		34'780
The former Yugoslav Republic of Macedonia	35'164				556'600		591'764
Timor-Leste	24'750						24'750
Togo	3'409				650		4'059
Tunisia	175'066				228'089		403'155
Turkey	383'782				126'251		510'033
Turkmenistan							
Uganda	228'419				158'328		228'419
Ukraine	270'226				280'000		550'226
United Arab Emirates	360						360
United Kingdom	699'638						699'638
United Republic of Tanzania	72'665						72'665
United States of America	1'948'946						1'948'946
Uruguay	930'965				2'300		933'265
Uzbekistan	65				145'621		145'686
Vanuatu	2'664						2'664
Venezuela	337						337
Viet Nam	19'272	11'650			2'565		33'487
Zambia	7'310				5'910'000		5'917'310
Zimbabwe	1'995						1'995
Total	37'041'004	23'930	10'559	15'707	42'951'748	5'727	80'048'675

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

Organic producers and other operator types 2010

Producers

For the current survey, a total of almost 1.6 million organic producers was reported. According to the data obtained, more than three quarters of the producers are in Asia, Africa, and Latin America (see Figure 9). The country with the most producers is India, followed by Uganda and Mexico (see Figure 10).

Compared with 2009, there has been a decrease of 240'000 producers or 13 percent. This decrease is mainly due to a huge decrease of organic farms in India—it should be noted, however, that India is still the country with the most producers. The second region, from which fewer farmers were reported, is Latin America: Peru has fewer producers than in 2009.

In India, the number of organic producers almost decreased by half in 2010, after having doubled in 2009. The fact that the number of producers decreased so substantially in India (and therefore globally) has a number of reasons, which are described in the chapter on the development of organic agricultural land on page 47 as well as in the chapter about organic agriculture in Asia (page 170).

To find precise figures on the number organic farms remains difficult, as

- 1) Some countries report only the numbers of companies, projects or grower groups, which may each comprise a number of producers;
- 2) Some countries do not provide data on the producers at all;
- 3) Some countries with wild collection areas include collectors; and
- 4) Some countries provide the number of producers per crop, and there may be overlaps for those growers who grow several crops. The number of producers should therefore be treated with caution, and it may be assumed that the total number of organic producers is higher than reported here.

Table 10: World: Development of the numbers of producers by region 2009 to 2010

Continent	2009	2010	Change in numbers	Change in %
Africa	517'156	542'839	25'683	5.0
Asia	728'264	460'762	-267'508	-36.7
Europe	257'641	277'362	19'721	7.7
Latin America	284'365	272'232	-12'133	-4.3
Northern America	17'069	16'870	-199	-1.2
Oceania	8'466	8'483	17	0.2
Total	1'812'840	1'578'407	-234'439	-12.9

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307

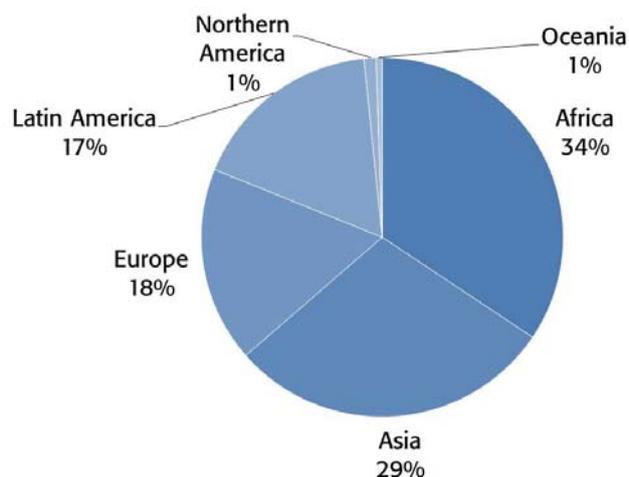


Figure 9: World: Distribution of organic producers by geographical region 2010 (Total: 1.6 million producers)

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307

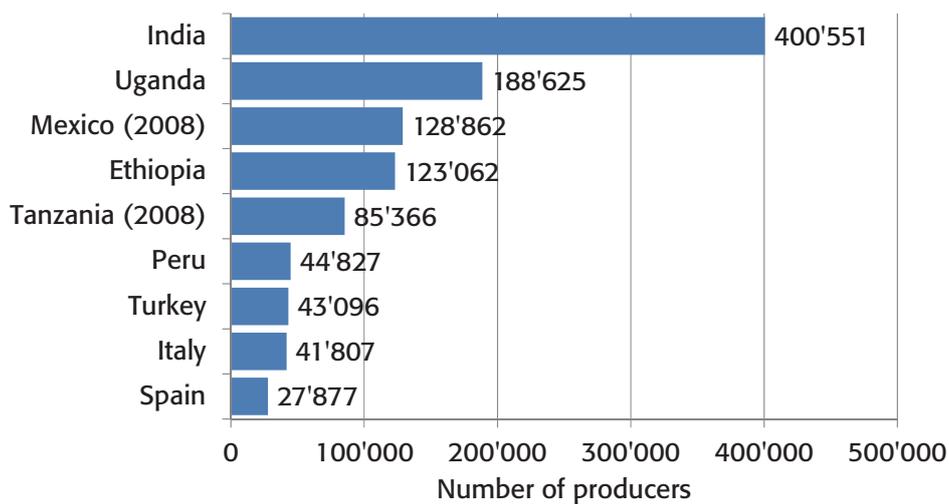


Figure 10: World: The countries with the highest numbers of organic producers 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Further operator types

Regarding data on further operator types, it can be said that there are at least 39'000 processors and that there are at least 1'800 importers, most of these in Europe. However, not all countries reported the number of processors, exporters, importers or other operator types. For instance, data for the United States are missing, and it may be assumed that the number of processors and importers is far higher.

Further operator types reported to FiBL and IFOAM were beekeepers, exporters, smallholder groups, and aquaculture enterprises, as well as the number of collectors (wild collection).

Table 11: World: Organic producers and other operator types by country 2010

We are doing our best to ensure that this overview table, for the first time published in the 2011 edition of "The World of Organic Agriculture", will be more comprehensive in the future. For many countries (particularly those with no private or governmental data collection system), data on the various operator types are missing or are incomplete, and only the number of producers or of all operators is available.

Country	Producers	Processors	Exporters	Importers
Afghanistan	264		1	
Albania	110	25	18	
Algeria	81			
Andorra				
Argentina	1'856			
Armenia	34	7		
Australia	2'129			
Austria	22'132			
Azerbaijan	288	28		
Bangla Desh	2		2	
Belarus		2		
Belgium	1'108	673		42
Belize	2'017			
Benin	1'992			
Bolivia	11'646			
Bosnia and Herzegovina	27	27		
Brazil	7'250			
Bulgaria	709	72	7	1
Burkina Faso	14'026	23	30	
Burundi	35			
Cambodia	7'498	2	3	
Cameroon	763	11	11	
Canada	3'929	1'871		
Chad				
Chile	529	75	58	
Colombia	4'775	30	10	0
Comoros	958	4	4	
Cook Islands	12			
Costa Rica	3'000	43		
Côte d'Ivoire	735	9	7	
Croatia	1'125	204	9	30
Cuba	2'467			
Cyprus	732	53		

Country	Producers	Processors	Exporters	Importers
Czech Republic	3'517	626		39
Democratic Republic of the Congo	1'122	2	2	
Denmark	2'677	1'041		
Dominican Republic	23'376	27	21	4
Ecuador	13'114			
Egypt	790			
El Salvador	2'000			
Estonia	1'356	43		
Ethiopia	123'062	3	10	
Falkland Islands (Malvinas)	8			
Faroe Islands				
Fiji				
Finland	4'022	255		22
France	20'604	7'427		212
French Guiana (France)	27	2		
French Polynesia	17			
Georgia	64			
Germany	21'942	8'511		274
Ghana	2'327	15	15	
Greece	21'274	1'557		5
Grenada	3			
Guadeloupe (France)	26	4		
Guatemala	3'008	24	94	
Guyana	74			
Haiti	42			
Honduras	1'113	28	25	
Hungary	1'617	253		5
Iceland	38	25		1
India	400'551	299		
Indonesia	9'805	158		
Iran (Islamic Republic of)	3'014	3	35	
Ireland	1'366	192		28
Israel	401		34	
Italy	41'807	5'592		264
Jamaica	80			
Japan	2'137	1'788		151
Jordan	42			
Kazakhstan	8	2	2	
Kenya	12'647	9	5	
Kyrgyzstan	987	3		
Lao People's Democratic Republic	2'178	2		
Latvia	3'593	25		
Lebanon	172			
Lesotho				
Liechtenstein	31	2		
Lithuania	2'652	56		
Luxembourg	96	43		3
Madagascar	6'875			
Malawi	9'004	4		1
Malaysia	24	11		
Mali	27'711	9	5	
Malta	11	2		1

Country	Producers	Processors	Exporters	Importers
Martinique (France)	27	5		
Mauritius	2	2	1	
Mexico	128'862			
Moldova	166	1	4	
Montenegro	62			
Morocco	120			
Mozambique	6	3	3	
Myanmar	6			
Namibia	792	4		
Nepal	1'470			
Netherlands	1'462	949		259
New Zealand	1'000			
Nicaragua	10'060	30		
Niger				
Nigeria	517			
Niue	61			
Norway	2'805	561		55
Occupied Palestinian Territory	832			
Oman	4			
Pakistan	1'045	18		
Panama	9			
Papua New Guinea	4'559			
Paraguay	11'401			
Peru	44'827		153	
Philippines	3'006	16	21	
Poland	20'578	249		14
Portugal	2'434			
Republic of Korea	10'790			
Réunion (France)	61	7		
Romania	2'986	88		13
Russian Federation	50			
Rwanda	535			
Samoa	353	12		
Sao Tome and Principe	2'009	2	3	
Senegal	22'755	4	6	
Saudi Arabia	62			
Serbia	3'887			
Sierra Leone	22'512			
Singapore		2	1	
Slovakia	363	52		7
Slovenia	2'218	103		
Solomon Islands	352			
South Africa	242	71	7	1
Spain	27'877	2'747		93
Sri Lanka	398	61	6	
Sudan	1'003	4	6	
Suriname				
Swaziland				
Sweden	5'208	658		183
Switzerland	5'989			
Syrian Arab Republic	2'458			
Taiwan	1'277			

Country	Producers	Processors	Exporters	Importers
Tajikistan	75		1	
Thailand	7'405			
The former Yugoslav Republic of Macedonia	542	13		
Timor-Leste	72			
Togo	3'618	6	8	
Tunisia	2'487	182		
Turkey	43'096	173	27	31
Uganda	188'625			
Ukraine	142	14		7
United Arab Emirates	2	8	2	2
United Kingdom	4'949	2'177		95
United Republic of Tanzania	85'366			
United States of America	12'941			
Uruguay	630			
Uzbekistan	6	2	4	
Vanuatu				
Venezuela (Bolivarian Republic of)	4	3	3	
Viet Nam	4'385	34		
Zambia	10'055			
Zimbabwe	3			

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
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Market data

Whereas global trends and a global figure for the organic market is presented by Amarjit Sahota in this volume (page 122), we are showing the country-related data compiled by FiBL. For Europe, data collection is carried out in cooperation with the German AgrarmarktInformations-Gesellschaft (AMI) and the Organic Research Centre, UK (see also article on the European Market, page 206).

The countries with the largest market for organic food are the United States, followed by Germany and France. The highest per capita consumption in 2010 was in Switzerland, followed by Denmark and Luxembourg.

According to Organic Monitor, global sales with organic food and beverages reached 59.1 billion US dollars in 2010.

Table 12 lists the domestic sales and export data that were collected in the framework of the global survey on organic agriculture.

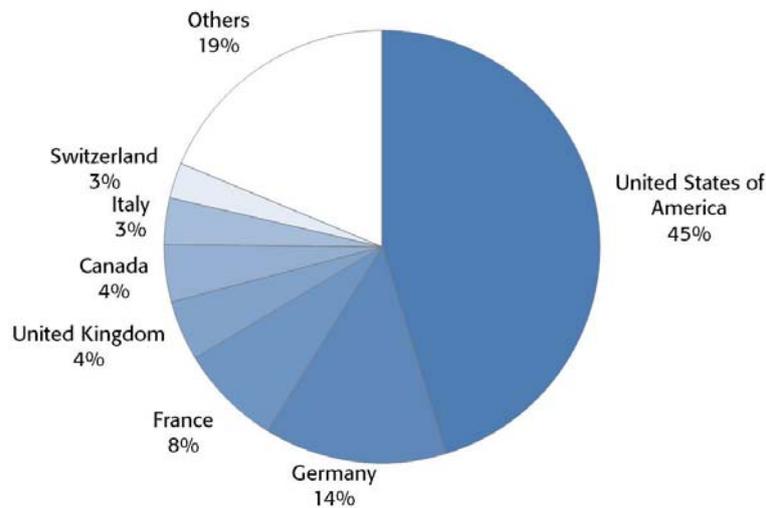


Figure 11: Global market of organic food: Distribution by country 2010

Source: FiBL Survey 2012, in cooperation with AMI (for Europe), based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 307.

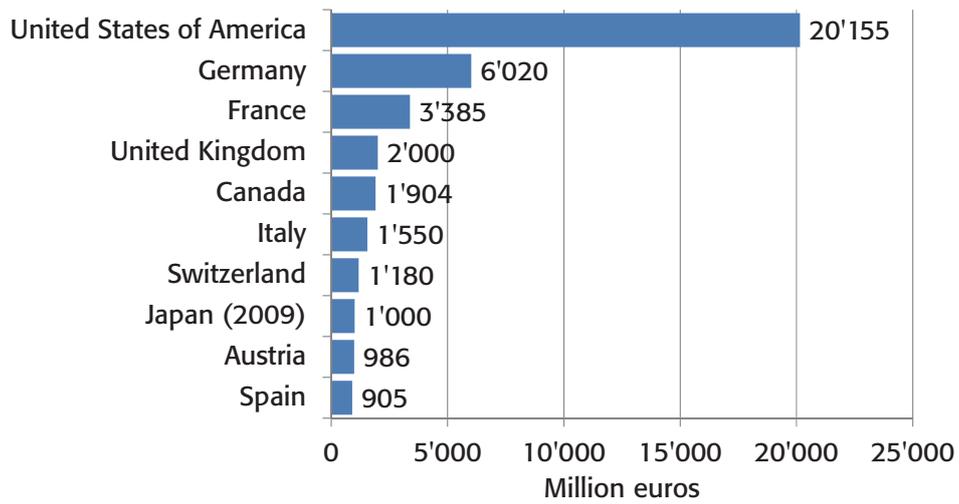


Figure 12: Global market: The countries with the largest markets for organic food 2010

Source: FiBL Survey 2012, in cooperation with AMI (for Europe), based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 307.

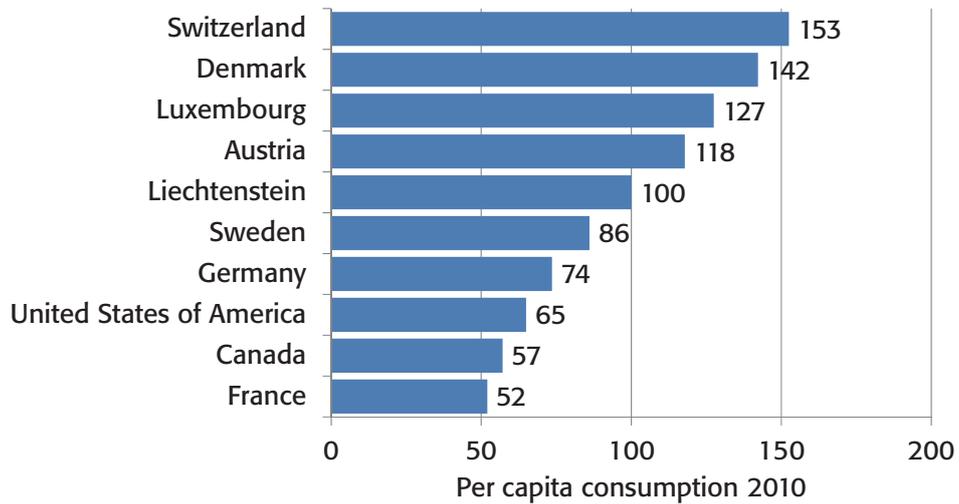


Figure 13: Global market: The countries with the highest per capita consumption 2010

Source: FiBL Survey 2012, in cooperation with AMI (for Europe), based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 307.

Table 12: Global market data: Domestic sales, per capita consumption, and exports by country 2010

It should be noted that for market and trade data, comparing country statistics remains very problematic, due to differing methods of data collection. Comments on this table should be sent to helga.willer@fibl.org. Revisions will be posted at <http://www.organic-world.net/statistics-data-revisions.html>.

Country	Data year	Sales [Mio €]	€/person	Exports [Mio €]
Argentina	2009			122
Australia	2007			123
	2009	536	25	
Austria	2010	986	118	76
Azerbaijan	2010	3	0	
Belgium	2010	421	39	
Bhutan	2007			0
Bolivia	2006			13
Bosnia and Herzegovina	2008			1
	2010	1	0	
Brazil	2010			188
Bulgaria	2010	7	1	
Cambodia	2009			1
Canada	2010	1'904	57	286
Chile	2009	2	0	38
China	2008			300
	2009	791	1	
Colombia	2007			13
Costa Rica	2008	1	0	
	2009			19
Croatia	2010	69	16	4
Cyprus	2006	2	2	
Czech Republic	2008			4
	2009	68	7	
Denmark	2010	791	142	115
Dominican Republic	2007			146
Estonia	2009	12	9	
Ethiopia	2010			26
Falkland Islands (Malvinas)	2009			2
Finland	2009			14
	2010	80	15	
France	2010	3'385	52	
Germany	2010	6'020	73.6	
Greece	2006	58	5	
Hungary	2009	25	3	20
India	2008	93	0	
	2010			119
Ireland	2010	103	23	

Italy	2010	1'550	30	1'050
Japan	2009	1'000	8	
Lao People's Democratic Republic	2009	1	0	
Liechtenstein	2009	3	100	
Luxembourg	2010	65	127	
Mexico	2008	21	0	310
Montenegro	2010	0	0	
Netherlands	2007			525
	2010	660	40	
New Zealand	2009	143	33	79
Norway	2010	114	24	
Peru	2010	14	0	167
Poland	2010	59	2	
Portugal	2010	22	2	
Republic of Korea	2008	226	8	
Romania	2010	45	2	
Russian Federation	2009	65	0	4
Samoa	2010	0	0	0
Serbia	2010	40	5	
Slovakia	2010	4	1	
Slovenia	2010	38	19	
Spain	2009	905	20	454
Sweden	2010	804	86	
Switzerland	2010	1'180	153	
Thailand	2009	51	1	51
Tunisia	2010			34
Turkey	2009	4	0	20
Uganda	2010			32
Ukraine	2010	2	0	
United Kingdom	2010	2'000	32	
United States of America	2010	20'155	65	

Source: FiBL Survey 2012, in cooperation with AMI (for Europe), based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 307.

Organic farming in developing countries and in emerging markets

For this section, the countries listed on the Development Assistance Committee (DAC) list of recipients for Official Development Assistance (ODA) from the Organization for Economic Cooperation and Development (OECD) were analyzed.¹ For the DAC countries, more than 1.3 million producers were counted, constituting more than 80 percent of all producers. A bit less than one-third of the world's organic agricultural land—12.5 million hectares—is located in countries listed on the DAC list. If wild collection and beekeeping areas are included, the total area is 44.3 million hectares. Most of the agricultural land is in Latin American countries (8 million hectares), with Asia (2.7 million) and Africa (1.1 million) in second and third place. The countries with the largest areas under organic management are (from most to least) Argentina, Brazil, China, Uruguay, and India. Not surprisingly, most of them are all large countries.

However, when it comes to land under organic management as a percentage of total area under agriculture, the order is totally different. The highest percentages of organic agricultural land are in the Dominican Republic, several Pacific Island countries, and Timor Leste. Argentina, with by far the largest area under organic management (with 4.2 million hectares), is ranked eighth when organic agricultural area is measured relative to total agricultural area. In the top ten developing countries, the shares of organic land are comparable to those in many European countries. These high shares can probably be attributed in part to a high potential for and focus on exports. Support activities may also play a role. However, out of all countries on the DAC list covered in the survey, only a few have a share of organic agricultural land that is higher than one percent of total agricultural area. Thus, compared with developed countries, organic farming lags behind in most developing, transition, and emerging market countries.

Land use details were available only for 72.2 percent of the agricultural land; crop data are missing for some of the world's largest producing countries (China and India, for Brazil these were estimated). However, the available statistics show that the shares of grassland/grazing areas and of permanent crops are relatively high as compared with Europe and North America. Arable land, by contrast, is of minor importance. This can be attributed to the fact that export plays an important role—either for meat products (mainly from Latin America) or for permanent crops. The most important permanent crops are export crops, such as coffee, olives, cocoa, and sugarcane.

Table 13: Countries on the DAC list: Development of organic agricultural land 2005-2010

	2005	2006	2007	2008	2009	2010
Africa	489'949	684'803	862'351	857'459	1'026'445	1'075'553
Asia	2'646'084	2'964'020	2'842'948	3'285'251	3'487'271	2'697'746
Europe	351'739	388'027	421'556	412'117	657'812	757'690
Latin America	5'056'158	4'950'560	6'420'418	7'654'832	8'095'156	7'988'657
Oceania	100	22'623	22'623	22'623	25'918	17'117
Total	8'544'029	9'010'033	10'569'896	12'232'282	13'292'601	12'536'763

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

¹ The list is available at http://www.oecd.org/document/45/0,3746,en_2649_34447_2093101_1_1_1_1,00.html

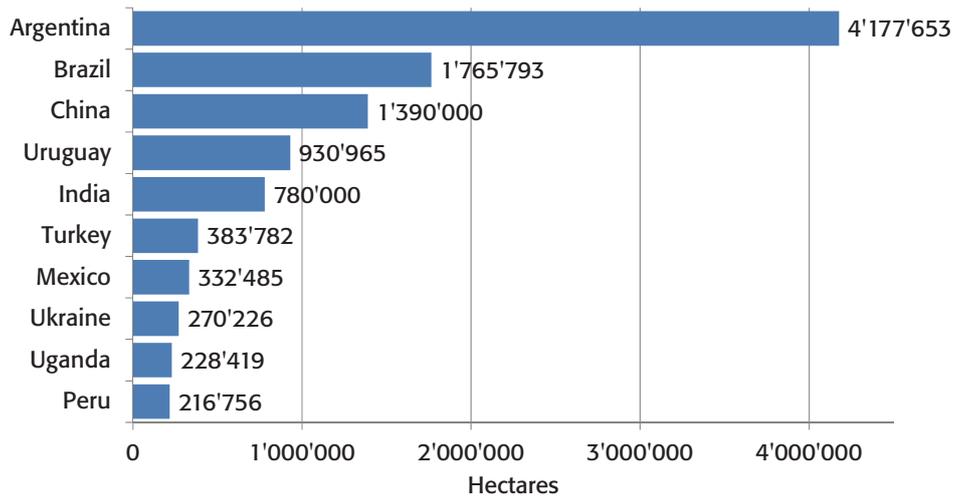


Figure 14: Countries on the DAC list: the countries with the largest organic agricultural land in 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

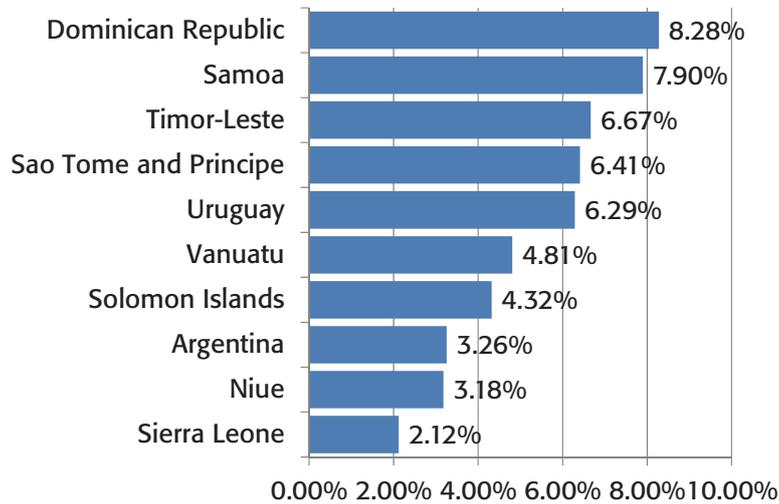


Figure 15: Countries on the DAC list: the countries with the highest shares of organic agricultural land in 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Land use and crop data

Almost two-thirds of the organic agricultural land of 37 million hectares in 2010 were grassland/grazing areas (23.7 million hectares). The cropland area (arable land with 6.1 million hectares and permanent crops with 2.7 million hectares) constitute 9.8 million hectares and thus more than a quarter of the organic agricultural land. The cropland area is probably much higher, as for some countries with large organic agricultural areas (e.g., China India), details on land use are not available. General land use information was available for almost 90 percent of the organic agricultural land, which does not, however, mean that detailed crop information is available for all areas as not all countries provided detailed crop data.¹

For this survey, the FAO classification² of land use types is utilized, with slight modifications. For the classification of crops, a system similar to that of Eurostat was used.³ The following main levels were used to classify the land use data: **arable land; permanent crops; cropland for which no further details were available** (cropland=arable land + permanent cropland with no details available); **permanent grassland/grazing areas; other agricultural areas** (like for instance hedges); and **agricultural land for which no details** were available at all. Aquaculture, forest, and grazed non-agricultural land were distinguished from “agricultural land” with a separate category, as were organic wild collection areas.

By geographical region the land use information can be summarized as follows:

- Africa: For Africa, land use information covering about one third of the organic agricultural land was available. About half of the agricultural land is used for permanent crops. The main permanent crops are cash crops like coffee and olives. For land use details in Africa see page 163.
- Asia: Some land use details are known for two thirds of the organically managed land in Asia. Arable land is mainly used for cereals, including rice. Furthermore, cotton is important; India and Syria are two of the leading organic cotton producers. For land use details in Asia see page 193.
- Europe: In Europe, the agricultural land uses are relatively well known, and the main crop categories are well documented. Permanent pastures and arable land have approximately equal shares of the organic agricultural area. The arable land is mainly used for cereals (1.7 million hectares), followed by the cultivation of green fodder (1.4 million hectares). Permanent crops account for eleven percent of organic agricultural land. More than one third of this land is used for olives, followed by grapes, nuts, and fruits. For land use details in Europe see page 228.
- Latin America and the Caribbean: Most of the organically managed land in Latin America for which information was available is permanent pasture. Permanent crops account for about one tenth of the agricultural area. About half of the permanent cropland is used for coffee, followed by cocoa and tropical fruits. For land use details in Latin America and the Caribbean see page 256.

¹ For some countries, only information on the main uses (arable crops, permanent crops, and permanent grassland) was available. For other countries, very detailed statistical land use information can be found. The Eurostat statistics, for instance, list each vegetable type for many countries.

² For more details, see the FAOSTAT homepage, faostat.fao.org at Home > Concepts and Definitions > Glossary, or <http://faostat.fao.org/site/379/DesktopDefault.aspx?PageID=379>

³ For details, see www.organic-world.net. For the data collected, a classification system developed in cooperation with AMI, the German Agricultural Market Information Company, is used. The questionnaire as well as some background information is also available at www.organic-world.net.

- North America: As in Europe, arable land and permanent grassland have almost equal shares. A major part of the arable land is used for cereal production. For land use details in North America see page 283.
- Oceania: Most of the land in Australia is used for extensive grassland/grazing areas. Little or no information is available about the remaining land. For land use details in Oceania see page 297.

Table 14: World: Land use in organic agriculture by region (including in-conversion areas) 2010

Land use	Africa	Asia	Europe	Latin America	Oceania	Northern America	Total
Agricultural land and crops, no details	394'821	1'725'303	143'742	1'382'758	318'125	12'321	3'974'799
Arable crops	100'139	186'053	4'058'385	412'349	38'062	1'311'143	6'106'131
Cropland, no details	6'373	28'151	39'341	7'234	7'956	97'561	186'616
Other agricultural land	58'406	449	276'965	30'001	7'702	23'338	396'860
Permanent crops	485'739	237'878	983'783	866'086	20'754	64'572	2'658'811
Permanent grassland/grazing	30'351	600'457	4'499'872	5'691'032	11'752'386	1'143'689	23'717'788
Total*	1'075'829	2'778'291	10'002'087	8'389'459	12'144'984	2'652'624	37'041'004

Source: FiBL-IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Totals include correction values for some countries for land with double use during one year.

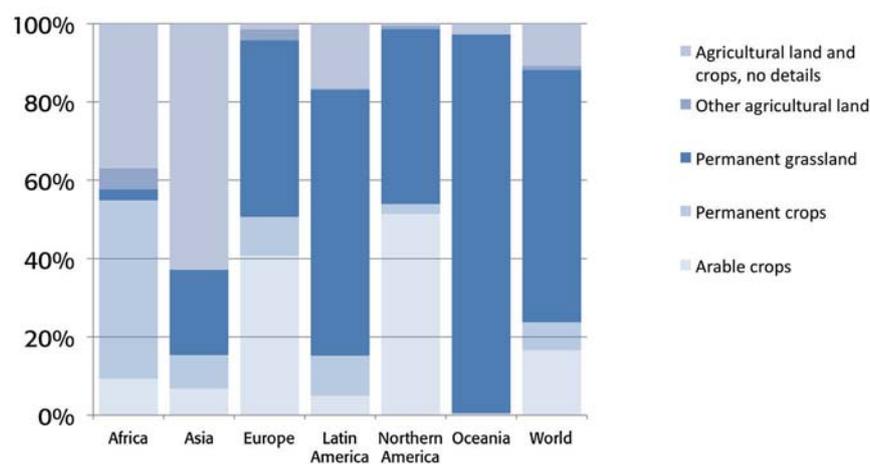


Figure 16: World: Distribution of main land use types by region 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

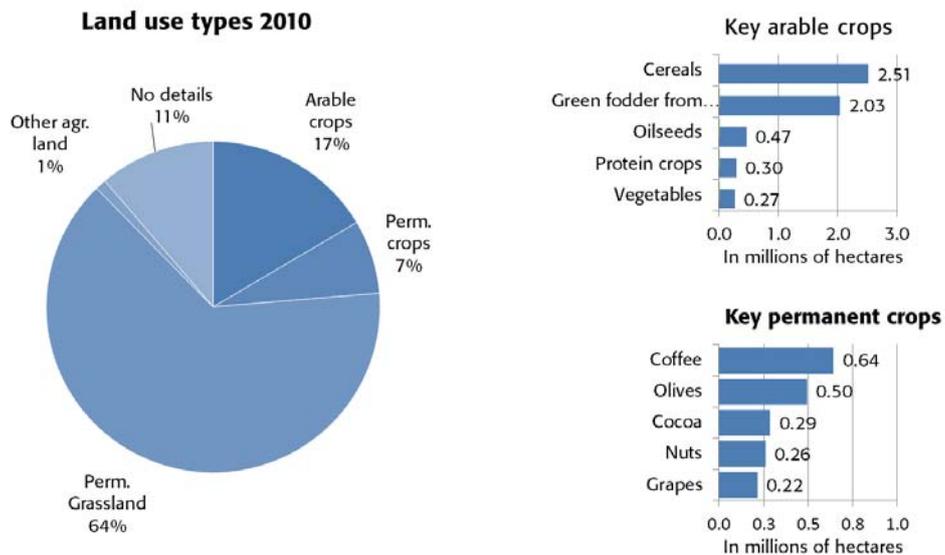


Figure 17: World: Distribution of main land used use types and crop categories 2010.

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

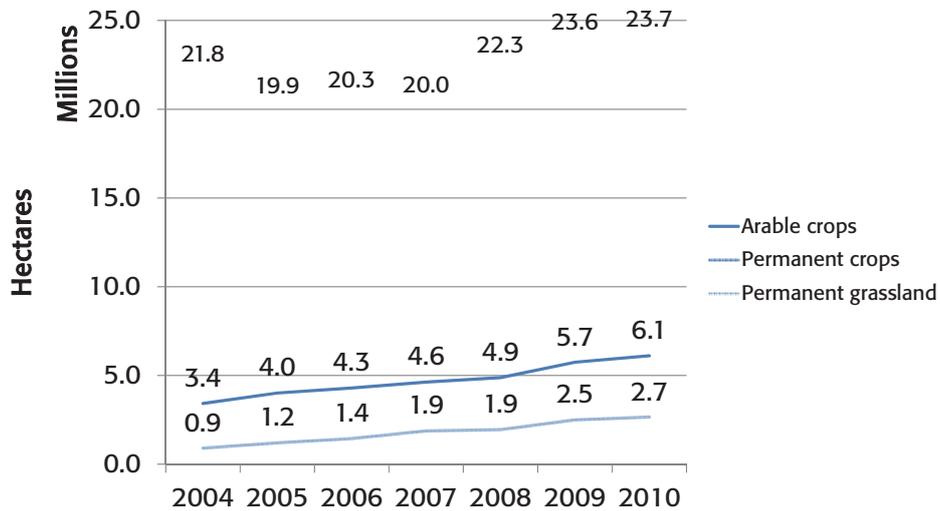


Figure 18: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 15: World: Land use and crop categories in organic agriculture worldwide 2010

Main use	Crop category	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	3'974'799
Arable crops	Arable crops, no details	99'200
	Arable crops, other	76'083
	Cereals	2'512'715
	Flowers and ornamental plants	291
	Green fodder from arable land	2'032'379
	Hops	228
	Industrial crops	28'641
	Medicinal and aromatic plants	87'602
	Mushrooms and truffles	59
	Oilseeds	468'021
	Protein crops	299'575
	Root crops	92'221
	Seeds and seedlings	5'503
	Strawberries	3'347
	Sugarcane	66'101
	Textile crops	62'408
	Tobacco	106
	Vegetables	271'650
Arable crops total		6'106'131
Cropland, no details	Cropland, no details	186'616
Other agricultural land	Fallow land, crop rotation	311'583
	Home gardens	48
	Other agricultural land, no details	39'090
	Unutilized land	46'138
Other agricultural land, total		396'860
Permanent crops	Berries	36'629
	Citrus fruit	60'709
	Cocoa	287'411
	Coconut	100'492
	Coffee	642'883
	Flowers and ornamental plants, permanent	118
	Fruit, no details	1'295
	Fruit, temperate	124'564
	Fruit, tropical and subtropical	189'959
	Fruit/nuts/berries	9'462
	Grapes	217'634
	Medicinal and aromatic plants, permanent	27'167
	Nurseries	1'103
	Nuts	262'520
	Olives	495'480
	Other permanent crops	160'369
	Tea/mate, etc.	41'017
Permanent crops total		2'658'811
Permanent grassland total		23'717'788
Total		37'041'004

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Arable land

With a total of at least 6.1 million hectares, arable land constitutes 17 percent of the organic agricultural land. The organic arable land accounts for 0.44 percent of the world's total arable land.¹ An increase of 6 percent compared with 2009 was reported. There was an increase in almost all crop categories. Almost three quarters of the arable land is located in Europe, followed by North America (18 percent). Asia and Latin America have four percent each of the world's organic arable land.

Most of this category of land is used for cereals including rice (2.5 million hectares), followed by green fodder (2 million hectares) and vegetables (0.22 million hectares).

Table 16: Use of organic arable land (including in-conversion areas), 2009 and 2010 compared

Crop group	2009	2010	Change in ha	Change in %
Arable crops, no details	71'691	99'200	27'510	38
Arable crops, other	78'250	76'083	-2'167	-3
Cereals	2'482'399	2'512'715	30'316	1
Flowers and ornamental plants	324	291	-33	-10
Green fodder from arable land	1'843'257	2'032'379	189'122	10
Hops	216	228	12	5
Industrial crops	23'222	28'641	5'419	23
Medicinal and aromatic plants	81'788	87'602	5'815	7
Mushrooms and truffles	106	59	-47	-44
Oilseeds	452'879	468'021	15'142	3
Protein crops	231'628	299'575	67'947	29
Root crops	76'941	92'221	15'280	20
Seeds and seedlings	293	5'503	5'210	1776
Strawberries	3'060	3'347	288	9
Sugarcane	65'688	66'101	413	1
Textile crops	77'132	62'408	-14'724	-19
Tobacco	197	106	-91	-46
Vegetables	254'327	271'650	17'323	7
Total	5'743'397	6'106'131	362'734	6

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Not all countries included in the survey provided data on land use or crop areas.

Notes:

- › The decrease of flowers and ornamental plants is mainly due to the fact that Eurostat has not reported this category since 2010.
- › The decrease of textile crops is due to the fact that Syria had 24'000 hectares in the past and did not report its land use details for 2010.
- › The increase in seeds is mainly due to Ukraine, from where 5'000 hectares were reported.

¹ 1'381'204'040 hectares in 2009 according to FAOSTAT, FAO, Rome. See the FAO Homepage: faostat.fao.org > Resources > Resourcstat > <http://faostat.fao.org/site/377/default.aspx#ancor>

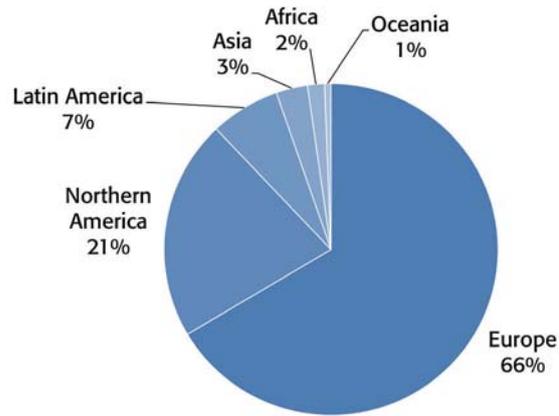


Figure 19: World: Distribution of arable cropland by region 2010

Source: Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

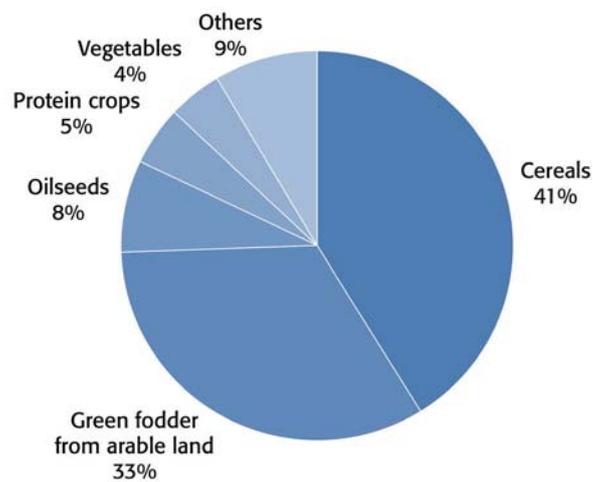


Figure 20: World: Use of arable cropland by crop group 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Permanent crops

Permanent crops account for approximately 2.7 million hectares, which is 1.75 percent of the world's permanent cropland.¹ Compared with the previous survey, more than 150'000 hectares or six percent more were reported. With seven percent, permanent cropland has a higher share in organic agriculture than in total agriculture, where it accounts for approximately three percent. Most of the permanent cropland is in Europe (1 million hectares), followed by Latin America (0.9 million hectares), and Africa (0.5 million hectares) (see Table 14). The most important crops are coffee (with 0.64 million hectares reported, constituting one-fifth of the organic permanent cropland), followed by olives (0.5 million hectares), cocoa (0.29 million hectares), nuts (0.26 million hectares), and grapes (0.22 million hectares).

Table 17: Use of organic permanent cropland (including in-conversion areas), 2009 and 2010 compared

	2009	2010	Change [ha]	Change %
Berries	29'902	36'629	6'727	22.5
Citrus fruit	68'210	60'709	-7'501	-11.0
Cocoa	272'415	287'411	14'996	5.5
Coconut	43'321	100'492	57'171	132.0
Coffee	560'368	642'883	82'515	14.7
Flowers and ornamental plants	75	118	43	57.3
Fruit, no details	7'273	1'295	-5'978	-82.2
Fruit, temperate	92'875	124'564	31'689	34.1
Fruit, tropical and subtropical	174'131	189'959	15'828	9.1
Fruit/nuts/berries	13'756	9'462	-4'294	-31.2
Grapes	190'144	217'634	27'490	14.5
Medicinal & aromatic plants	14'740	27'167	12'427	84.3
Nurseries	1'071	1'103	32	3.0
Nuts	230'480	262'520	32'040	13.9
Olives	491'400	495'480	4'080	0.8
Other permanent crops	254'401	160'369	-94'032	-37.0
Tea/mate, etc.	54'696	41'017	-13'679	-25.0
Total	2'499'259	2'658'811	159'552	6.4

Source: FiBL-IFOAM-Survey 2012, based on data from governments, the private sector, and certifiers. For detailed data sources see annex.
Blank cells: No data available. Not all countries included in the survey provided data on land use or crop areas.

¹ There were 152'149'880 hectares of permanent cropland in 2009 according to FAOSTAT, FAO, Rome. See the FAO Homepage: faostat.fao.org > Resources > Resourcestat > Land at <http://faostat.fao.org/site/377/default.aspx#ancor>

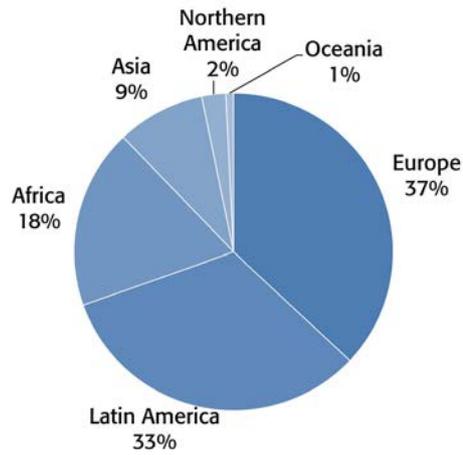


Figure 21: World: Distribution of permanent cropland by region 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

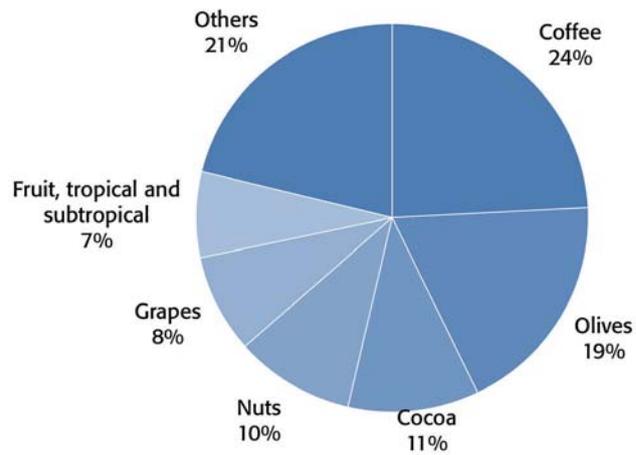


Figure 22: World: Use of permanent cropland by crop group 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Wild collection and beekeeping

The collection of wild harvested crops is defined in the IFOAM Basic Standards, and wild collection activities are regulated in organic laws. A collection area (including beekeeping) of 43 million hectares was reported for 2010, which is an increase of 2 million hectares compared with 2009.

The organic wild collection areas are concentrated in Africa, Asia, Europe and Latin America; the distribution is thus quite different from that of the organic agricultural land. There are some wild collection crops in Canada. For the United States, no such areas were reported.

The countries with the largest areas are Finland (mainly berries), followed by Brazil and Zambia (beekeeping).

Wild berries, medicinal and aromatic plants, as well as shea nuts in Africa and Brazil nuts in Latin America play the most important role. Unfortunately, details on the crops harvested were only available for about one third of the wild collection area.

Table 18: Wild collection and beekeeping areas by region 2010

Region	2009 [ha]	2010 [ha]	Change [ha]	Change in %
Africa	16'366'757	16'364'414	-2'342	0.0
Asia	4'224'787	4'821'377	596'590	14.1
Europe	11'684'388	13'360'526	1'676'137	14.3
Latin America	8'450'853	8'194'649	-256'204	-3.0
Northern America	210'231	210'231	0	0.0
Oceania	50	550	500	1000.0
Total	40'937'066	42'951'747	2'014'681	5

Source: FiBL-IFOAM Survey 2012, based on data from governments, the private sector, and certifiers. For detailed data sources see annex.

Blank cells: No data available.

Table 19: Wild collection and beekeeping areas by crop group 2010

Crop	Hectares
Beekeeping	12'643'396
Berries, wild	7'834'588
Forest honey	71'863
Fruit, wild	1'846'652
Medicinal and aromatic plants, wild	3'512'219
Mushrooms, wild	414'119
Nuts, wild	876'441
Oil plants, wild	445'000
Palm sugar	12'422
Palmito, wild	66'780
Seaweed	200'000
Wild collection, no details	14'900'876

Crop	Hectares
Wild collection, other	127'391
Total	42'951'747

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

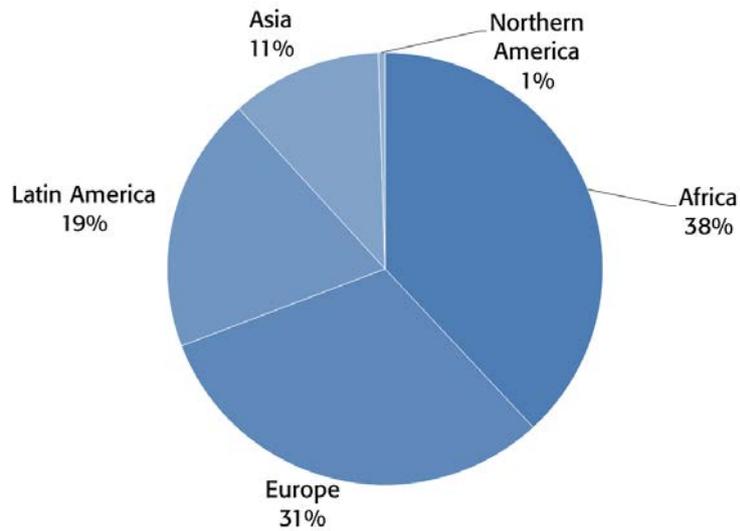


Figure 23: World: Geographical distribution of organic wild collection and beekeeping areas in 2010

Source: FiBL-IFOAM Survey 2012, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex.

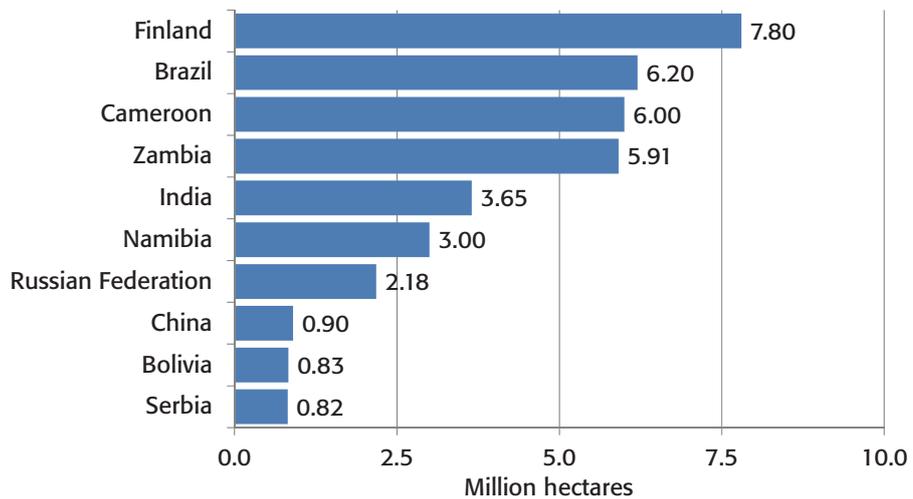


Figure 24: World: The ten countries with the largest organic wild collection and beekeeping areas in 2010

Source: FiBL-IFOAM Survey 2012, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex.

Table 20: Wild collection and beekeeping areas by country 2010

Country	Crop group	2010
Albania	Wild collection, no details	251'717
Algeria	Fruit, wild	1'004
Argentina	Wild collection, no details	3'695
	Beekeeping	721'457
Armenia	Wild collection, no details	500
Azerbaijan	Berries, wild	5
	Fruit, wild	246
	Nuts, wild	148
Bhutan	Medicinal and aromatic plants, wild	15'604
Bolivia	Nuts, wild	611'600
	Wild collection, no details	217'006
Bosnia and Herzegovina	Wild collection, no details	220'000
Brazil	Nuts, wild	18'200
	Wild collection, no details	6'182'180
Burkina Faso	Medicinal and aromatic plants, wild	27
	Fruit, wild	350
	Nuts, wild	55'633
	Wild collection, other	300
Bulgaria	Wild collection, no details	546'194
Cameroon	Beekeeping	6'000'000
Canada	Wild collection, no details	210'231
Chad	Wild collection, other	2'000
Chile	Wild collection, no details	119'087
China	Wild collection, no details	900'000
Colombia	Palmito, wild	6'850
	Beekeeping	5
Comoros	Wild collection, no details	385
Côte d'Ivoire	Medicinal and aromatic plants, wild	500
Croatia	Medicinal and aromatic plants, wild	7'000
Ecuador	Mushrooms, wild	980
	Wild collection, no details	8'700
Ethiopia	Beekeeping	458
Fiji	Wild collection, no details	50
Finland	Wild berries	7'800'224
French Polynesia	Fruit, wild	500
Georgia	Wild collection, no details	853
	Beekeeping	12
Ghana	Nuts, wild	19'551
Guyana	Palmito, wild	59'930
Iceland	Seaweed	200'000
	Wild collection, no details	12'439
India	Wild collection, no details	3'650'000

Indonesia	Medicinal and aromatic plants, wild	7'000
	Forest honey	13'278
	Palm sugar	12'422
Iran (Islamic Republic of)	Medicinal and aromatic plants, wild	38'200
Kazakhstan	Medicinal and aromatic plants, wild	1'300
Kenya	Medicinal and aromatic plants, wild	41'486
	Forest honey	58'417
Lesotho	Oil plants, wild	45'000
Madagascar	Wild collection, no details	44'962
Malawi	Wild collection, no details	4'473
	Wild collection, other	872
Mexico	Medicinal and aromatic plants, wild	60
	Fruit, wild	12'032
	Wild collection, no details	46'208
	Wild collection, other	230
Moldova	Fruit, wild	2'080
Montenegro	Medicinal and aromatic plants, wild	101'800
	Fruit, wild	1
Morocco	Medicinal and aromatic plants, wild	200'200
	Fruit, wild	17'000
	Oil plants, wild	400'000
	Wild collection, no details	1'000
Namibia	Medicinal and aromatic plants, wild	3'000'000
Nepal	Wild collection, no details	24'922
Nicaragua	Beekeeping	11'463
Peru	Wild collection, no details	172'666
Romania	Wild collection, no details	77'294
Russian Federation	Berries, wild	12'333
	Mushrooms, wild	412'000
	Fruit, wild	1'755'707
Rwanda	Wild collection, no details	79
Senegal	Wild collection, no details	432
Serbia	Wild collection, no details	817'128
South Africa	Medicinal and aromatic plants, wild	51'218
Spain	Wild collection, no details	181'757
Sudan	Wild collection, other	122'000
Syrian Arab Republic	Wild collection, no details	8'000
Thailand	Wild collection, no details	701
The former Yugoslav Republic of Macedonia	Wild collection, no details	556'600
Togo	Wild collection, other	650
Tunisia	Wild collection, no details	228'089
Turkey	Berries, wild	22'026
	Medicinal and aromatic plants, wild	47'025
	Mushrooms, wild	1'140

STATISTICS: WILD COLLECTION AND BEEKEEPING

	Fruit, wild	55'638
	Nuts, wild	423
Uganda	Wild collection, no details	158'328
Ukraine	Wild collection, no details	280'000
Uruguay	Wild collection, no details	2'300
Uzbekistan	Medicinal and aromatic plants, wild	199
	Fruit, wild	2'000
	Wild collection, no details	143'000
	Medicinal & aromatic plants, wild	422
Viet Nam	Wild collection, no details	2'565
Zambia	Beekeeping	5'910'000

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Statistics on selected crops

In this section, some of the data received on key crops are presented, including area under organic management and, if available, details on the in-conversion status and comparison with the total area of the crops. FiBL collected land use and crop data for the first time in 2004; hence, the development graphs show the growth since that year.

It should be noted that the **organic areas are compared to the area harvested** in 2009 as provided by FAO. The data may not necessarily be directly comparable to the areas sown or planted as registered by the certification bodies and may, due to hurricanes for instance, not be the same as the area from which crops were harvested.

In some cases, the area data may refer to mixed cropping areas or, in the case of tropical fruit, to agroforestry areas, where the provided crop surfaces are the total surface of the agroforestry system, including shade trees and other crops. This should be borne in mind when comparing the organic crop area to overall area for a certain crop, particularly in the case of tropical crops.

Data on conversion status: For some countries, data were collated from several certifiers, some of which provided information on the conversion status whereas others did not. Therefore, not in all cases is the sum for land under conversion and the fully converted land necessarily the total land under organic agricultural management (=conversion land, fully converted land and land for which no such details were available).

The tables presented here are an example of the information available—also on other crops—in the FiBL database.

Table 21: Selected key crops in organic agriculture 2010 (overview): Land under organic management (including conversion areas)

Main crop category	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]
Cereals	3'208	98'690	1'709'704	122'596	574'611	3'905
Citrus fruit	7'328	182	31'760	15'629	5'692	119
Cocoa	74'195	2'225		210'483		507
Coffee	168'293	64'406		409'515		669
Fruit, temperate	6'370	6'683	94'812	6'909	8'023	1'767
Fruit, tropical and subtropical	17'696	38'016	11'973	118'094	3'595	585
Grapes	1'719	2'897	192'671	7'948	11'577	822
Oilseeds	36'363	32'297	188'248	41'509	169'385	217
Olives	121'631	729	367'463	5'188		470
Protein crops	35	71	229'910	30'131	39'409	18
Vegetables	6'767	11'628	112'894	73'709	65'264	1'388

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

› Cereals

Table 22 shows that at least 2.5 million hectares of cereals are under organic management (including in-conversion areas). Comparing the organic figure with FAO's figure for the world's harvested cereal area of 700 million hectares in 2009 (FAOSTAT)¹, 0.4 percent of the total cereal area is under organic management.

Cereals include wheat, spelt, barley, oats, grain maize, rye, and triticale (see Figure 26).

The key cereal producers worldwide are India (97 million hectares), China (89 million hectares), the United States (58 million hectares), and the Russian Federation (42 million hectares).

Of these four countries, information on the organic cereal area was available only for the United States. Here, almost 370'000 hectares or 0.6 percent of the cereal area were organic (2008). The United States are also the largest organic producer, followed by Canada (2009 data) and Germany (both approximately 207'000 hectares), and Italy (195'000 hectares).

Some countries are reaching shares that are far higher than the global cereal share of 0.4 percent. Figures for some countries are as follows: Austria 11.4 percent, Sweden 7.4 percent, Estonia 6.1 percent, and Lithuania 5.8 percent.

As some of the world's large cereal producers (such as India, China, and the Russian Federation) did not provide land use and crop details, it can be assumed that the cereal area is larger than shown here.

Even though the organic cereal area has increased by more than 50 percent since 2004 (1.6 million hectares), the cereal area did not show a great increase in 2010. This is mainly due to a strong decrease of the cereal area in Italy in that year.

The available data on the conversion status indicate that 25 percent of the organic cereal area were in-conversion in 2010 (half a million hectares). If this is indicative, there could be a considerable increase in supply of organic cereals in the near future.

¹ FAOSTAT › PRODUCTION › PRODUCTION › CROPS. The FAOSTAT homepage at <http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor>. Download of January 15, 2009.

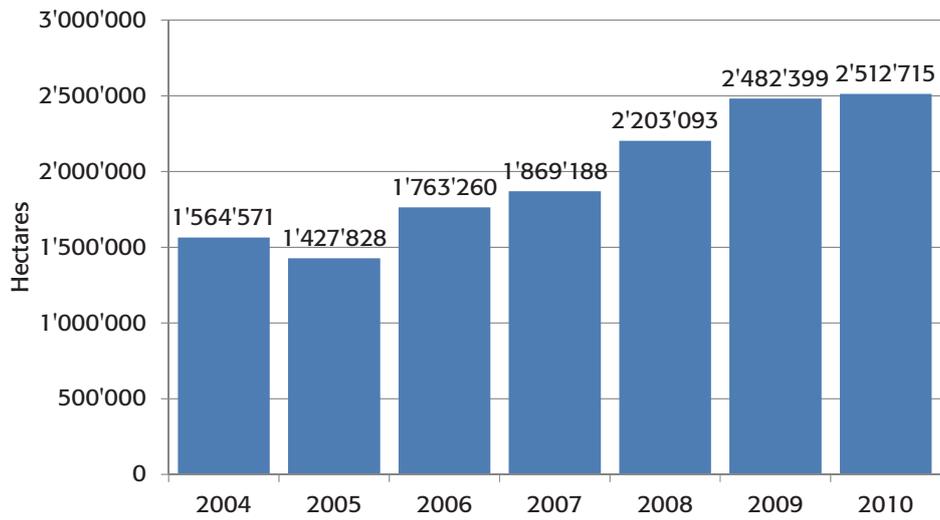


Figure 25: Cereals: Development of the global organic area 2004-2010 (including conversion areas)

Source: FiBL-IFOAM-SOEL 2006-2012

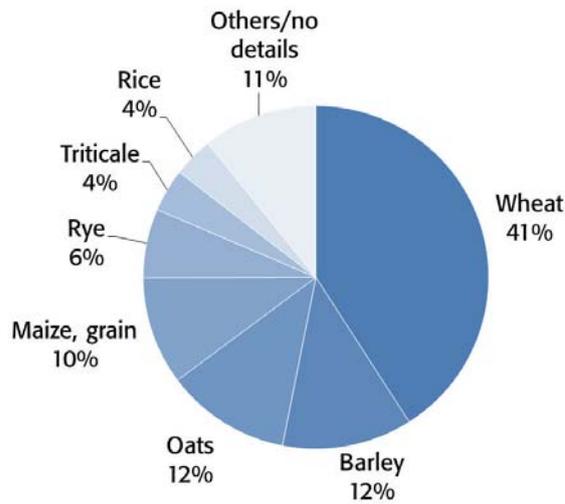


Figure 26: Cereals: Distribution of cereal types 2010

Source: FiBL-IFOAM 2012

Table 22: Organic cereal area 2010

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	1	0.0%		1
Argentina	27'370	0.3%		
Australia	3'905	0.0%		
Austria	95'569	11.4%		
Azerbaijan	1'932	0.2%	405	1'527
Bangla Desh	90	.	90	
Belgium	4'320	1.3%	2'721	1'599
Belize	1	0.0%	1	
Bolivia	19'838	2.2%	9'932	9'906
Bosnia and Herzegovina	246	0.1%		
Brazil	61'200	0.3%		
Bulgaria	5'338	0.3%	1'429	3'909
Burkina Faso	105	0.0%	105	
Cambodia	1'025	0.0%	324	702
Canada	207'191	1.4%	207'191	
Chile	287	0.1%	287	
Colombia	2	0.0%	2	
Costa Rica	55	0.1%		
Croatia	7'541	1.3%	1'789	5'752
Cyprus	476	1.1%	319	157
Czech Republic	24'485	1.6%	13'998	10'487
Denmark	43'718	2.9%	29'893	13'825
Ecuador	2'434	0.3%	1'981	452
Estonia	19'271	6.1%	11'152	8'119
Ethiopia	300	0.0%		300
Finland	31'337	2.8%	31'337	
France	125'899	1.3%	79'232	46'667
Georgia	29	0.0%		
Germany	207'000	3.0%		
Greece	35'190	3.0%	32'809	2'381
Hungary	22'249	0.8%	17'909	4'340
Indonesia	2'971	0.0%	2'923	48
Iran (Islamic Republic of)	1'166	0.0%	1'160	6
Ireland	1'192	0.4%	889	303
Italy	194'974	5.6%	148'344	46'630
Japan	2'981	0.2%	2'981	
Kazakhstan	47'496	0.3%		
Kyrgyzstan	1'158	0.2%	333	825
Lao People's Democratic Republic	962	0.1%	269	693
Latvia	26'699	4.9%	23'159	3'540

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Liechtenstein	35	.	35	
Lithuania	64'510	5.8%	48'221	16'289
Luxembourg	633	2.1%	586	48
Malawi	192	0.0%	29	163
Mali	158	0.0%	158	
Mexico	5'214	0.1%	5'214	
Moldova	13'055	.	2'833	10'222
Montenegro	47	1.0%		47
Netherlands	4'395	2.0%	4'152	243
Norway	8'626	2.8%	6'695	1'931
Pakistan	5'911	0.0%		
Peru	3'396	0.3%	2'345	1'051
Philippines	554	0.0%	508	
Poland	102'274	1.2%	50'137	52'137
Republic of Korea	9'177	0.9%		
Romania	72'300	1.4%	32'561	39'739
Senegal	203	0.0%	203	
Serbia	568	0.0%	87	481
Slovakia	19'216	2.5%	11'476	7'740
Slovenia	1'250	1.2%	871	379
South Africa	275	0.0%	246	29
Spain	166'082	2.7%	85'673	80'409
Sudan	491	0.0%	491	
Sweden	76'468	7.4%	61'104	15'364
Switzerland	5'973	3.9%		
Taiwan	1'085	.		
Thailand	22'133	0.2%		
The former Yugoslav Republic of Macedonia	2'999	1.7%	276	2'724
Tunisia	1'484	0.1%		
Turkey	134'885	1.1%	10'829	124'056
Ukraine	133'465	0.9%	133'465	
United Kingdom	57'418	1.8%	55'158	2'260
United States of America	367'420	0.6%	367'420	
Uruguay	2'800	0.3%	2'800	
Viet Nam	20	0.0%		
Total Organic cereal area	2'512'715	0.4%	1'506'867	517'646

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

> Citrus fruit

In Table 23, the area of organic citrus fruits is shown, which includes oranges, lemons, limes, grapefruit, pomeloes, and “other citrus”. According to these data, 60'000 hectares of citrus fruit are grown organically (including conversion areas) worldwide. This constitutes 0.7 percent of the world's citrus area of 8.9 million hectares in 2009 (FAOSTAT).¹

As no crop details for the organic area were available for some of the world's leading citrus producers—China (2 million hectares), India (0.9 million hectares, Brazil (0.9 million hectares², and Nigeria (0.75 million hectares)—it can be assumed that the world figures for the area under organic citrus is higher.

In organic agriculture, the largest producer is Italy (23'000 hectares, 13.5 percent of Italy's harvested citrus fruit area), followed by Mexico (6'000 hectares, 1.1 percent), and Ghana (5'700 hectares, 8.1 percent).

Italy has the highest share of organic citrus fruit. It is followed by France (10.6 percent), and Burkina Faso (9.5 percent).

Since 2004, when 28'500 hectares of organic citrus were grown, the area has doubled.

Crop details were available for about one third of the organic citrus fruit area: Oranges have 56 percent of the citrus area, followed by lemons and limes with 12 percent (see Figure 27). The available data on the conversion status indicate that 25 percent of the organic citrus area was in-conversion in 2010 (10'000 hectares). If this is indicative, there could be a considerable increase in supply of organic citrus fruit in the near future.

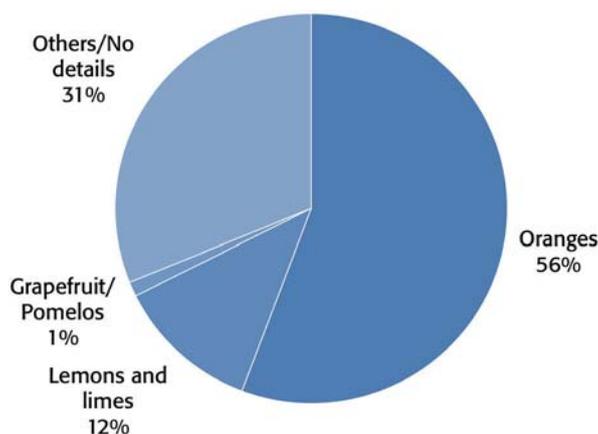


Figure 27: Citrus fruit: Use of organic citrus fruit area 2010

Source: FiBL-IFOAM 2012

¹ FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at <http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor>. Update of July 21, 2011.

²The figure for Brazil is a FiBL estimate.

Table 23: Organic citrus fruit 2010

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	642	0.5%		
Australia	119	0.5%		
Azerbaijan	5	0.2%	2	3
Benin	2	0.0%		
Brazil	3'400	0.4%		
Burkina Faso	21	9.5%	21	
Cameroon	1	.	1	
Costa Rica	546	1.9%		
Cuba	4'195	8.7%		
Cyprus	57	1.8%	21	36
Dominican Republic	263	2.0%	251	12
Ecuador	5	0.0%	4	1
El Salvador	9	0.1%	9	
France	194	10.6%	114	80
Georgia	4	0.0%		
Ghana	5'720	8.1%	5'200	521
Greece	1'909	3.3%	1'642	267
Indonesia	20	0.0%	20	
Iran (Islamic Republic of)	30	0.0%	30	
Israel	117	0.7%	117	
Italy	23'424	13.5%	15'852	7'572
Jordan	6	0.1%	5	1
Malta	1	0.6%		1
Mexico	6'024	1.1%	6'024	
Morocco	400	0.4%		
Mozambique	17	0.2%		
Paraguay	60	0.5%	60	
Peru	75	0.1%	56	19
Senegal	2	0.0%		
South Africa	1'165	1.7%	974	181
Spain	5'392	1.7%	3'562	1'830
Turkey	783	0.8%	422	361
United States of America	5'692	1.7%	5'692	
Uruguay	410	3.1%	410	
Total	60'709	0.7%	40'489	10'884

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

› Cocoa beans

Almost 290'000 hectares of cocoa were grown organically (including in-conversion areas) in 2010. This constitutes 3.3 of the world's harvested cocoa bean area of 8.4 million hectares 2009 (FAOSTAT).

The world's leading producers are Côte d'Ivoire (2 million hectares), Ghana (1.7 million hectares), Nigeria (1.4 million hectares), and Indonesia (1 million hectares). With the exception of Nigeria, data on the organic cocoa area were available for all these countries.

The largest organic cocoa areas are in the Dominican Republic (115'000 hectares), Sierra Leone (almost 49'000 hectares), Ecuador (34'000 hectares), and Peru (28'000 hectares).

Some countries have, when compared with the FAO data on harvested crops, very high shares. This must probably be attributed to the fact that some of the cocoa bean areas are managed extensively.

The organic cocoa bean area has grown more than fivefold since 2004 (approximately 50'000 hectares) and thus faster than most other crops/crop groups. However, some of the increase must be attributed to continually improving data availability.

The available data on the conversion status indicate that 10 percent of the organic cocoa area was in conversion in 2010 (28'000 hectares). If this is indicative, a slight increase in supply of organic cocoa in the near future may be expected.

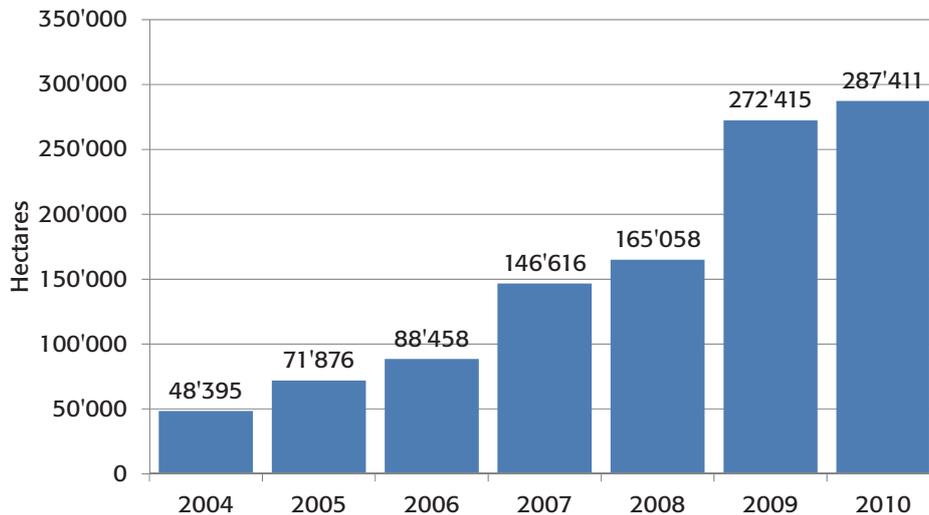


Figure 28: Cocoa beans: Development of the organic area 2004-2010

Source: FiBL, IFOAM, SOEL 2006-2012

Table 24: Organic cocoa bean area 2010

Country	Area organic [ha]	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Bolivia	5'260		4'882	378
Brazil	9'000	1.4%		
Cameroon	15	0.0%	15	
Colombia	164	0.1%	164	
Costa Rica	166	3.7%		
Côte d'Ivoire	57	0.0%	57	
Dominican Republic	115'432	66.7%	110'989	4'443
Ecuador	33'695	8.5%	27'825	5'870
Ghana	4'449	0.3%		
Grenada	65	9.5%		
Indonesia	2'225	0.2%	1'892	334
Mexico	14'796	24.1%	14'796	
Nicaragua	3'666		1'521	2'146
Nigeria	11'979	0.9%	4'754	7'224
Peru	28'239	41.0%	20'280	7'959
Sao Tome and Principe	4'118	21.7%	4'118	
Sierra Leone	48'939			
Togo	719	0.5%	719	
United Republic of Tanzania	3'919		3'919	
Vanuatu	507	20.3%	507	
Total	287'411	3.3%	196'439	28'353

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

For some of the countries in this table, the cocoa share was very high and not plausible; the corresponding figures were, therefore, eliminated. The high organic share compared with the total area harvested according to FAO, is probably due to the fact that cocoa is grown more extensively in organic agriculture.
Also for the other countries listed in this table, it should be borne in mind that the organic data are perhaps not directly comparable to the overall cocoa area.

› **Coffee**

Over 600'000 hectares of coffee were grown organically in 2010 (including in-conversion areas). This constitutes 6.5 percent of the world's harvested coffee area of 9.8 million hectares in 2009 according to FAOSTAT.

The world's leading producers are Brazil (2 million hectares), Indonesia (almost 1 million hectares), Mexico (0.8 million hectares), Colombia (0.8 million hectares), and Vietnam (0.5 million hectares), for all of which data on the organic production were available.¹

In organic farming, the largest areas are in Mexico (185'000 hectares), Peru (136'000 hectares), and Ethiopia (125'000 hectares). These countries are also reaching high shares (Peru: 39 percent, Ethiopia: 31 percent, Mexico: 23 percent). Some of these high percentages must be attributed to the fact the coffee is grown more extensively in organic agriculture and often in association with other crops.

The organic coffee area has more than trebled since 2004.

The available data on the conversion status indicate that one sixth of the organic coffee area was in conversion in 2010 (70'000 hectares). If this is indicative, a slight increase in supply of organic coffee could be expected in the near future.

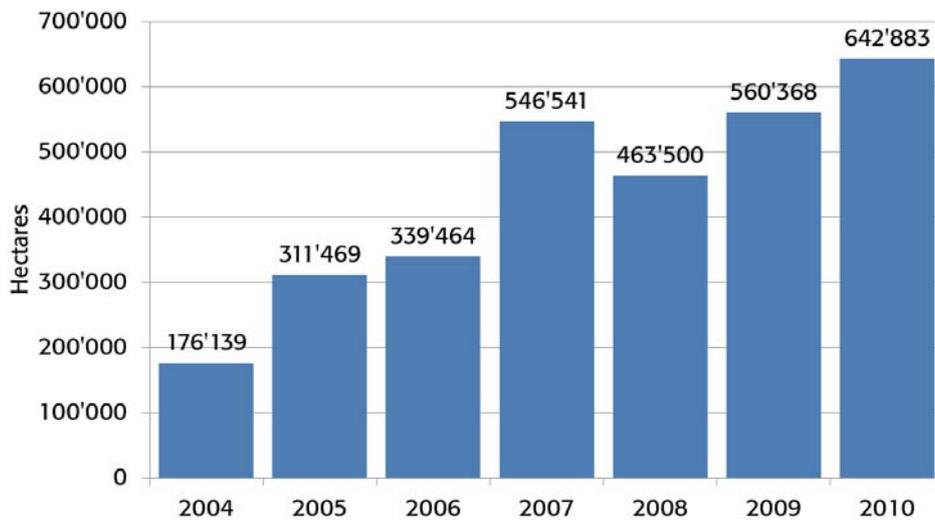


Figure 29: Coffee: Development of organic area 2004-2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

¹The figure for Brazil is a FiBL estimate.

Table 25: Organic coffee area 2010

Country	Area organic	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Bolivia	9'673	36.7%	8'332	1'341
Brazil	15'000	0.7%		
Colombia	9'106	1.2%	9'106	
Costa Rica	997	1.0%		
Côte d'Ivoire	814	0.2%	814	
Cuba	3'807	14.3%		
Dominican Republic	17'162	13.2%	11'962	5'200
Ecuador	7'776	4.5%	4'821	2'955
El Salvador	3'639	2.4%	3'617	22
Ethiopia	124'578	31.5%	124'578	
Guatemala	8'179	3.3%	6'879	1'300
Haiti	102	0.1%	102	
Indonesia	34'533	3.5%	34'216	317
Jamaica	7	0.1%		
Kenya	240	0.2%	120	120
Lao People's Democratic Republic	3'254	6.2%	684	485
Mexico	185'193	23.5%	185'193	
Nepal	1'694	-		
Nicaragua	12'257	10.3%	10'433	1'824
Panama	194	0.6%		
Papua New Guinea	659	1.2%		
Peru	136'424	39.8%	99'841	36'583
Sao Tome and Principe	244	-	244	
Sierra Leone	16'313	-		
Thailand	175	0.3%		
Timor-Leste	24'750	37.5%		
United Republic of Tanzania	26'104	17.4%	6'333	19'771
Vanuatu	10	40.0%		10
Total	642'883	6.5%	507'274	69'928

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

For some of the countries in this table, the coffee share was very high and not plausible; the corresponding figures were, therefore, eliminated. The high organic share compared with the total area harvested according to FAO, is probably because some of the coffee is grown more extensively in organic agriculture.

Also for the other countries listed in this table, it should be borne in mind that the organic data are perhaps not directly comparable to the overall coffee area.

› Fruit: Temperate Fruit

The total area under organic temperate fruit recorded here (125'000 hectares), is one percent of the total area of temperate fruit grown in the world (11.9 million hectares in 2009 according to FAOSTAT).

Of the six most important temperate growers in the world (China, Russia, Iran, India, Turkey, and Serbia) only three (Iran, Turkey, and Serbia), provided data on area under organic temperate grown in 2010. It may, therefore, be assumed that the organic temperate fruit area is higher.

The countries with the largest temperate fruit areas are Italy, Poland, Turkey, and the United States, all of them have more than 10'000 hectares. The highest shares are in the Czech Republic, Austria, Slovenia, and Denmark (see Table 27).

Since 2004, when data on land use and crops were collected for the first time (almost 60'000 hectares), the temperate fruit area has doubled. However, some of the increase must be attributed to continually improving availability of crop data.

The key temperate fruits are apples (with more than a third of the temperate fruit area, and 25 percent of the apple area in Poland), followed by apricots, plums, and pears (Table 26).

The available data on the conversion status indicate a relatively large part of the total temperate fruit (50 percent) to be in-conversion. If this is indicative, there could be a considerable increase in supply of organic temperate fruit in the near future.

Table 26: Organic temperate fruit by crop 2010

Crop	Area [ha]
Apples	53'544
Apricots	9'260
Cherries	7'639
Fruit, temperate, no details	18'727
Fruit, temperate, other	11'823
Peaches and nectarines	6'219
Pears	7'675
Plums	7'750
Pome fruit, no details	1'397
Quinces	15
Stone fruit, no details	513
Total	124'564

Source: FiBL-IFOAM 2012

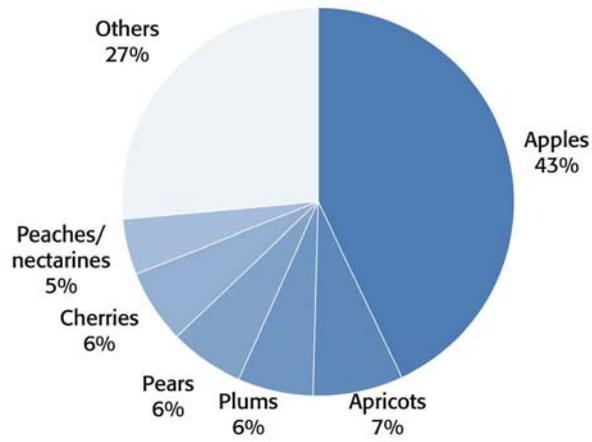


Figure 30: Temperate fruit: Distribution by crop 2010

Source: FiBL-IFOAM 2012

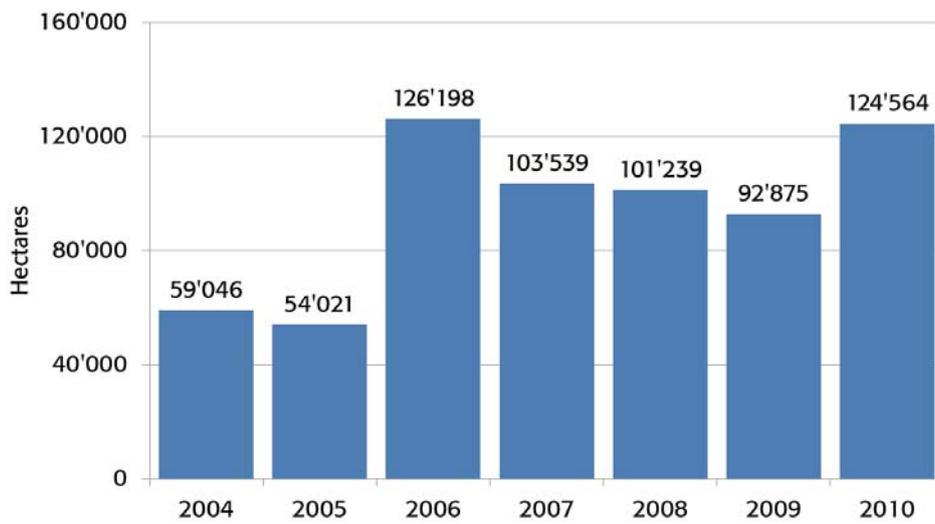


Figure 31: Temperate fruit: Development 2004-2010

Source: FiBL, IFOAM and SOEL 2006-2012

Table 27: Organic temperate fruit 2010

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	14	0.1%	5	9
Argentina	4'455	3.8%		
Australia	793	1.3%		
Austria	2'086	19.3%		
Azerbaijan	423	1.0%	261	333
Belgium	547	3.2%	383	164
Bulgaria	1'186	2.3%	375	811
Canada	890	3.8%	890	
Chile	1'620	1.7%	1'553	
China (2005)	4'000	0.1%		
Croatia	829	2.2%	113	716
Cyprus	75	2.4%	34	42
Czech Republic	4'308	25.2%	1'589	2'719
Denmark	379	11.9%	310	69
Estonia	415	8.1%	311	104
Finland	61	8.8%	61	
France	6'878	5.7%	3'658	3'220
Georgia	354	1.1%		
Germany	3'650	7.6%		
Greece	1'318	1.8%	857	461
Hungary	1'963	2.6%	1'212	751
Iran (Islamic Republic of)	128	0.0%	43	85
Italy	21'990	8.6%	16'088	5'902
Jordan	1	0.0%		1
Kyrgyzstan	97	0.2%		97
Latvia	508	10.7%	432	77
Lithuania	1'332	8.7%	1'082	250
Malta	2	1.2%	1	1
Mexico (2008)	65	0.1%	65	
Moldova (2009)	4'130	.	2'631	1'499
Montenegro	37	0.7%	3	34
Netherlands	646	3.6%	626	20
New Zealand (2009)	974	7.8%		
Norway	168	6.5%	125	43
Oman	4	.		
Peru	768	4.6%	692	76
Poland	17'547	6.7%	6'776	10'771
Portugal	1'778	3.5%		
Republic of Korea	1'676	2.5%		
Romania	1'888	1.3%	525	1'363
Serbia	2'569	0.8%	2'548	21

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Slovakia	769	7.0%	468	301
Slovenia	729	12.1%	610	119
South Africa	513	1.0%	193	162
Spain	3'420	1.8%	2'527	893
Sweden	170	8.7%	131	39
Switzerland	483	7.4%		
The former Yugoslav Republic of Macedonia	334	1.3%	168	166
Tunisia	5'857	9.1%		
Turkey	10'426	3.0%	6'968	3'458
Ukraine	390	+	390	
United Kingdom	1'787	9.5%	1'620	167
United States of America	7'133	2.3%	7'133	
Total	124'564	1%	63'535	34'951

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

› Fruit: Tropical and subtropical fruit

The total area under organic tropical and subtropical fruit recorded here (190'000 hectares) is 0.8 percent of the total area of tropical and subtropical fruit grown in the world (23 million hectares in 2009 according to FAOSTAT data).

Of the five most important tropical and subtropical fruit growers in the world (India, China, Uganda, Brazil, and the Philippines, all with more than one million hectares), only the Philippines provided data on area under organic tropical and subtropical fruit grown in 2010. For Brazil, a FiBL estimate is available.

The largest growers for which data on the organic area were available (Mexico, Philippines, Dominican Republic, Brazil, and Turkey), have all more than 10'000 hectares. Mexico, the Dominican Republic, and Turkey have also very high shares with more than ten percent of their country's total. In the case of the Dominican Republic, this is mainly due to a high share of bananas, in the case of Mexico for mangoes and avocados. The largest proportion of organic tropical and subtropical fruit area are in French Polynesia (54 percent), Burkina Faso (31.5 percent, mainly mangos), followed by the Dominican Republic (20 percent, mainly bananas). By area, the key tropical and subtropical fruits are bananas, avocados, and mangoes (Figure 30).

Since 2004, when data on land use and crops were collected for the first time, the tropical fruit area has more than quadrupled (Figure 33). However, some of the increase must be attributed to the continually improving data availability.

The available data on the conversion status indicate less than ten percent of the total tropical and subtropical fruit area to be in-conversion. If this is indicative, a slight increase in supply in the near future may be expected.

Table 28: Organic tropical and subtropical fruit 2010

Crop	Area [ha]
Avocados	34'873
Bananas	85'940
Camu camu	140
Carobs	861
Cashew apples	907
Dates	3'279
Figs	8'819
Fruit, tropical and subtropical, no details	16'000
Fruit, tropical and subtropical, other	4'376
Guava	64
Kiwis	477
Litchi	87
Mangos	26'154
Noni	444
Papayas	3'505
Passion fruit	136
Persimmons	136
Pineapples	3'084
Pomegranate	678
Total	189'959

Source: FiBL-IFOAM 2012

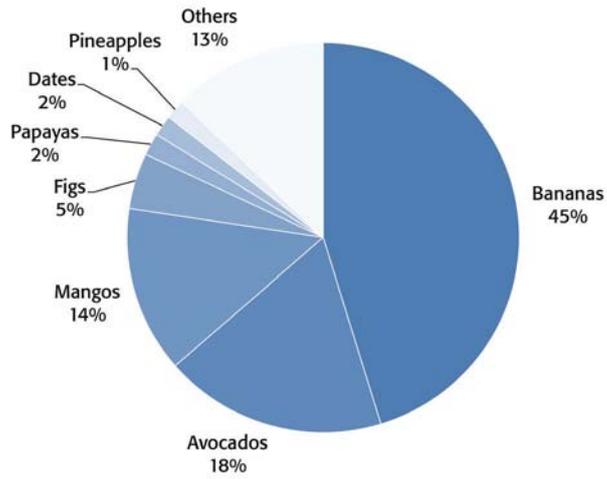


Figure 32: Tropical and subtropical fruit: Distribution by crop 2010

Source: FiBL-IFOAM 2012

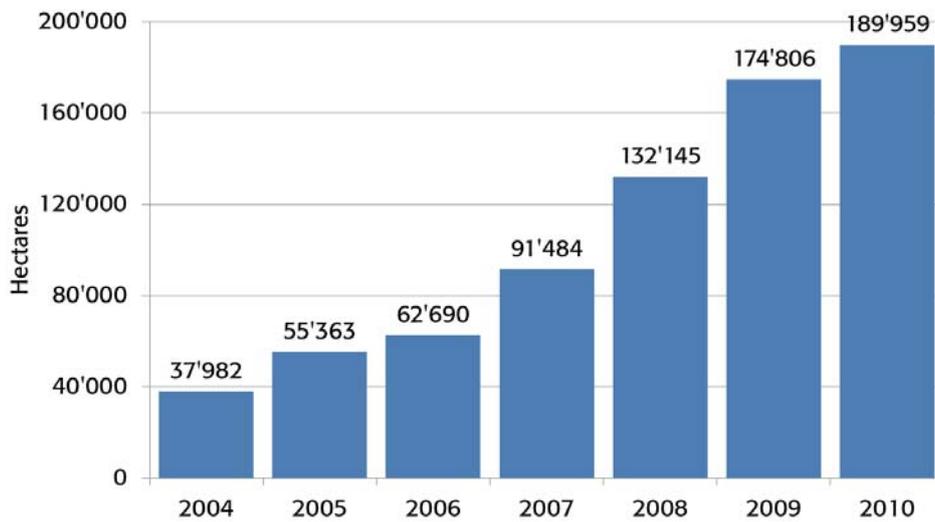


Figure 33: Tropical and subtropical fruit: Development 2004-2010

Source: FiBL, IFOAM, and SOEL 2006-2012

Table 29: Organic tropical and subtropical fruit

Country	Area organic	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Argentina	29	0.3%		
Australia	228	0.6%		
Azerbaijan	249	2.9%	65	184
Benin	66	0.6%		
Bolivia	86	0.1%	86	
Brazil	12'300	0.9%		
Burkina Faso	4'770	31.5%	3'315	
Cambodia	108	0.4%		108
Cameroon	203	0.1%	202	
Chile	1'283	2.9%	1'283	
Colombia	8'106	1.5%	8'106	
Cook Islands	18	15.3%	18	
Costa Rica	8'671	8.4%		
Côte d'Ivoire	448	0.1%	229	219
Croatia	8	0.5%	3	5
Cuba	60	0.0%		
Cyprus	693	25.5%	41	49
Dominican Republic	22'856	20.0%	19'583	3'273
Ecuador	8'864	2.5%	8'456	407
El Salvador	1'164	3.8%	1'164	
Ethiopia	580	0.8%		580
French Guiana (France)	30	2.4%	30	
French Polynesia	340	54.3%	491	150
Georgia	30	.		
Ghana	1'065	0.3%	45	129
Grenada	19	1.6%		
Haiti	33	0.0%		33
Indonesia	35	0.0%	35	
Iran (Islamic Republic of)	1'883	0.9%	1'618	265
Israel	1'274	5.5%	1'274	
Jamaica	2	0.0%		
Jordan	441	11.6%	440	1
Kenya	1'420	0.8%	1'420	
Madagascar	84	0.0%		
Mali	765	1.4%	765	
Martinique (France)	25	0.4%	1	24
Mexico	46'670	10.7%	46'670	
Montenegro	1	0.1%		1
Mozambique	2'171	7.2%		
Pakistan	919	0.3%		
Panama	20	0.1%		

Country	Area organic	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Peru	7'875	3.5%	6'243	1'632
Philippines	31'285	2.9%	5'857	
Réunion (France)	57	1.0%	43	14
Senegal	1'058	5.5%	436	
South Africa	2'891	6.7%	2'624	267
Sri Lanka	66	0.1%		
Sudan	55	0.1%	55	
Taiwan	291	.		
Thailand	1'080	0.2%		
Togo	493	22.6%	456	18
Tunisia	1'025	1.4%		
Turkey	11'270	10.3%	6'676	4'594
United Arab Emirates	356	0.2%		
United Republic of Tanzania	545	0.1%	545	
United States of America	3'595	8.6%	3'595	
Total	189'959	0.8%	121'886	11'953

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: No data available.

› **Grapes**

At least 218'000 hectares of organic grapes are grown, constituting 2.9 percent of the world's grape area (7.6 million hectares in 2009 according to FAOSTAT). In Europe (approximately 190'000 hectares), 4.4 percent of the harvested grape area is organic.

Not all of the grape area listed in the table is used for wine making. The production of table grapes and of raisins is important in many countries, for example, Turkey.

Of the five most important grape growers in the world (Spain, Italy, France, China, and Turkey) only China did not provide data on the area under organic grapes in 2010, even though an older figure is available for that country.

The countries with the largest organic grape areas are, like for the total grape area, Spain, Italy, and France. All of them have more than 50'000 hectares of organic grapes. The highest shares are also in these countries and in Austria (see Table 30).

Since 2004, when data on land use and crops were collected for the first time, the grape area has more than doubled. However, some of the increase must be attributed to continually improving availability of crop data.

The available data indicate a large part of the total grape area (50 percent) to be in-conversion. If this is indicative, a considerable increase in supply of organic grapes may be expected, particularly from France, Italy, and Spain.

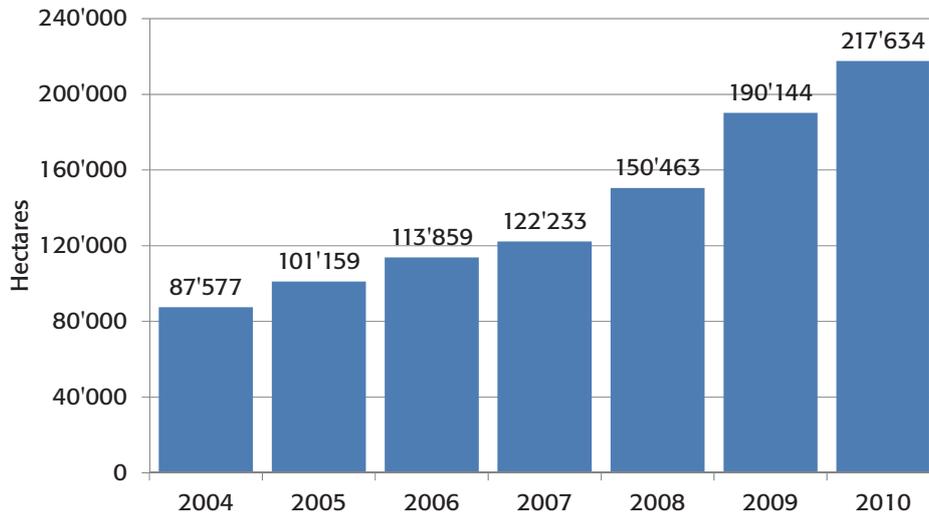


Figure 34: Organic grape area: Development 2004-2010

Source: FiBL, IFOAM, and SOEL 2006-2012

Table 30: Organic grape area 2010

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	25	0.3%	5	20
Andorra	2	.		
Argentina	4'048	1.8%		
Australia	282	0.2%		
Austria	3'863	8.6%		
Azerbaijan	34	0.3%	1	33
Bulgaria	1'285	1.3%	460	825
Canada	129	1.2%	129	
Chile	3'859	2.0%	3'859	
China (2005)	2'000	0.3%		
Croatia	400	1.2%	183	218
Cyprus	204	1.6%	107	96
Czech Republic	770	4.8%	201	569
France	50'268	6.3%	21'403	28'865
Georgia	129	0.3%		
Germany	5'200	5.2%		
Greece	5'001	4.0%	3'874	1'127
Hungary	1'314	1.7%	533	781
Indonesia	5	.	5	
Iran	700	0.2%	500	200
Italy	52'273	6.5%	30'342	21'931
Jordan	1	0.0%		1
Kazakhstan	20	0.2%		
Kyrgyzstan	8	0.1%		8
Luxembourg	22	1.6%	10	12
Malta	2	0.1%	1	1
Moldova	3'489	.	1'155	2'334
Montenegro	5	0.1%		5
Netherlands	40	83.3%		40
New Zealand	540	1.6%		
Poland	96	.	84	12
Portugal	2'667	1.2%		
Romania	894	0.5%	604	290
Slovakia	52	0.6%	50	2
Slovenia	297	1.8%	150	147
South Africa	1'719	1.3%	303	51
Spain	57'231	5.2%	17'665	39'566
Switzerland	379	2.6%		
Macedonia, FYROM	244	1.2%	21	224
Turkey	6'453	1.3%	4'112	2'341
Ukraine	84	0.1%	84	
United Kingdom	110	17.0%	93	17
United States of America	11'448	3.0%	11'448	
Uruguay	40	0.2%	40	
Total	217'634	2.9%	97'619	99'786

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.
Blank cells: Not data

› **Olives**

Almost 500'000 hectares were reported to be in organic olive production in 2010. This is approximately 5.4 percent of the world's total harvested olive area (9.2 million hectares).

The main countries in which olives are grown are the countries around the Mediterranean. Spain is by far the largest grower with 2.5 million hectares, and Tunisia (1.5 million hectares), Italy (1.2 million hectares), and Turkey (0.8 million hectares) are also important producers. For all these countries, data for the organic area are available. Italy has the largest area under organic olives (140'000 hectares), followed by Spain (almost 130'000 hectares), and Tunisia (almost 120'000 hectares).

In Italy, the percentage of area under organic production is relatively high (12 percent). In Spain, 5 percent of the olive area is organic and in Tunisia 8 percent.

Since 2004, when data on land use and crops were collected for the first time, the olive area increased by 50 percent. However, some of the increase must be attributed to continually improving availability of crop data.

The data available for a breakdown of the fully converted and in-conversion area covered approximately two-thirds of the total area under organic olives. If the relative figures are indicative of the proportions of the total area, almost one third is in-conversion, and will be fully converted in the next few years. This has implications for the availability of organic olives in the near future.

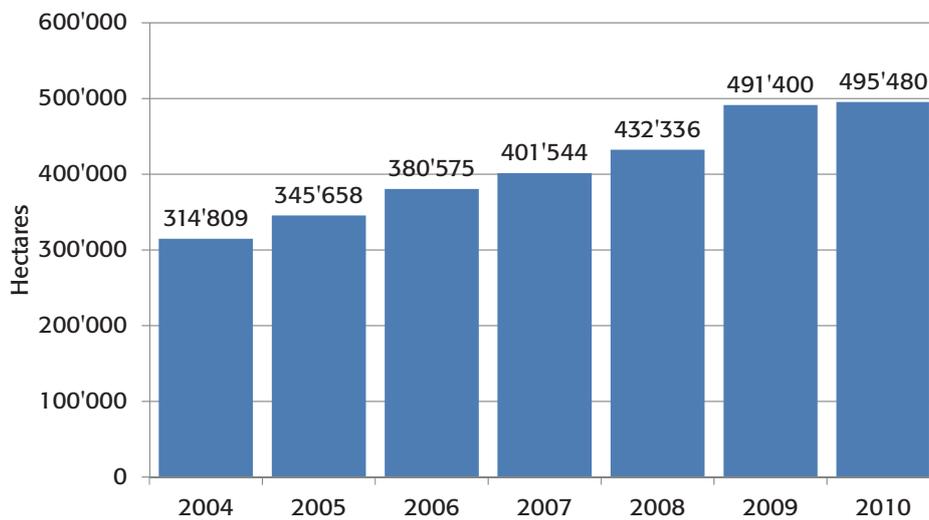


Figure 35: Organic olive area: Development 2004-2010

Source: FiBL-IFOAM-Survey 2012, based on national data sources and certifier data. For detailed data sources see annex.

Table 31: Organic olive area 2010

Country	Area organic [ha]	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Albania	63	0.2%	2	61
Algeria	418	0.1%	418	
Argentina	3'433	6.5%		
Australia	470	4.3%		
Azerbaijan	10	0.5%	5	5
Chile	1'235	10.3%	1'235	
Croatia	322	2.1%	84	238
Cyprus	946	7.9%	641	304
France	2'874	15.1%	946	1'928
Greece	56'970	8.8%	50'025	6'945
Iran	120	0.4%	120	
Italy	140'748	11.8%	96'576	44'172
Jordan	599	1.0%	574	25
Malta	2	33.3%	2	
Montenegro	4	0.2%		4
Morocco	1'800	0.3%		
Peru	94	0.8%	89	6
Portugal	17'209	4.5%		
Slovenia	77	9.2%	32	45
South Africa	29	.	24	4
Spain	126'328	5.1%	84'219	42'109
Tunisia	119'384	8.0%		
Turkey	21'920	3.0%	8'510	13'410
Uruguay	425	18.2%	425	
Total	495'480	5.4%	244'177	109'290

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307. Blank cells: No data.

› Oilseeds

An area of almost 500'000 hectares was reported to be for organic oilseeds in 2010. This is approximately 0.2 percent of the world's total harvested oilseed area (more than 190 million hectares).

The main countries in which oilseeds are grown are the United States, India, China, and Brazil (all with more than 20 million hectares). The United States (32 million hectares) is by far the largest grower. However, of these countries, only for the United States were data on the organic area available, for Brazil there is only an estimate. The countries with the largest organic oilseed area are the United States, Romania, Canada, and Ukraine.

The highest shares are in Belize (peanuts and soybeans), El Salvador (sesame), Peru (soybeans and peanuts), and Austria (soybeans and pumpkin seeds).

Since 2004, when data on land use and crops were collected for the first time, the oilseed area (2004: 140'000 hectares) has more than trebled. However, some of the increase must be attributed to continually improving availability of crop data.

One quarter of the organic oilseed area is for soybeans, and another quarter is for sunflower seeds (Figure 37).

The data available for a breakdown of the total fully converted and in-conversion area covered approximately two-thirds of the organic oilseed area. If the relative figures are indicative of the proportions of the total area, 20 percent is in-conversion, and will be fully converted in the next few years. This has implications for the availability of organic oilseeds in the near future.

Table 32: Organic oilseeds 2010

Crop	Organic area [ha]	Share of total area
Jojoba	540	.
Linseed	58'885	2.8%
Mustard	8	.
Oilseeds, no details	3'689	0.4%
Oilseeds, other	39'570	2.4%
Peanuts	11'636	0.0%
Pumpkin seeds	4'236	.
Rape and turnip rape	80'611	0.3%
Sacha inchi	295	.
Safflower	118	0.0%
Sesame	38'283	0.5%
Soy	123'504	0.1%
Sunflower seed	106'648	0.4%
Total	468'021	0.2%

Source: FiBL-IFOAM 2012

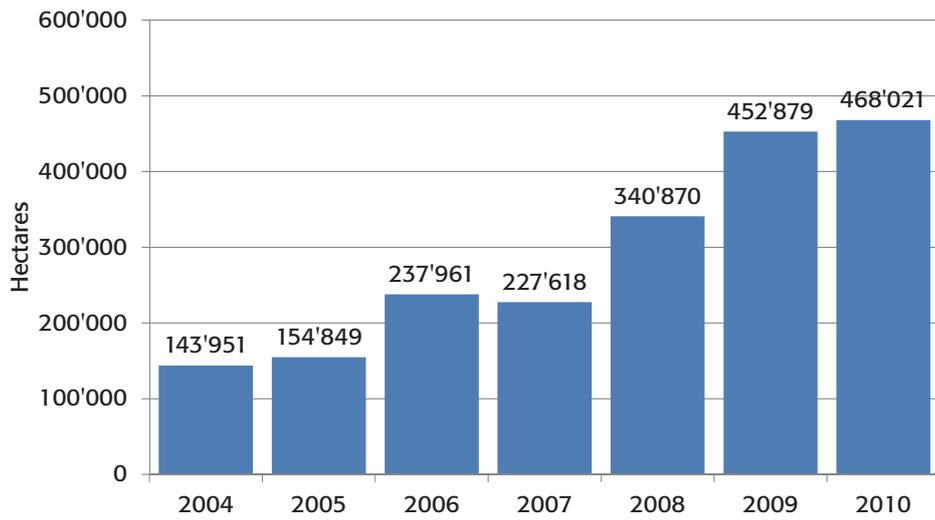


Figure 36: Organic oilseed area: Growth 2004-2010

Source: FiBL, IFOAM and SOEL 2006-2012

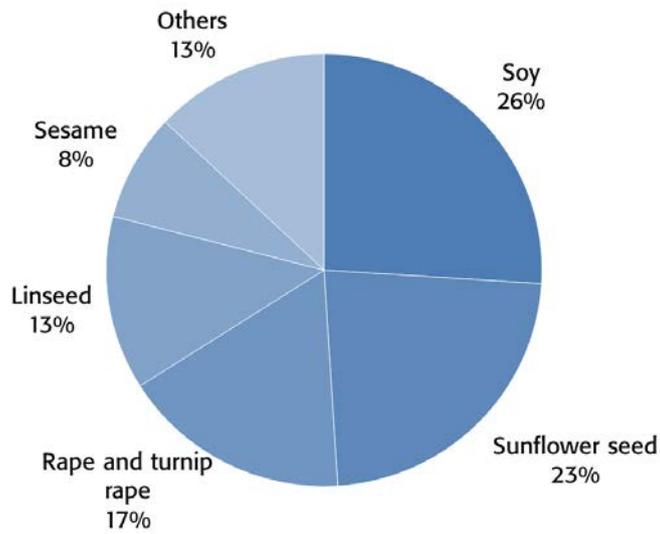


Figure 37: Organic oilseed area: Distribution of oilseed area by crop 2010

Source: FiBL-IFOAM 2012

Table 33: Organic oilseeds area 2010

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	22'247	0.1%	2'203	
Australia	217	0.0%		
Austria	13'064	9.7%		
Azerbaijan	76	0.5%	30	46
Bangla Desh	24	.	24	
Belgium	69*5	0.3%	43	22
Belize	85	24.4%	85	
Bolivia	389	0.0%	389	
Brazil	6'800	0.0%		
Bulgaria	1'983	0.2%	498	1'485
Burkina Faso	3'498	0.6%	1'096	
Cameroon	1	0.0%	1	
Canada	42'269	0.5%	42'269	
Croatia	2'449	2.4%	269	2'180
Czech Republic	2'303	0.5%	444	1'859
Denmark	700	0.4%	628	72
Ecuador	401	0.5%	401	
El Salvador	839	21.9%	839	
Estonia	1'874	2.3%	695	1'179
Ethiopia	11'100	1.3%	11'100	
Finland	4'197	5.2%	4'197	
France	24'482	1.1%	14'769	9'713
Germany	6'800	0.4%		
Greece	1'910	6.4%	1'891	19
Guatemala	342	0.6%		342
Hungary	7'317	0.9%	6'042	1'275
Iran	100	0.0%	100	
Israel	286	3.0%	286	
Italy	10'822	3.8%	9'471	1'351
Kazakhstan	31'697	2.9%		
Kyrgyzstan	114	0.2%	40	74
Latvia	1'143	1.2%	1'075	69
Lithuania	3'349	1.7%	1'724	1'625
Luxembourg	4	0.1%	1	3
Malawi	24	0.0%	12	12
Mali	5'566	1.5%	3'149	
Mexico	2'265	1.0%	2'265	
Moldova	1'405	.		
Mozambique	768	0.1%		
Netherlands	28	0.5%	28	
Nicaragua	2'500	6.2%	2'500	
Paraguay	4'000	0.1%	4'000	
Peru	1'442	16.1%	1'419	24
Poland	2'381	0.3%	1'860	521
Romania	45'521	3.7%	21'699	23'822
Senegal	409	0.0%	409	
Serbia	506	0.2%	57	449
Slovakia	3'636	1.4%	1'479	2'157
Slovenia	114	2.4%	95	19
South Africa	20	0.0%	20	0
Spain	6'783	0.8%	2'660	4'123
Sudan	7'604	0.3%	7'604	
Sweden	2'950	2.7%	2'342	608

Country	Area organic [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Switzerland	338	1.3%		
The FYRO Macedonia	47	0.9%	7	41
Togo	2'015	2.8%	2'015	
Turkey	787	0.1%	337	450
Ukraine	40'966	0.7%	40'966	
United Kingdom	325	0.1%	268	57
UR Tanzania	5'057	0.6%	3'557	1'500
USA	127'116	0.4%	127'116	
Uruguay	200	0.0%	200	
Zimbabwe	301	0.1%	126	175
Total	468'021	0.2%	326'798	55'271

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307. Blank cells: no data.

› **Protein crops**

The total area under organic protein crops recorded here (300'000 hectares), is 0.5 percent of the total area of protein crops grown in the world (65 million hectares in 2009 according to FAOSTAT).

Of the three most important protein crop growers in the world (India, Niger, and Brazil), with India (19 million hectares) by far the largest grower, no current data on the organic area were available.

The countries with the largest organic protein crop areas are Spain, Lithuania, Brazil, and Germany.

Since 2004, when data on land use and crops were collected for the first time, the protein crop area quadrupled from almost 80'000 to 300'000 hectares. However, some of the increase must be attributed to continually improving availability of crop data.

Unfortunately, for protein crops a breakdown for individual crops is not available for many countries. For instance, Eurostat—the statistical office of the European Union—communicates only one figure for “dried pulses”.

The data available for a breakdown of the total fully converted and in-conversion area covered approximately two-thirds of the total area under organic protein crops. If the relative figures are indicative of the proportions of the total area, one quarter percent is in-conversion, and will be fully converted in the next few years. This has implications for the availability of organic protein crops in the near future.

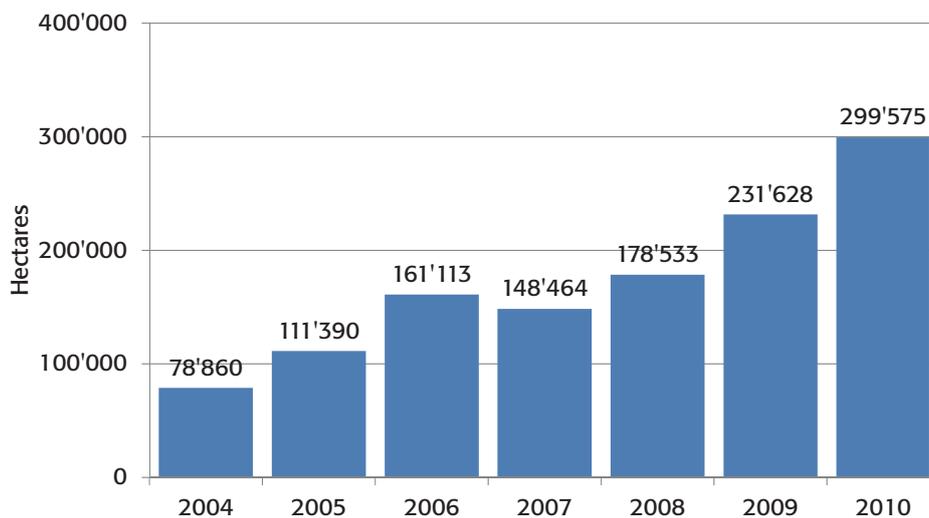


Figure 38: Organic protein crop area: Growth 2004-2010

Source: FiBL, IFOAM and SOEL 2006-2012

Table 34: Organic protein crop area 2010

Country	Area organic [ha]	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Argentina	917	0.3%	877	
Australia	18	0.0%		
Austria	12'425			
Azerbaijan	6	0.1%	3	3
Belgium	512		306	206
Bolivia	166	0.3%	166	
Brazil	27'700	0.7%		
Burkina Faso	35	0.0%	35	
Canada	23'801	0.9%	23'801	
Costa Rica	33	0.2%		
Croatia	5	0.1%	5	0
Czech Republic	1'785	7.7%	983	802
Denmark	6'915		5'932	983
Ecuador	82	0.1%	82	
Estonia	339	6.9%	205	134
Finland	7'230		7'230	
France	24'244	11.2%	17'437	6'807
Germany	27'000			
Greece	5'723	24.6%	5'550	173
Hungary	1'385	6.9%	1'165	220
Italy	25'619	28.0%	21'679	3'940
Kyrgyzstan	65	0.2%	58	7
Latvia	1'008		762	246
Lithuania	27'754		22'709	5'045
Luxembourg	74	27.1%	71	3
Mexico	1'231	0.1%	1'231	
Moldova	8'438	.		
Netherlands	119	2.3%	119	
Peru	3	0.0%	3	1
Poland	4'899	7.7%	2'861	2'038
Romania	5'560	10.7%	2'204	3'356
Slovakia	1'706	20.7%	1'295	411
Spain	39'367	13.7%	16'818	22'549
Sweden	8'652		7'136	1'516
Switzerland	239	6.3%		
Turkey	6'845	0.8%	5'003	1'843
Ukraine	10'168	3.0%	10'168	
United Kingdom	1'899	2.6%	1'856	43
United States of America	15'608	1.4%	15'608	
Total	299'575	0.5%	173'357	50'326

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307. Blank cells: No data.

For some of the countries in this table, the organic protein crop share was very high and not plausible; the corresponding figures were, therefore, eliminated.

> Vegetables

The total area under organic vegetables recorded here (270'000 hectares), is 0.5 percent of the total area of vegetables grown in the world (58 million hectares in 2009 according to FAOSTAT).

Of the three most important vegetable growers in the world (China, India, Nigeria, and Turkey), organic data are only available for Turkey.

The countries with the largest organic vegetable areas are the United States, Mexico, Brazil, and Italy (all with more than 20'000 hectares).

The highest shares of the total vegetable areas are in Denmark, Switzerland, Austria, and Germany. These are also the countries in Europe that have the largest organic market shares for organic food.

Since 2004, when data on organic land use and crops were collected for the first time, the vegetable area almost trebled from 100'000 to the current 270'000 hectares. However, some of the increase must be attributed to continually improving availability of crop data.

Unfortunately, for vegetables, a breakdown for individual vegetable groups is available for only half of the organic vegetable area. A large part (35'000 hectares) is for pulses (fresh beans and peas), followed by leafy and stalked vegetables (salads) and fruit vegetables (tomatoes and cucumbers).

The data available for a breakdown of the total in fully converted and in-conversion area covered approximately three-quarters of the total area under organic vegetables. If the relative figures are indicative of the proportions of the total area, 10 percent is in-conversion, and will be fully converted in the next few years, implying that there will probably not be a major increase of the organic vegetable area.

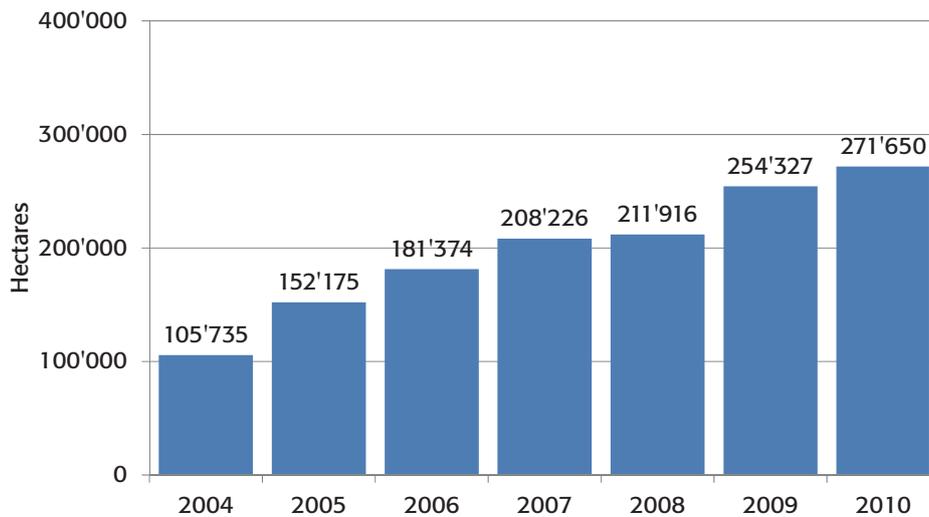


Figure 39: Organic vegetable area: Growth 2004-2010

Source: FiBL, IFOAM and SOEL 2012

Table 35: Organic vegetable area 2010

Country	Area organic [ha]	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Albania	5	0.0%	1	4
Argentina	1'099	0.7%		
Australia	1'388	2.5%		
Austria	2'050	14.0%		
Azerbaijan	394	0.4%	184	283
Bangla Desh	8	.	8	
Belgium	580	1.1%	478	102
Belize	2	0.2%	2	
Benin	4	0.0%	2	2
Bosnia and Herzegovina	174	0.1%		
Brazil	31'000	6.6%		
Bulgaria	321	1.1%	141	180
Canada	1'884	2.8%	1'884	
Chile	180	0.3%	180	
Colombia	82	0.1%	82	
Costa Rica	101	0.8%		
Croatia	283	1.8%	112	171
Cyprus	37	1.2%	24	13
Czech Republic	1'025	3.3%	853	173
Denmark	1'750	21.9%	1'728	22
Ecuador	373	0.2%	309	64
El Salvador	34	0.6%	34	
Estonia	105	4.4%	71	34
Ethiopia	180	0.0%		180
Finland	169	2.4%	169	
France	11'502	5.4%	9'797	1'705
French Guiana (France)	17	1.6%	17	
Georgia	12	0.1%		
Germany	11'590	11.3%		
Greece	3'205	2.8%	2'741	464
Guadeloupe (France)	6	0.1%	1	5
Guatemala	675	0.7%	375	300
Hungary	1'388	2.5%	1'316	72
Indonesia	150	0.0%	131	19
Iran (Islamic Republic of)	86	0.0%	10	76
Ireland	441	10.1%	343	98
Israel	701	1.2%	701	
Italy	27'700	5.4%	21'763	5'937
Jamaica	241	1.8%		
Japan	4'396	1.2%	4'396	

Country	Area organic [ha]	Organic Share	Area fully converted [ha]	Area under conversion [ha]
Jordan	6	0.0%	5	1
Kenya	483	0.2%	459	23
Kyrgyzstan	78	0.2%	2	76
Lao People's Democratic Republic	591	0.5%	37	554
Latvia	244	3.8%	219	25
Liechtenstein	20	.	28	
Lithuania	16	0.1%	15	1
Luxembourg	33	92.3%	29	5
Malawi	104	0.1%		104
Malta	11	0.2%	11	
Martinique (France)	19	0.8%	18	1
Mexico	35'550	5.7%	35'550	
Montenegro	2	0.0%		2
Morocco	980	0.5%		
Netherlands	3'732	4.4%	3'726	6
Nicaragua	1	0.0%	1	
Norway	228	4.0%	215	13
Oman	17	0.1%		
Panama	3'028	8.8%		
Peru	1'001	0.6%	45	956
Philippines	6	0.0%	6	
Poland	5'200	2.2%	3'114	2'086
Portugal	737	0.9%		
Republic of Korea	3'138	0.9%		
Réunion (France)	30	0.3%	23	6
Romania	732	0.2%	91	641
Senegal	2	0.0%		
Serbia	309	0.2%	150	159
Slovakia	1'934	7.4%	1'626	308
Slovenia	119	2.8%	108	11
South Africa	2'559	2.5%	2'515	148
Spain	10'074	2.8%	7'529	2'545
Sri Lanka	2	0.0%		
Sweden	979	5.1%	957	22
Switzerland	2'053	16.9%		
Taiwan	913	.		
Thailand	1'128	0.3%		
The former Yugoslav Republic of Macedonia	200	0.4%	36	164
Tunisia	222	0.1%		
Turkey	2'776	0.3%	1'895	881
Ukraine	5'549	1.1%	5'549	

Country	Area organic [ha]	Organic Share	Area fully converted [ha]	Area under conversion [ha]
United Arab Emirates	4	0.0%	4	
United Kingdom	15'621	6.2%	15'122	499
United States of America	63'380	7.1%	63'380	
Uruguay	300	3.8%	300	
Zambia	525	0.5%	225	300
Zimbabwe	1'678	3.4%	783	895
Total	271'650	0.5%	192'027	20'542

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Data collection on organic agriculture worldwide: Background

Data collection systems and data availability

In general, data availability is improving every year. This is because more and more countries are establishing data collection systems. Data on land use, crops, production, and operators are being more widely gathered, either by the private sector or by government organizations.

The availability of market and trade data is also improving; these data are, however, often collected under another system than the data related to primary production.

Governmental data collection systems for primary production related data

Governmental data collection systems are often linked to the establishment of regulations about organic agriculture. Once such a regulation is established, there are rules about the registration of certifiers with a national authority. This opens up access to data from the certifiers. Public data collection systems mostly cover the organic area and operators, and also sometimes production and export data, but they mostly exclude data on the domestic market and on imports.

In most countries, the government collection systems are based on the data of the certifiers.¹ In the European Union, the new organic farming regulation describes precisely what data should be provided by the competent authorities who collect the data among the certifiers/inspection bodies.² The data collected by the government are mostly (though not always) complete, as many countries do not have access to the data of foreign certifiers that are not registered under the country's accreditation system.

¹ Other systems include:

Farms that receive direct payments as the basis for the data (Switzerland)

Farm structure survey: Some countries have included the option to identify organic farms in the framework of general farm structure surveys.

² Commission Regulation (EC) No 889/2008 of 5 September 2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control

Preamble (36), page 4, L 250/4:

"Notifications of information by the Member States to the Commission must enable it to use the information sent directly and as effectively as possible for the management of statistical information and referential data. To achieve this objective, all information to be made available or to be communicated between the Member States and the Commission should be sent electronically or in digital form."

Article 93, page 36 Statistical information, L 250/31:

1. Member States shall provide the Commission with the annual statistical information on organic production referred to in Article 36 of Regulation (EC) No 834/2007 by using the computer system enabling electronic exchanges of documents and information made available by the Commission (Eurostat) before 1 July each year.

2. The statistical information referred to in paragraph 1 shall comprise, in particular the following data:

(a) the number of organic producers, processors, importers and exporters;
 (b) the organic crop production and crop area under conversion and under organic production;
 (c) the organic livestock numbers and the organic animal products;
 (d) the data on organic industrial production by type of activities.

3. For the transmission of the statistical information referred to in paragraphs 1 and 2, Member States shall use the Single Entry point provided by the Commission (Eurostat).

4. The provisions relating to the characteristics of statistical data and metadata shall be defined within the context of the Community Statistical Programme on the basis of models or questionnaires made available via the system referred to in paragraph 1.

In many cases, the private sector collates the data from the certifiers or the organic operators (for example, the exporters) in the countries. Oftentimes, however, the private sector does not have full access to the data.

Finally, there are countries that have no collection system in place. Collection systems are still underdeveloped, particularly in Africa and in Asia, but also in countries in other regions such as Oceania. For these countries, FiBL and IFOAM attempt to get the data from major international certifiers or from contacts in the country, who provide the data specifically for the survey. These data are often not complete, and there is a problem of continuity over the years.

Regional initiatives

The following are notable initiatives that have improved data collection systems recently, or are in the process of being set up.

The European Commission stipulates that all EU member states provide data for variables such as area, land use, number of operators, and livestock, as well as production volumes. Eurostat, the statistical office of the European Union, compiles these data, which are accessible on the Eurostat homepage.¹ While most countries provided these data in the past, the EU regulation that obliges them to do so did not come into force until January 2010. A new European-funded research project, OrganicDataNetwork² to improve collection of market data has started in February 2012.

The Mediterranean Organic Agriculture Network (MOAN): The Mediterranean Agricultural Institute in Bari, Italy, has set up this network of the authorities in charge of organic farming in order to promote data collection among these. Regular meetings and support through the Mediterranean Agronomic Institute of Bari (IAMB) have considerably improved the data collection in the Mediterranean area in the past years (see article by Al Bitar et al., page 237).

Central America: RUTA, the Regional Unit for Technical Assistance for Sustainable Rural Development in Central America, is now supporting the data collection in this region and data access has improved considerably. There are also plans to publish the data on RUTA's organic farming homepage at www.ruta.org/rediao/.

Pacific Islands: In the Pacific Islands, there are currently efforts to coordinate the organic activities in the region better, which also includes the setting up of data collection systems (see also article by Karen Mapusua, page 292).

¹ Access via <http://epp.eurostat.ec.europa.eu/portal/page/portal/agriculture/data/database>

² OrganicDataNetwork: Data network for better European organic market information. Information is available at http://ec.europa.eu/research/bioeconomy/agriculture/projects/organicdatanetwork_en.htm

Available data

For the 13th survey on organic agriculture worldwide, data on organic agriculture were available for 160 countries and 75 percent of all countries are covered in the survey (see Table 1, page 36). Since 1999, when the data collection started, the number of countries included has almost doubled.

Whereas originally for the global organic survey only information on the total organic land and the number of farms was collected, the scope of the survey has expanded considerably in the past years, which was made possible by the funding of the Swiss State Secretariat of Economic Affairs (SECO) and the International Trade Centre (ITC).

Next global survey on organic agriculture

The next global organic survey will start early 2012. We would be very grateful if data could be sent to us, but we will of course also contact all experts. Should you notice any errors regarding the statistical data in this volume, please let us know; we will then correct the information in our database and provide the corrected data in the 2013 edition of *The World of Organic Agriculture*. Corrections will also be posted at www.organic-world.net.

Contact

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Further reading

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Global Market

The Global Market for Organic Food & Drink¹

AMARJIT SAHOTA²

Introduction

Global sales of organic food & drink reached 59 billion US dollars in 2010. As shown in Figure 40, the market has expanded over three-fold in ten years. Although growth has slowed since the financial crisis started in 2008, sales have continued to increase at a healthy pace.

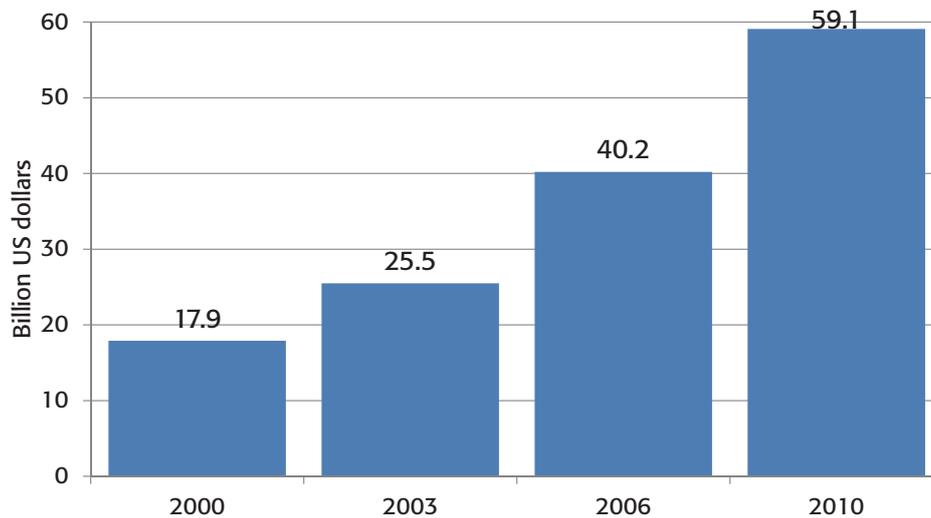


Figure 40: Global market for organic food & drink. Market growth 2000-2010

Source: The Global Market for Organic Food & Drink (Organic Monitor). Note: All figures are rounded

Organic farming is practiced on every continent, however, demand for organic products is concentrated in two regions; North America and Europe comprise 96 percent of global revenues. The high degree of sales concentration highlights the disparity between production and consumption. Indeed, most organic food production in regions such as Africa and Latin America is export-gearred. In contrast, some organic food markets such as those in Singapore and Japan are highly import-dependent.

Low consumer awareness and the high price premium of organic products are factors that limit demand to the most affluent countries. Considering the two leading regions are

¹ This chapter has been prepared using the report "The Global Market for Organic Food & Drink: Briefing & Outlook (Organic Monitor, Feb 2012)." No part of this chapter maybe reproduced or used in other commercial publications without written consent from Organic Monitor. To request permission, please write to Organic Monitor, 20B The Mall, London W5 2PJ, Tel. +44 20 8567 0788, E-mail: postmaster@organicmonitor.com

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suffering financial crises, over-concentration of demand puts the organic food industry in a potentially fragile position. A major challenge is to spread demand to other geographic regions, otherwise further weakening of the European and North American economies could stunt market growth rates.

Supply-demand imbalances remain a feature of the organic food industry. The conversion period to organic agriculture, typically two years, causes supply to lag behind demand. Thus, some sectors of the organic food industry face product shortages, whilst others experience overproduction. The re-emergence of food inflation is also a major concern. Rising prices of food products and agricultural inputs are deterring growers to convert to organic agriculture. Indeed, the US market was experiencing organic milk shortages in the latter part of 2010 because of a shortage of organic dairy farmers.

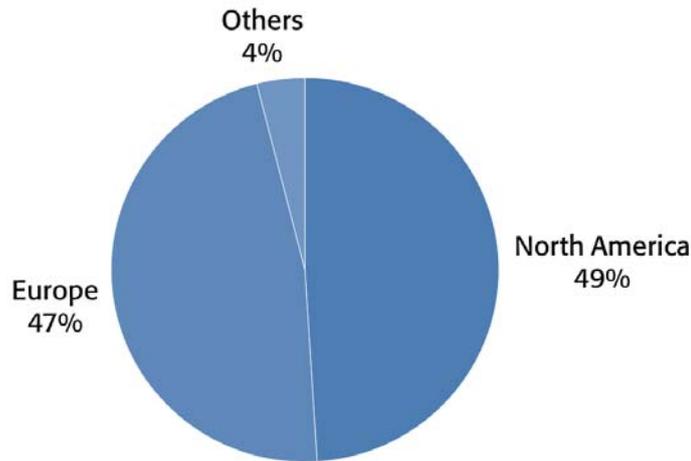


Figure 41: Global market for organic food & drink. Distribution of revenues by region 2010

Source: The Global Market for Organic Food & Drink (Organic Monitor). Note: All figures are rounded

Europe

The European market for organic food & drink was worth 28 billion US dollars in 2010. The continent has the second largest market for organic products; it also houses eight of the largest 10 country markets in the world. Slowing market growth rates and high number of brands make the European market the most competitive in the world.

Germany has the largest market for organic products, comprising almost a third of regional revenues. France, the UK, and Italy, have over 70 percent sales share. The largest consumers of organic foods, however, are in Scandinavian and Alpine countries. Denmark has the highest market share, where organic products comprise over 7 percent of food and drink sales.

Although production of organic crops is increasing across Europe, demand is concentrated in central and northern European countries. Most organic food production in Spain, Greece, and Portugal is geared for export markets. Major organic agricultural exports include organic fruits, vegetables, herbs, spices, and olive oil.

Central & Eastern Europe (CEE) has a small but growing market for organic products. Similar to southern Europe, agricultural crops are mainly grown for export markets. The lack of organic food processing leads most processed products to be imported in from Western Europe. The Czech Republic, Poland, and Hungary have the most important markets for organic food & drink.

Europe has the largest number of organic food enterprises in the world. The heterogeneity of the region prevents few companies that have a strong presence outside their home markets. Private labels are most evident in Europe; organic products are marketed under private labels of organic food retailers, supermarkets, drugstores, discounters, and pharmacies.

North America

North America has overtaken Europe to have the largest market for organic food & drink in the world. The market was worth 28.6 billion US dollars in 2010, comprising almost half of global revenues. Most sales are from the US market where organic products have 4 percent share of total food & drink.

The US is a leading producer and exporter of organic agricultural goods, however many sectors remain import dependent. Domestic supply of organic products is falling short of demand, with products coming in from many continents. Significant volumes of organic fruits, vegetables, meats, beans, seeds, herbs & spices and ingredients are imported into North America. Latin America is the main source, although imports are also increasing from Africa, Europe, and Australasia.

Most demand for organic products comes from conventional grocery channels. Almost 60 percent of organic food & drink sales are from supermarkets, discount stores and mass merchandisers. Private labels are highly established in North America; all major food retailers are marketing organic foods under their brands. O Organics, the private label of Safeway supermarkets, is the leading brand of organic foods in the US. Housing over 300 organic products, O Organics generates almost 0.5 billion US dollars sales. In Canada, the PC Organics private label of Loblaw's supermarkets is the leading brand of organic foods.

Consolidation has led the organic food industry in North America to become concentrated. A number of mergers, acquisitions, and investments have caused large companies to control the production, distribution, and retailing of organic products. Conventional food companies with a significant market presence include Dean Foods, Coca-Cola, Danone, and Hersheys. UNFI is the dominant distributor of organic products, whilst Whole Foods Market and Trader Joe's are the main natural food retailers.

The Catering & Foodservice Sector (CFS) has become an important channel for organic products. A growing number of foodservice outlets are serving organic products, whilst catering establishments are increasingly using organic ingredients. For instance, Starbucks serves organic coffee and milk in many of its 11'000 outlets in North America. The Bon Appetit Management Company is providing a "Sustainable Food Service" option to its catering establishments, offering organic milk, vegetables, wheat, and other organic products.

Asia

There is a significant difference between production and consumption of organic products in Asia. There are the large organic producer countries: China, India, Thailand, Indonesia, the Philippines, and Vietnam. These countries mainly grow organic products for the export market. Important organic agricultural exports include fruits, vegetables, herbs, spices, rice, tea, and ingredients.

Demand for organic products is concentrated in the most affluent countries. The large consumer countries include Japan, South Korea, Taiwan, Hong Kong, and Singapore. Although demand for organic products is high, relatively little is grown here.

Growing from a small base, organic food & drink sales are increasing at a healthy rate in Asia. Rising consumer awareness of organic foods and expanding distribution are the major drivers of market growth. A growing number of mainstream retailers are introducing organic products, some under their private labels. Asian consumers are buying organic products as they become more aware of food safety and ecological issues. Food scandals, especially those involving Chinese products, are making consumers more concerned about food safety.

The Asian market has many impediments to market growth. The lack of standards in the region is hindering trade of organic products. Few Asian countries have introduced mandatory standards for organic agriculture and foods; most countries either do not have national standards or have voluntary standards. Consumers, therefore, cannot distinguish between legitimate organic products and competing products that are often marketed on similar attributes such as 'chemical-free' or 'low pesticides'. There is also an absence of equivalency between national standards. Thus, producers and importers often have to get multiple certifications for their organic products.

Oceania

Australia, New Zealand, and the Pacific Islands have a small market for organic products. About a third of the world's organic agricultural land is in this continent, however, the share of global organic food & drink sales is less than 2 percent.

Almost all organic food & drink sales are from Australia and New Zealand. Both countries have the distinction of important producers, consumers and exporters of organic products. These countries export significant volumes of organic beef, lamb, wool, kiwi fruit, wine, apples, pears, and vegetables. Asia is the major destination; however, exports also go to Europe and North America.

As in Europe and North America, large food companies and retailers are active in the organic food market. Woolworths became the leading retailer when it acquired the Macro Wholefoods chain of organic food shops in 2009. It has integrated these stores under the Thomas Dux Grocer banner. Large food companies, such as Fonterra and Sanitarium, have taken up strong market positions by expanding their organic product ranges.

Other Regions

Consumer demand for organic products is also rising in other regions. Latin America is a major producer and exporter of organic products, however internal markets are beginning to slowly develop. Brazil is poised to have the largest market for organic food & drink in the

region; rising production levels and growing consumer awareness are expanding the organic food market. A major issue in Latin American countries is the lack of organic food processing, since mostly primary crops are grown.

Almost all organic food production in Africa is for the export market. South Africa has the largest market in this continent. Woolworths, a leading supermarket, is active in encouraging organic food production and consumption. Internal markets are also developing in Egypt, Saudi Arabia, United Arab Emirates, and Kuwait. Israel has the largest market in the Middle-East region.

Conclusions & Outlook

Starting from almost nothing in 1990, the global market for organic food & drink is now worth about 60 billion US dollars. The market expanded almost three-fold between 2000 and 2010; however, growth in the next decade is expected to be at a slower rate.

With the European and North American economies plagued by financial crises, a major question mark hangs over growth rates in these two regions. If the European debt crisis worsens and / or the euro continues to weaken, then demand will be severely affected in 2012 and subsequent years. Indeed, the UK market for organic products contracted in 2009 and 2010 because of the poor consumer sentiment created by the financial crisis. As a growing number of European countries introduce austerity measures, demand for organic foods will be affected.

North America has overtaken Europe to have the largest market for organic products. Although healthy growth has continued since 2008, the state of the US economy remains a major concern. Slowing market growth rates are predicted as consumer confidence remains weak.

As organic food production continues to rise across the globe, some sectors are expected to experience overproduction. Slowing demand in Europe and possibly in North America is predicted to cause overproduction. Many growers in Africa, Asia, and Latin America are likely to be affected. If many of these growers convert back to conventional farming, the organic food industry will face another phase of undersupply when growth rates recover after the financial crises.

In conclusion, the global organic food industry has shown tremendous growth up to 2010. Since demand is concentrated in two regions that are experiencing financial crises, growth in the coming few years is expected to be at a slower rate. With organic food production now occurring in every continent, demand needs to spread outside North America and Europe. Only then can the organic food industry be considered to have become truly global.

Further market-related information in this volume

Further market data related to organic agriculture are available in the Statistics chapter, Table 12: Global market data: Domestic sales, per capita consumption, and exports by country 2010, page 68.

Market information is also available from the regional and country chapters, see tables of contents for market sections.

Standards and Regulations

Standards and Regulations

BEATE HUBER¹, OTTO SCHMID², AND GBATI NAPO-BITANTEM³

The year 2011 was a year of further consolidation in the field of standards and regulations.⁴ Relevant work has been carried out to facilitate the international organic trade and reduce trade barriers. The European Union and the United States achieved a breakthrough in their negotiations concerning the mutual recognition of their organic standards and control systems. The formal arrangements are expected to be finalized and implemented in early 2012. These arrangements will lead to a considerable reduction of bureaucracy for trading organic products between the EU and the US. Furthermore, after two years of assessment and internal negotiations, the European Commission published the first list of control bodies recognized for operations in countries outside the European Union.

Organic legislations worldwide: current situation

According to the FiBL survey on organic rules and regulations, the number of countries with organic standards has increased to 84. There are 24 countries that are in the process of drafting legislation. A special case is Ukraine, where the parliament adopted an organic legislation in 2011, but it did not come into force due to a veto of the Ukrainian president.

The data on regulations around the world were collected by various authorities and experts. Regulations were categorized as “not fully implemented” or “fully implemented” based directly on the feedback from the persons interviewed. The information received was not subject to verification. We received responses from experts and authorities from the majority of the countries. It is assumed that the non-responding countries did not pass legislation on organic production, although the share of countries in the process of developing legislation is probably greater than reflected in the tables.

For the list of countries with regulations or in the process of drafting regulations on organic agriculture see Table 36 and Table 37. Please send comments or information on countries not listed to beate.huber@fibl.org.

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³ Gbati Napo-Bitantem, Research Institute of Organic Agriculture (FiBL), CH-5070 Frick, Internet www.fibl.org

⁴ For a brief history of organic standards and regulations see www.organic-world.net/rules.html as well as previous versions of this article as published in the various editions of *The World of Organic Agriculture*. These can be downloaded at www.organic-world.net/former-editions.html.

Table 36: Countries with regulations on organic agriculture

Region	Country	Remark
European Union (27)¹	Austria	Fully implemented
	Belgium	Fully implemented
	Bulgaria	Fully implemented
	Cyprus	Fully implemented
	Czech Republic	Fully implemented
	Denmark	Fully implemented
	Estonia	Fully implemented
	Finland	Fully implemented
	France	Fully implemented
	Germany	Fully implemented
	Greece	Fully implemented
	Hungary	Fully implemented
	Ireland	Fully implemented
	Italy	Fully implemented
	Latvia	Fully implemented
	Lithuania	Fully implemented
	Luxemburg	Fully implemented
	Malta	Fully implemented
	Poland	Fully implemented
	Portugal	Fully implemented
	Romania	Fully implemented
	Slovak Republic	Fully implemented
	Slovenia	Fully implemented
	Spain	Fully implemented
	Sweden	Fully implemented
	The Netherland	Fully implemented
	United Kingdom	Fully implemented
Non-EU Europe (11)	Albania	Fully implemented
	Croatia	Fully implemented
	Iceland ²	Fully implemented
	Kosovo	Not fully implemented
	Macedonia, FYROM	Fully implemented
	Moldova	Fully implemented
	Montenegro	Fully implemented
	Norway	Fully implemented
	Serbia	Fully implemented
	Switzerland ³	Fully implemented
	Turkey	Fully implemented
Asia & Pacific Region (24)	Armenia	Fully implemented
	Australia	Fully implemented
	Azerbaijan	Not fully implemented
	Bahrain	Not fully implemented
	Bhutan	Not fully implemented
	China	Fully implemented
	Georgia	Fully implemented

¹ Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/92. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF>

² www.landbunadarraduneyti.is/log-og-reglugerdir/Reglugerdir/Allar_reglugerdir/nr/79

³ www.admin.ch/ch/d/sr/c910_18.html

	India ¹	Fully implemented
	Indonesia	Fully implemented
	Iran	Not fully implemented
	Israel	Fully implemented
	Japan ²	Fully implemented
	Jordan	Not fully implemented
	Korea, South	Fully implemented
	Kuwait	Not fully implemented
	Malaysia	Not fully implemented
	New Zealand ³	Fully implemented
	Oman	Not fully implemented
	Philippines	Fully implemented
	Qatar	Not fully implemented
	Saudi Arabia	Fully implemented
	Taiwan	Fully implemented
	Thailand ⁴	Fully implemented
	United Arab Emirates	Not fully implemented
The Americas & Caribbean (21)	Argentina	Fully implemented
	Bolivia ⁵	Fully implemented
	Brazil ⁶	Fully implemented
	Canada	Fully implemented
	Chile	Fully implemented
	Colombia	Fully implemented
	Costa Rica	Fully implemented
	Dominican Republic	Fully implemented
	Cuba	Not fully implemented
	Ecuador	Fully implemented
	El Salvador	Not fully implemented
	Guatemala	Fully implemented
	Honduras ⁷	Fully implemented
	Mexico	Fully implemented
	Nicaragua	Not fully implemented
	Panama	Fully implemented
	Paraguay ⁸	Not fully implemented
	Peru ⁹	Fully implemented
	Uruguay	Not fully implemented
	USA ¹⁰	Fully implemented
	Venezuela	Not fully implemented
Africa (1)	Tunisia	Fully implemented

Source: Huber, Napo-Bitantem

¹ <http://www.apeda.gov.in/apedawebsite/organic/index.htm>

² JAS Standards for organic plants and organic processed foods: www.maff.go.jp/e/jas/specific/organic.html

³ New Zealand Food Safety Authority (NZFSA) Official Assurance Programme for Organic Products: <http://www.foodsafety.govt.nz/industry/sectors/organics>

⁴ Homepage of the National Bureau of Agricultural Commodity and Food Standards, www.acfs.go.th/eng/index.php

⁵ www.aopeb.org/

⁶ www.planetaorganico.com.br

⁷ www.senasa-sag.gob.hn/

⁸ www.senave.gov.py/index.php?pag=ampliamos&Cod_noticias=102

⁹ www.senasa.gob.pe/0/modulos/JER/JER_Interna.aspx?ARE=0&PFL=3&JER=134

¹⁰ www.ams.usda.gov/AMSv1.0/nop

Table 37: Countries in the process of drafting regulations

Region	Country
Europe (3)	Bosnia & Herzegovina
	Russia
	Ukraine
Asia and Pacific Region (9)	Hong Kong
	Kyrgyzstan
	Laos
	Lebanon
	Nepal
	Pakistan
	Sri Lanka
	Syria
	Vietnam
The Americas & Caribbean (2)	Jamaica
	St. Lucia
Africa (6)	Egypt
	Morocco
	Senegal
	South Africa ¹
	Zambia
	Zimbabwe

Source: Huber, Napo-Bitantem

The IFOAM Organic Guarantee System

The International Federation of Organic Agriculture Movements (IFOAM) recently revised its Organic Guarantee System (OGS). The new system approved in July 2010 contains several services that are outlined below.²

The IFOAM Family of Standards³

The IFOAM Family of Standards is the only tool set up to enable multilateral equivalence. This is an important step towards regulated, but streamlined market access. The principle of the IFOAM Family of Standards is to conduct equivalence assessments of each standard/regulation against one single international reference, called COROS—Common Objectives and Requirements of Organic Standards.

COROS was agreed upon by IFOAM members and was developed by IFOAM, the Food and Agriculture Organisation of the United Nations (FAO), and the United Nation's Conference on Trade and Development (UNCTAD) under the GOMA project (Global Organic Market Access, www.goma-organic.org). Hence, the IFOAM Family of Standards shall become the one tool that will differentiate between organic standards and non-organic standards.



Figure 42: The logo of the IFOAM Family of Standards may be used by owners of approved standards.

¹ www.afrisco.net/Html/Product_Stardards.htm

² More information is available at www.ifoam.org/about_ifoam/standards/ogs.html. Frequent information can be obtained by subscribing to the OGS Courier, a free electronic newsletter about the IFOAM Organic Guarantee System.

³ For the standards approved for the family of standards see http://www.ifoam.org/about_ifoam/standards/family_of_standards/FamilyFrame_web.pdf

IFOAM's vision is for the family of standards to contain all organic standards and regulations equivalent to the international reference.

The Global Organic Mark

Organic operators conforming to the family of standards and approved by a certifier can apply to use the Global Organic Mark on their products. IFOAM promotes the Global Organic Mark to consumers worldwide.



Figure 43: IFOAM's Global Organic Mark

The IFOAM Accreditation & the Global Organic System Accreditation (GOSA)

Certifiers can have their processes audited against the IFOAM Accreditation Requirements. The International Organic Accreditation Service (www.IOAS.org), an IFOAM subsidiary, offers the IFOAM Accreditation (analyses of standards and verification processes) or the Global Organic System Accreditation (analyses of verification processes only) and thus grants special recognition of credibility. The accreditation program is primarily a means of ensuring fair and orderly trade of organic products. It is in this sense a service for the trade, producers, as well as for certifiers. The accreditation program facilitates equivalency of organic certification bodies worldwide by confirming whether they meet IFOAM's international norms.



Figure 44: The IFOAM Seal

The IFOAM Seal is a visual mark of the accreditation status of certification bodies active in organic agriculture. The IFOAM Seal consists of the IFOAM logo and the word ACCREDITED and is designed to be presented as part of an accredited certifier's logo.

The IFOAM Standard

The IFOAM Standard is under development and expected to be finalized in 2012. It is intended to be an internationally applicable organic standard that can be used directly for certification. It will also be a highly recognized, globally applicable standard.

The Codex Alimentarius Guidelines: Recent Developments¹

The need for clear and harmonized rules has not only been taken up by private bodies, IFOAM, and state authorities, but also by United Nations Organizations, including the Food and Agriculture Organization of the United Nations (FAO), the World Health Organization (WHO), and the United Nations Conference on Trade and Development (UNCTAD). The Codex Alimentarius Commission approved plant production guidelines in June 1999 and animal production guidelines in July 2001.² They also provide guidance to governments in developing national regulations for organic food.

The annex lists of the Codex Alimentarius Guidelines, which define what substances can be used in organic food and farming systems, have been under revision since 2005, with a focus on substances for food processing and criteria for the use of new substances. A

¹ Information about Codex Alimentarius is available via www.codexalimentarius.net/web/index_en.jsp.

² The Guidelines for the Production, Processing, Labelling and Marketing of Organically Produced Foods, amended in 2010, can be downloaded from www.codexalimentarius.net/download/standards/360/cxg_032e.pdf.

supported by the government of Canada, was appointed this work. The Codex Commission adopted several amendments in the annex lists that were proposed by the CCFL in July 2009. Other substances discussed, such as nitrites and nitrates, as well as ascorbates for meat processing, and phosphates as food additives, however, were not approved in the Codex Guidelines for organic food. In 2010, an amendment was made regarding a more restricted use of rotenone for pest control (the substance should be used in such a way as to prevent its flowing into waterways).

In May 2011, the Codex Committee for Food Labeling agreed on new work (proposed by the EU) on the inclusion of spinosad, copper octanoate, potassium bicarbonate, and uses of ethylene for degreening of citrus for fruit fly prevention and flowering induction in pineapples. Another issue on the agenda is the use of ethylene for ripening of fruit and the use of ethylene for sprout inhibition in onions and potatoes. The debate continued to extend the use of ethylene also for ripening of other tropical fruits other than bananas and kiwi, which is already allowed. Proposals (for specific fruit categories) will be considered at the CCFL meeting in May 2012. The committee also agreed to re-establish the electronic working group led by the United States, which deals with the revision of the regulation and the list of substances. A structured approach in a two-year cycle is envisaged.

Furthermore, it has been agreed to take up another new area: organic aquaculture and seaweed production. In 2011, a first working paper was presented by the EU. A re-drafted version by the EU will be circulated for comments and will be discussed at the next meeting of the Codex Committee for Food Labeling in May 2012.¹

EU regulation on organic production

In July 2007, Council Regulation (EC) No 834/2007 of June 28, 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91 was adopted. It came into force on January 1, 2009.² This regulation describes the objectives, principles, and basic requirements of regulations for organic production. It is supplemented by the implementation rules, which describe the details on production, labeling, control, and imports (Commission Regulation (EC) No 1235/2008 of December 8, 2008, Commission Regulation (EC) No 889/2008 of September 5, 2008; Commission Regulation (EC) No 1254/2008 of December 15, 2008). In 2009, the implementation rules were augmented with the introduction of aquaculture standards.

US National Organic Program (NOP)

The US published new rules for pastures on February 17, 2010. New producers had to be in compliance by July 1, 2010 and renewing producers had to comply by July 2011.³ In addition, the NOP published a book of guidance documents in 2011, which helps certifiers and producers standardize interpretation of the regulation. More information about the NOP is available in the North American section of this volume (see page 256).

¹ Codex Alimentarius (2011): Report of the 29th session of the Codex Committee on Food Labelling on 9 – 13 May 2011. Québec, Canada

² The revised Regulation 834/2007 and its implementation rules are published on the EUR-Lex website, lex.europa.eu. They are available in all official languages of the European Union.

³ For information on the pasture rules see

<http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateN&navID=PastureRulemakingNOPNationalOrganicProgramHome&rightNav1=PastureRulemakingNOPNationalOrganicProgramHome&topNav=&leftNav=NationalOrganicProgram&page=NOPAccessToPasture&resultType=&acct=nopgeninfo>

Import requirements of major economies

The major import markets for organic products are the European Union, the United States, and Japan. All of them have strict regimes for the importation of organic products. In the European Union, the United States, and Japan, products may only be imported if the certifying agency has been approved by the respective competent authority. Approval of certification bodies requires compliance or equivalency with the requirements of the importing countries, which can either be achieved through (a) bilateral agreements between the exporting and the target import country, or (b) direct acceptance of the certifying agency by the target import country.

Bilateral agreements between the exporting and the target importing country

Most importing countries—including the United States, the European Union, and Japan—have options for bilateral recognition (i.e., the option to confirm that another country's control system and its standards are in line with domestic requirements and that the products certified in those countries can be sold on the national market). Bilateral agreements are largely political agreements that depend on the will and political negotiations of the governments, but in part are also based on technical assessments.

After nearly ten years of negotiations, the United States and the European Union finally achieved a breakthrough by recognizing their respective national organic standards and control systems as being equivalent. The formal arrangements are expected to be finalized and implemented in early 2012. These arrangements will lead to a considerable reduction of bureaucracy for trading organic products between the EU and the US. Depending on the detailed arrangements, the recognition might also facilitate international trade with products from other continents.

The US-EU agreement will be the second bilateral agreement. The first agreement was between the US and Canada in 2009. Under a determination of equivalence, producers and processors, who are certified according to the US National Organic Program (NOP)¹ standards by a US Department of Agriculture accredited certifying agent, do not have to become certified to the Canada Organic Product Regulation (COPR) standards in order for their products to be represented as organic in Canada. Likewise, Canadian organic products certified to COPR standards may be sold or labeled in the United States as organically produced.

In addition, the US is negotiating equivalency agreements with Australia, India, and Japan.

The European Union currently recognizes ten countries² as being equivalent with the EU system (what is known as the Third Country list).

The US has otherwise accepted few foreign governments' accreditation procedures. Certification bodies accredited according to the US requirements by Denmark, UK, India, Israel, Japan, and New Zealand are accepted by the United States Department of Agriculture for certifying according to the US National Organic Programme (NOP)—even though they are not directly accredited by United States Department of Agriculture. This level of recognition only covers accreditation procedures; the respective certification bodies still have to meet the requirements of NOP to issue certificates accepted by the US.

¹ National Organic Programme (NOP) www.ams.usda.gov/AMSV1.0/NOP

² Argentina, Australia, Canada, Costa Rica, Japan, India, Israel, New Zealand, Switzerland, and Tunisia

Acceptance of the certifying agency by the target importing country

The US, the EU, and Japan have options for recognizing certification bodies operating outside the country. The technical requirements for achieving such recognition are difficult to meet, and the associated fees are high. Maintaining recognition and/or the necessary accreditation requires substantial financial capacity and personnel from the certification agency.

The EU is currently implementing the new regulations concerning the importation of organic products. In the future, products will only be granted import into the EU if they have been certified by an inspection body or authority recognized by the European Commission.¹ The European Union published the first list of approved control bodies and authorities recognized for applying equivalent standards and control schemes in non-EU countries in December 2011. Certification from recognized control bodies will be accepted for imports to the EU after July 1, 2012. No import authorizations will be needed anymore for such imports. So far, mostly local control bodies in non-EU countries are recognized. The list is expected to be updated prior to July 2012 to cover further applying control bodies, especially European control bodies operating outside the EU.

The US National Organic Program (NOP) requires all produce labeled as organic in the US to meet the US standards, including imported products. The US system provides for the approval of certification bodies as agents to operate a US certification program. Inspections have to be conducted by inspectors trained in NOP requirements using NOP-based questionnaires, and only certificates issued by certification bodies accredited by the US Department of Agriculture (USDA) are accepted. It is not relevant whether the certification body is based in the US or elsewhere. So far, almost 100 certification bodies have been accredited according to NOP requirements by the USDA, and only produce certified by these certification bodies may be exported to the US.

Literature

Commission Regulation (EC) No 1235/2008 of 8 December 2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries; eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:334:0025:0052:EN:PDF

COMMISSION IMPLEMENTING REGULATION (EU) No 1267/2011 of 6 December 2011 amending Regulation (EC) No 1235/2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries

COMMISSION IMPLEMENTING REGULATION (EU) No 590/2011 of 20 June 2011 amending Regulation (EC) No 1235/2008, laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries

¹ There will be three different lists:

- › List of control bodies that apply a control system and production standards equivalent to the EU regulation on organic production (this list will enter into force on July 1, 2012).
- › List of control bodies that have been accredited according to EN 45011/ISO 65 and that apply an inspection system and production rules compliant with the EU regulation on organic production. The provision on compliance with EU regulation on organic production is new (the Commission did not yet assess applications for this list).
- › List of countries whose system of production complies with rules equivalent to the EU's production and inspection provisions (see EU Regulation 1235/2008). Compliance requires a full application of the EU Regulation, e.g. a seed database, and does not accept grower groups with internal control systems, whereas equivalence allows a locally adapted approach.

Under options 1) and 2) the inspection bodies can either be located within or outside the EU. Under options 2) and 3) (equivalency-option), the imported products have to be covered by a certificate of inspection, which is not a provision under option 1).

STANDARDS AND REGULATIONS: OVERVIEW

- COMMISSION IMPLEMENTING REGULATION (EU) No 344/2011 of 8 April 2011 amending Regulation (EC) No 889/2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control
- Commission Regulation (EC) No 1254/2008 of 15 December 2008 amending Regulation (EC) No 889/2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control; eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:337:0080:0082:EN:PDF
- Commission Regulation (EC) No 889/2008 of 5 September 2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control; eur-lex.europa.eu/JOHtml.do?uri=OJ:L:2008:250:SOM:EN:HTML
- COMMISSION IMPLEMENTING REGULATION (EU) No 426/2011 of 2 May 2011 amending Regulation (EC) No 889/2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control
- Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91; eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF
- DiMatteo, Katherine (2007) Overview of group certification. Prepared for the 7th meeting of the UNCTAD/ FAO/ IFOAM International Task Force on Harmonisation and Equivalence in Organic Agriculture in Bali, Indonesia. 27-30 November 2007. http://www.unctad.org/trade_env/itf-organic/meetings/itf7/ITF0711_GrowerGroups.pdf
- European Commission (2008) Guidelines on imports of organic products into the European Union. 15.12.2008. Rev.1. European Commission, Brussels. Available at http://ec.europa.eu/agriculture/organic/files/news/download-material/guidelines_for_imports_en.pdf
- Huber, Beate et al. (2011) "Standards and Regulations," In: Willer/Kilcher (Eds.) The World of Organic Agriculture. Statistics and Emerging Trends 2011, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany and Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.organic-world.net/yearbook.html
- Kilcher, Lukas et al. (2011): The Organic Market in Europe. Overview and Market Access Information for Producers and International Trading Companies. Fourteen Country Examples in the European Free Trade Association and the European Union, with a Special Focus on Switzerland. SIPPO, Zürich and FiBL, Frick
- Schlueter, Marco, Camilla Mikkelsen et al. (2009): The New Organic Regulation for Organic Food and Farming in Europe: EC 834/2007 - Background, assessment and interpretation for stakeholders. IFOAM European Group, Brussels

Websites

- www.fao.org/organicag/en: Information on organic agriculture by FAO with detailed country reports including legal situation
- www.ifoam.org/about_ifoam/standards/index.html: IFOAM Guarantee system
- www.ams.usda.gov/nop/indexIE.htm: Information about the US National Organic Programme (NOP)
- www.unctad.org/trade_env/itf-organic/welcome1.asp: http://www.unctad.org/trade_env/itf-organic/welcome1.asp International Task Force on Harmonization and Equivalency in Organic Agriculture (ITF)
- www.codexalimentarius.net/download/standards/360/CXG_032e.pdf: The Codex Alimentarius Commission and the FAO/WHO Food Standards Programme: Organically Produced Foods, Rome 2007
- ec.europa.eu/agriculture/organic/splash_en: Internet site of the European Commission on organic farming in all European Union languages.
- www.certcost.org: European Union project on the economic analysis of certification systems for organic food and farming.

World of Organic Certification 2012

KOLBJÖRN ÖRJAVIK¹

The ninth edition of “The Organic Certification Directory” will be published in February 2012. The directory lists all the organic certification bodies in the world and is available for free.²

There has been modest growth in the number of certification bodies in most regions of the world, although the number has increased rapidly in some Asian countries, mainly in India. Many of the new certifiers are branch offices of international certification bodies that have gained approval, for instance, by the European Union or the local government. An international certification body that started a branch office that acquired local or other approval, counts as a new certification body in this directory.

The total number of certification bodies is 549, up from 532 in 2010. Most certification bodies are located in the European Union, Japan, the United States, South Korea, China, Canada, India, and Brazil.

Table 38: Certification bodies: The countries with the most certification bodies 2009–2010

Country	2011	2010	2009
Japan	61	59	59
United States of America	51	57	55
South Korea	33	33	32
Germany	31	32	31
China P.R.	28	27	29
Spain	28	28	28
Canada	23	21	21
India	22	17	16
Brazil	20	20	20
Romania	17	18	2
Italy	13	15	16
Poland	11	11	7
United Kingdom	11	12	9

Source: Grolink, The Organic Certification Directory 2012

¹ Kolbjörn ÖrjaviK, Grolink, Kungsgatan 16, Uppsala, 75332, Sweden, news@organicstandard.com, www.grolink.se and www.organicstandard.com

² The Organic Standard (TOS) publishes The Organic Certification Directory annually since 2003. To-date, The Organic Certification Directory is the only international listing of organic certification organisations. The certification bodies, PGS organisers, labelling organisations and Inspection bodies are listed here as an online directory. For more information see www.organicstandard.com and www.organicstandard.com/component/content/article/153-ocd-info/2427-organic-certification-directory-2011-is-out

Eighty-five countries have a domestic certification body; however, this does not mean that producers in the other countries are without certification services. Many of the listed certification bodies also operate outside their home country. Only a few countries in the world do not have a certification body operating within its borders. Generally, certification bodies operating internationally are based in a developed country and offer their certification services in developing countries. Very few operate in several developed countries. For example, some EU-based certification bodies are accredited to the US National Organic Program (NOP), but only the Soil Association and Naturland offer their services in the United States. A handful of certifiers work on several or all continents.

Most of Africa and large parts of Asia still lack local service providers. There are only 19 certification bodies in Africa (in Cameroon, Egypt, Kenya, Senegal, South Africa, Tanzania, Tunisia, Uganda, and Zambia). Asia has 179 certification bodies, most of them based in South Korea, China, India, and Japan. The Caribbean has very few certification bodies. The Pacific has certification bodies in Australia and New Zealand only, and these operate in most of the countries in the region.

Since 2003, the number of certification bodies has risen sharply in Asia and Europe. The number increased in Latin America as well, but the number has been relatively stable in Africa and the Pacific region. In the US, the introduction of the National Organic Program (NOP) initially caused a fairly drastic reduction in the number of certification bodies, after which the situation stabilised. In some countries, notably China, Japan, and South Korea, the introduction of a regulation has led to a growth in the number of certification bodies. Japan reports a steady number of around sixty certifiers since 2008.

In 2011, a rise of certification bodies was noted in Asia, and a few new countries in Asia now have local certifiers. India now has 22 certification bodies, up from 17 in 2010. Japan, Turkey, and Israel have two more certification bodies each. Cambodia also has a new certifier as well as Palestine. Africa has seven new certification bodies. Cameroon has a new certifier and Tunisia has four new certifiers.

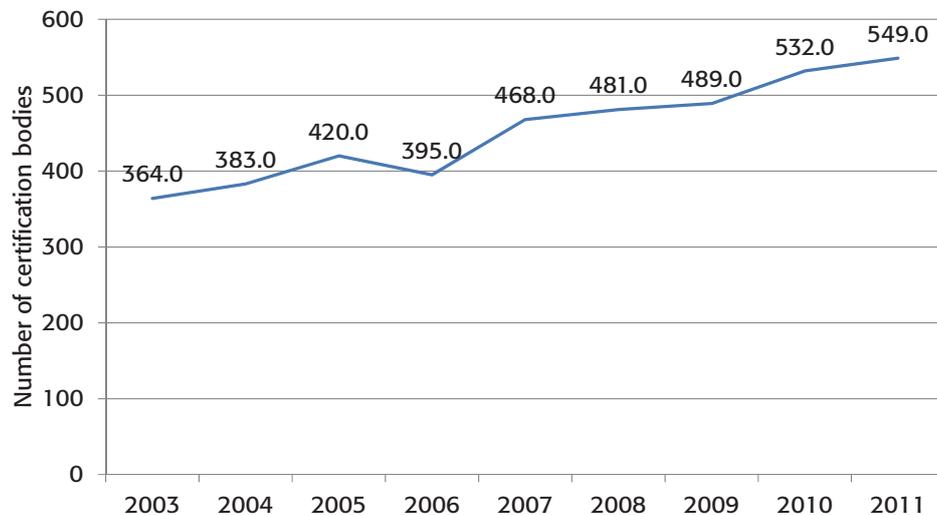


Figure 45: Certification bodies: Development 2003–2011

Source: Grolink, *The Organic Certification Directory 2012*

Table 39: Certification bodies: Development per region 2003–2011

	2003	2004	2005	2006	2007	2008	2009	2010	2011
Africa	7	9	7	8	8	10	10	12	19
Asia	83	91	117	93	147	157	164	165	179
Europe	130	142	157	160	172	177	180	214	213
Latin America & Caribbean	33	33	43	43	47	48	47	51	51
North America	101	97	85	80	83	78	76	78	74
Oceania	10	11	11	11	11	11	12	12	13
Total	364	383	420	395	468	481	489	532	549

Source: Grolink, *The Organic Certification Directory 2012*

Number of operators and farmers

Certification bodies were asked for information about the number of operators they certify. Two hundred and thirty-four responded, representing a total of 200'251 operators.

Two hundred and three certification bodies gave an answer regarding the number of farmers. In total, they certified 1'241'073 farms, with BCS (Germany) topping the list, certifying 342'994 farms. IMO's head office (Switzerland) reports certifying more than 120'000 farms. Many of the farmers are certified in group certification for smallholders. India has the highest number of organic farms in the world. Naturland (Germany) reports 50'000 farms, and Certimex (Mexico) nearly 30'000 farms. It should be noted that a farm can be certified twice. For example, Naturland does not have its own inspectors and uses other organisations, such as IMO, to inspect their farmers to Naturland standards. IMO may then certify the same farmer for EU or NOP approval and, therefore, the same farmer will be included in Naturland and IMO's figures and counts as two in the statistics. Nevertheless, the worldwide number of certified farms is likely to be in the range of two to three million or possibly more, as information is lacking from many important countries and more than half of the certification bodies.

Turnover

Most organisations are still not transparent about their turnover. Only eighty-two organisations responded to the question. Of these, many report figures in the range of 100'000 to 500'000 euros. Organisations reporting a turnover of 2 million euros or more are Ecocert (France), CCPB ltd (Italy), Suolo e Salute s.r.l. (Italy), CCOF Certification Services (USA), DIO Certification & Inspection Organization of Organic Products (Greece), Stichting Skal (The Netherlands), Debio (Norway), Istituto per la certificazione Etica e Ambientale (ICEA, Italy), bio.inspecta AG (Switzerland), Ecocert SA (International Department), Qualité-France SA, BIO HELLAS SA Inspection Institute of Organic Products (Greece).

When comparing reported turnover and number of operators certified, one could draw the conclusion that many of the certifiers generate income from other activities than certification. The global turnover in organic certification is clearly above 200 million euros, but it could be double this or more. A turnover of 400 million euros would represent approximately one percent of the estimated market value, or stated otherwise, 200 euros per farmer.

Starting date

Of the 339 that responded to the question concerning the starting date of their organization, only 14 started before 1985; more than half of them started in the decade between 1995 and 2004.

Table 40: Certification bodies: Start of operation of organic certifiers

Year	Share of certification bodies by time period
2005-2011	18%
1995-2004	54%
1985-1994	24%
Before 1985	4%

Source: Grolink, *The Organic Certification Directory 2012*

Approvals

Worldwide, there are six significant accreditation schemes: IFOAM¹, Japan², ISO 65³, EU⁴, USA⁵, and Canada.⁶ Only nine organizations, three Italian and two from Argentina, Australia, and New Zealand respectively, reported all six approvals. The EU represented the biggest increase in approval status with an increase from 251 in 2010 to 297 approved bodies in 2011. The majority of imports into the EU come through certification granted through the import authorizations. The number of organizations approved under the Japanese Organic Standard decreased by one. The US system has 129 approved bodies, of which 79 are outside the United States. The first African NOP approved certification body is from Egypt.

IFOAM has lost two accredited certification bodies, one in Hungary and one in Brazil. They are Biokontroll Hungária Nonprofit Kft., and TECPAR CERT from Brazil.

One hundred twenty-seven certification bodies claim to have their own standard.

The Organic Certification Directory also list Participatory Guarantee Systems (PGS), which total 25 schemes worldwide. The directory has also started listing Private Labelling Organisations and companies offering Organic Inspection Services. The three lists are not included in the statistics of approvals and certification bodies.

¹ For information on the IFOAM Accreditation Programme see http://www.ifoam.org/about_ifoam/standards/accreditation.html

² For information on the Standards for organic plants and organic processed foods of plant origin of the Japanese Agricultural Standard (JAS) see <http://www.maff.go.jp/e/jas/specific/organic.html>

³ For information on the ISO/IEC Guide 65:1996 -General requirements for bodies operating product certification systems- see http://www.iso.org/iso/catalogue_detail.htm?csnumber=26796

⁴ Information on the EU regulation on organic agriculture is available at the website of the European Commission at http://ec.europa.eu/agriculture/organic/eu-policy/legislation_en

⁵ Information on the United States' National Organic Programme is available at http://www.usda.gov/wps/portal/usda/usdahome?navid=ORGANIC_CERTIFICATIO

⁶ Information on the Canadian Organic Product Regulations (2009) is available at the website of Canada Gazette at <http://canadagazette.gc.ca/rp-pr/p2/2009/2009-06-24/html/sor-dors176-eng.html>

Table 41: Certification bodies: Development of the types of approval 2003–2011

	IFOAM	Japan	ISO 65	EU	Canada	USA
2003	26	81	74	112		106
2004	30	95	96	132		112
2005	31	100	113	143		115
2006	32	64	129	160		112
2007	36	63	133	171		125
2008	37	98	157	179		124
2009	37	99	166	182		125
2010	32	100	168	251		128
2011	30	99	172	297	107	129

Source: Grolink, The Organic Certification Directory 2012

Further information

The Organic Certification Directory will be published in February 2012 as a PDF and online. More information can be found at www.organicstandard.com/directory.

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Overview of Participatory Guarantee Systems in 2011

FLÁVIA CASTRO¹

Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks and knowledge exchange (IFOAM definition, 2008).

IFOAM is the only organization compiling global data about PGS. IFOAM's efforts to compile comprehensive data on PGS worldwide have started recently and are still under way; therefore, the data² provided here is not exhaustive but can be considered a fair approximation of the situation in 2011.

Some PGS initiatives, such as Nature et Progrès (the French federation grouping organic producers, processors and consumers created in 1972) are nearly as old as the first organic agriculture associations. Since 1998, many PGS initiatives were launched with a major peak occurring in 2005.³ A similar peak appeared in 2010, indicating growing awareness of the PGS concept and increasing acceptance within national and regional legal frameworks for organic production.

Estimations show that about 40 PGS initiatives have been established worldwide and that more than 20 are currently under development. Latin America and India are the leaders in terms of the number of farmers certified through PGS as well as of the level of recognition achieved towards the national governments.

PGS recognition in national and regional legal frameworks

In January 2011, French Polynesia became the second country to recognize Participatory Guarantee Systems as possible "control bodies" at the same level as third party certifiers, with the publication of law LP-2011-1.⁴ Brazil was the first country to recognize PGS as a certification organization at the same level as third party certifiers, with a legal framework for organic production that was fully implemented in January 2010.⁵

¹ Project Coordinator at the International Federation of Organic Agriculture Movements - IFOAM. Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, f.castro@ifoam.org, www.ifoam.org

² Some of the organic producers involved in PGS may be included in the overall national organic agriculture statistics presented in this book. This might be the case, for example, in the following situations:

- If they are linked to, or recognized by, a national organic agriculture association that compiles national data on the organic sector (e.g., in New Zealand).

- When some of the producers involved in PGS also have a separate third party certification and are, therefore, counted in the data reported by certification bodies (this is, for example, the case in France, where 50 percent of the PGS-certified farmers have double certification).

- When entire PGS groups are connected to the third party certification system by being audited and certified as a group (where the PGS manages an Internal Control System). In this case, they would also be counted in the data provided by certification bodies (this is, for example, the case for a few PGS in Latin America).

However, in several cases, organic producers certified through PGS are not yet included in the national organic agriculture statistics because they are not sufficiently recognized by other institutions and they might even be denied the right to call themselves "organic" according to the regulation in place.

³ In 2005 IFOAM and MAELA (The Latin America Agro-Ecology Movement) organized the first International Workshop on Alternative Certification in Torres, Brazil.

⁴ The Global PGS Newsletter, February 2011, n.4, V.2, p.2.

⁵ The Global PGS Newsletter, January 2011, n.3, V.2, p.2.

In other Latin American countries, several national organic laws recognize PGS, however, some restrictions apply. In fact, Latin America is the area of the world with the highest level of PGS awareness and recognition for PGS among governmental bodies. Some examples are: Bolivia, Costa Rica, El Salvador, Mexico, Paraguay and Uruguay. In Chile, the law does not recognize PGS, but does allow alternative certification systems to be used for direct sales by small farmers, provided that these schemes (which can in practice be PGS schemes) are supervised and approved by the National Agriculture and Livestock Service.

The Indian legislation on organic farming does not recognize PGS, but since the domestic market in India currently has a voluntary organic regulation¹, organic claims can be made without certification or with PGS certification only. A national PGS council was formed in India by the private sector (NGOs) in 2007, under the initial support of an FAO project.

Regional examples of PGS recognition already exist, such as in the Pacific Community and the East African Community, while others are currently under discussion.

The Pacific Community is a regional community encompassing 26 island countries and territories. The community has worked on its organic certification system in the context of FAO-supported projects, and has developed a regional organic standard, legal framework and logo. To use the regional logo, PGS schemes must be approved by the Pacific Organic and Ethical Trade Community (POETCom), a body that is housed in the Secretariat of the Pacific Community, an inter-governmental body. The East African Community has also adopted a regional organic standard and agreed on a common approach to manage the use of a regional organic logo. To use the regional logo, PGS schemes must have been approved by their respective national organic movement association.

The EU, the USA and Japan do not recognize PGS; hence, it is forbidden for PGS-certified producers to sell their products as organic unless they obtain additional third party certification.

PGS worldwide in figures

- It is estimated that more than 27'000 small operators are currently involved in PGS worldwide. This includes mostly small farmers and a few small processors.
- The leading countries are the Philippines, with about 10'500 producers involved and 850 certified, followed by India, with more than 4'500 producers involved, of which 2'512 are certified, and Brazil, with over 3'600 producers involved and at least 2'758 producers² certified.
- Asia is the continent with the highest number of producers involved in PGS with over 15'000 and more than 3'350 certified producers.
- Latin America is the continent with the second highest number of producers involved (over 6'500), and also where the concept of PGS is most widely spread. The total number of producers certified in Latin America is at least 3'678.

¹ The Global PGS Newsletter, July-August 2011, n.9, V.2, p.2.

² Some PGS initiatives did not provide detailed data distinguishing between "producers involved" and "producers certified". The number of producers certified per country provided here is based only on detailed data distinguishing between "producers involved" and "producers certified". This information was provided directly by PGS initiatives in the respective countries on November 1, 2011. The number of certified producers might be higher than the figures presented here.

- In North America, over 1'100 producers are involved in PGS in the USA and at least 860 producers are certified. In Canada, at least 16 producers are certified.
- Notwithstanding the unfavorable legal framework, PGS initiatives exist in Europe and involve more than 950 producers. Most of them are based in France, where at least 830 producers are also certified.
- In Africa it is estimated that about 3'000 farmers are involved in PGS. Currently, figures related to PGS certified producers are available for South Africa and Namibia, 140 and 7 respectively.
- More than 240 producers are involved in PGS in Oceania. There are about 150 PGS certified producers, mostly based in New Zealand.

The complete PGS data set is available on the IFOAM Online Global PGS Database and regularly updated.

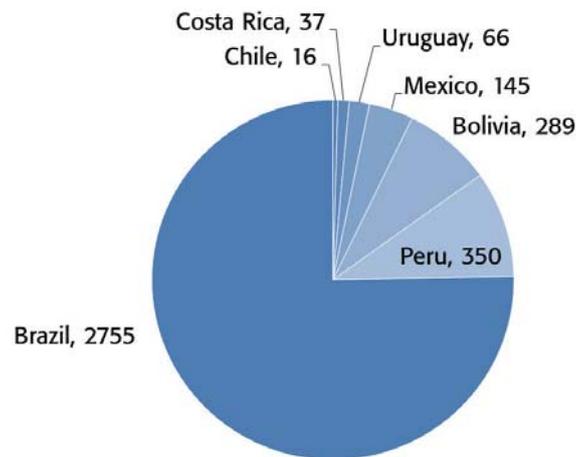
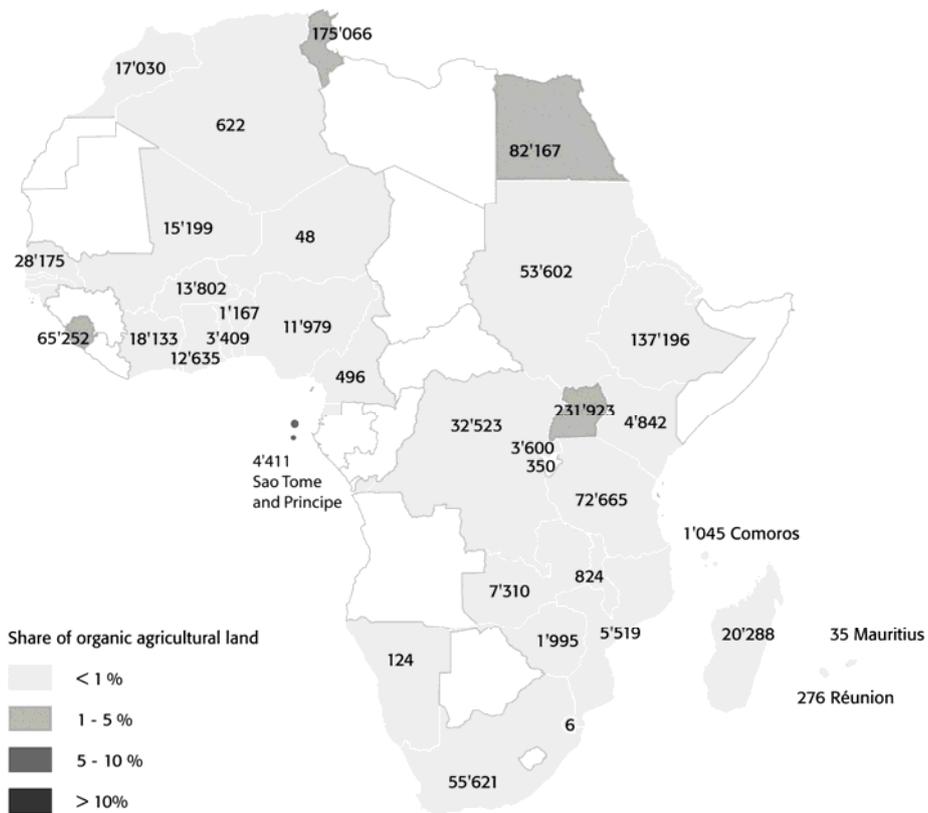


Figure 46: PGS certified producers in Latin America, per country

Online references:

- The IFOAM Participatory Guarantee Systems website: http://www.ifoam.org/about_ifoam/standards/pgs.html
- The IFOAM Online Global PGS Database: a comprehensive database accessible from the IFOAM PGS website.
- The Global PGS Newsletter: a free electronic monthly publication. To subscribe, please contact pgs@ifoam.org.

Africa



Map 2: Organic agricultural land in the countries of Africa 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, governments and the Mediterranean Organic Agriculture Network (MOAN). For detailed data sources see annex, page 307.

Organic Farming in Africa: Latest Developments

HERVÉ BOUAGNIMBECK¹

The development of organic agriculture in Africa is entering a new phase. Given its affordability and the valuable tool-kit provided by organic agriculture, there is a growing recognition among policy makers that organic agriculture has a significant role to play in addressing the pressing problems of food insecurity, poverty, and climate change in Africa.

In the last edition of this publication, we stated the need for organic agriculture to be systematically integrated into multiple African agriculture and rural development policies and action plans. We are pleased to report that significant breakthroughs were achieved in 2011; especially the African Union's (AU) decision to support organic farming and their subsequent leadership in promoting and further developing frameworks/strategies for organic farming policies, the African Ecological Organic Agriculture Initiative and the IFOAM-African Union Conference.

IFOAM is working with the African Union, the African organic sector, and other agencies in the framework of its "*Organic for Africa Initiative*" to help coordinate activities, increase awareness of the multiple benefits of organic agriculture and facilitate the integration of organic agriculture solutions and opportunities into the core of African policies and agricultural development agenda.

The African Union Executive Council's decision on organic farming²

The Executive Council of the African Union adopted a decision on organic farming last January at its Eighteenth Ordinary Session. In particular, the decision requests the African Union Commission (AUC) and its New Partnership for Africa's Development (NEPAD) Planning and Coordinating Agency (NPCA) to initiate and provide guidance for an African Union-led coalition of international partners on the establishment of an African organic farming platform based on available best practices; and to provide guidance in support of the development of sustainable organic farming systems and improve seed quality.

This African Union's recognition of the importance of organic agriculture is an important step for realizing the multifunctional benefits of organic agriculture and growing the capacity for African governments to develop sustainable, resilient and productive farming on the continent.

The African Ecological Organic Agriculture Initiative and Action Plan

In response to the African Union Executive Council's decision on organic farming, the AUC joined with African ecological and organic agriculture stakeholders and international strategic partners such as IFOAM to develop an African Ecological Organic Agriculture Action Plan. The Action Plan, developed in May 2011 in Thika, Kenya, aims to mainstream

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² The Decision on Organic Farming (EX.CL/Dec.621 (XVIII)) was adopted by the Executive Council of the African Union at its Eighteenth Ordinary Session in January 2011. Available at: http://www.au.int/en/sites/default/files/COUNCIL_EN_24_28_JANUARY_2011_%20EXECUTIVE_COUNCIL_EIGHTEENTH_ORDINARY_SESSION.pdf

“Ecological Organic Agriculture” into national agricultural production systems by 2020. It is aligned with the goals of the African Union’s decision on organic farming and will, therefore, aim to assist its successful implementation. Pillars for the action plan are:

- Research, training and extension
- Information and communication
- Value chain and market development
- Networking and partnerships
- Supportive policy and programs
- Institutional capacity development

An estimated budget of 44 million euros would be needed to implement the Action Plan over the next five years.

The initiative will be implemented on a pilot basis in six countries: Kenya, Tanzania, Uganda, and Ethiopia in East Africa; Nigeria in West Africa; and Zambia in South Africa. Provisions have been made for expanding to other countries using lessons learnt. The pilot phase is funded by the Swedish Society for Nature Conservation (SSNC) and coordinated on an interim basis by PELUM Kenya.¹

The African Ecological Organic Agriculture initiative is supported by a steering committee chaired by a representative of the African Union Commission (AUC). Members of the Steering Committee include:

- Dr. Sarah Olembo, African Union Commission, Ethiopia
- Sue Edwards, Institute for Sustainable Development (ISD), Ethiopia
- Zachary Makanya, Participatory Ecological Land Use Management, PELUM Kenya
- Musa Muwanga (NOGAMU), Uganda
- Herve Bouagnimbeck, International Federation of Organic Agriculture Movements (IFOAM), Germany
- Dr. Charles Sseyewa, Uganda Martyrs University, Uganda
- Ngugi Mutura, Sustainable Agriculture Community Development Programmes (SACDEP), Kenya
- Dr. Olugbenga Adeoluwa, University of Ibadan and *Nigerian Organic Agriculture Network (NOAN)*, Nigeria
- Dr. David Amudavi, Biovision Foundation, Kenya
- Munshimbwe Chitalu, Organic Producers and Processors Association of Zambia, OPPAZ, Zambia

¹ The Participatory Ecological Land Use Management (PELUM) Association is a network of Civil Society Organizations / NGOs working with small-scale farmers in East, central and Southern Africa. The Association membership has grown from 25 pioneer members (in 1995) to over 230 members in 2010. PELUM- Kenya is the Kenyan country chapter of the PELUM Association and has a membership of 38 member organizations. More information is available at <http://pelum.net/>

Workshop on organic farming: Building strategies for Africa—adding value through organic agriculture

In July 2011, in Brussels, Belgium, the European Commission and the African Union Commission (AUC) organized a kick-off workshop¹ with the aim of contributing to the strategy on organic farming development in Africa.

The workshop brought together more than 80 high-level experts in the field of organic farming from across sub-Saharan Africa and the European Union and addressed organic requirements, the constraints on the development of organic farming and best practices from the European Union and from Africa.

The workshop had a number of important achievements, including:

- Moving forward on the Draft Ecological Organic Agriculture Action Plan for Africa.
- Mainstreaming organic farming into African agricultural and rural development policies and programs. This can add value to organic products and allows farmers to move up the value chain, e.g. by developing local branding of products, contributing to the education of the community and linking farming to tourism (e.g. ecotourism).
- Broad agreement by the participants that the African Union should take the lead in promoting and further developing frameworks/strategies for organic farming policies throughout Africa.

Ecological Organic Agriculture conference, unleashing the potential of organic farming in Africa

In November 2011, IFOAM successfully organized—together with the African Union, the Kenyan Organic Agriculture Network (KOAN), and COLABORA—the international conference “Ecological Organic Agriculture: The Alternative for Africa”² at the Headquarters of the United Nations Environment Programme (UNEP) in Nairobi, Kenya. Some 200 participants from 20 countries throughout the world attended the conference, including representatives from farmers’ organizations, governments, inter-governmental institutions, UN agencies, national and international NGOs, the private sector, universities, and research institutions.

The conference had a number of important outcomes:

- The African Ecological Organic Agriculture Initiative and Action Plan were embraced by stakeholders as an important step towards mainstreaming ecological organic agriculture into national agricultural production systems in Africa.
- The Second African Organic Agriculture Conference to be held from May 2 to 4, 2012, in Lusaka, Zambia, was presented and an international planning committee was formed.
- UNEP expressed more support for ecological organic agriculture, not only by hosting the conference within its headquarters, but also by encouraging more stakeholders to participate in its promotion in Africa.

¹ The workshop report is available at: http://ec.europa.eu/agriculture/events/2011/organic-africa-2011/conclusions_en.pdf

² Presentations, the conference declaration draft and other documents are available at: http://www.ifoam.org/events/ifoam_conferences/Organic_Alternative_for_Africa_2011.html

- The late Professor Wangari Maathai was honored for her outstanding achievements with the “One World Very Impacting Person – Award”, which was received by her daughter Wanjira Maathai.
- Several highly convincing examples of the enormous development and progress organic agriculture can bring—especially to resource-poor farmers and their families – were presented from across the continent, thus building awareness of accessible, productive, and resilient organic farming systems and inspiring participants.
- Participants agreed that Africa urgently needs the Ecological Organic Alternative to help overcome the pressing challenges of food insecurity, poverty and climate change.
- The African Organic Agriculture Manual was launched (see below).
- A conference declaration was adopted and will be used to continue lobbying a comprehensive range of stakeholders capable of unlocking the potential that ecological and people-centered systems offer Africa.

African Organic Agriculture Training Manual

In order to make use of the multifunctional benefits provided by organic agriculture, projects were initiated to develop capacities and knowledge in the African continent. With funding of the Bill & Melinda Gates Foundation and the Syngenta Foundation for Sustainable Agriculture, the Research Institute of Organic Agriculture (FiBL) has developed training materials in collaboration with IFOAM and African national organic agriculture movements to enhance the adoption of organic farming practices by African smallholder farmers.

The materials, including a manual for trainers, booklets and factsheets for farmers, videos and posters, are comprehensive, easy to understand, and extensively illustrated. The materials are available for download at www.organic-africa.net. In 2011, FiBL started a field program to validate, refine, and disseminate the materials. FiBL invites African training organizations to validate and implement the materials in an effort to continuously develop the manual and make best practices available. Information on how to contribute to the validation is available at www.organic-africa.net, link “Contribute to the validation process!”

Agriculture and organic farming take centre stage in Durban

The United Nations Climate Change Conference¹ was in Africa in December 2011. Given that agriculture is the mainstay of most African economies, it was a hot topic in Durban, and the African Union and the government of South Africa ensured that African issues dominated the talks.

A major outcome for IFOAM’s advocacy work was the call by the President of South Africa, Jacob Zuma,² issued at the FAO, World Bank, African Union, and World Food Program’s High Level Side Event on Climate Smart Agriculture, for governments to “promote organic farming systems”. President Zuma stated that, “Organic agriculture has a smaller footprint on the natural resource base and the health of agricultural workers than conventional agriculture”, and that “The use of organic methods of farming by small producers in

¹ Information on the United Nations Climate Change Conference, Durban 2011, is available at http://unfccc.int/meetings/durban_nov_2011/meeting/6245.php.

² The full address by President Jacob Zuma is available at: <http://www.thepresidency.gov.za/pebble.asp?reid=5431>

developing countries can lead to an increase in crop yields and thus enhance food security among the poor". The statement had added significance given the presence of Kofi Annan (Chairman of the Alliance for a Green Revolution for Africa) and the Prime Minister of Ethiopia, Meles Zenawi.

With the support of local members Professor Raymond Auerbach of the Rainman Landcare Foundation and Sue Edwards of the Institute for Sustainable Development in Ethiopia, IFOAM was able to significantly strengthen the recognition of organic agriculture within the international community through successful joint side events with the African Union, World Food Program and the Government of Malawi.

The extent of organic agriculture in Africa

The lack of an official organic agriculture data collection in many African countries makes it difficult to obtain reliable information on the extent of organic production. With the exception of a few countries such as Tunisia and Egypt where the government collates the data, data related to organic agriculture in Africa is collected by private sector organizations, such as national organic umbrella organizations and certification bodies. Nevertheless, the availability and quality of information is improving in most countries.

In global terms, Africa accounts for 2.8 percent of total certified organic land. Table 44 shows the figures for individual African countries. According to these figures, 38 African countries are engaged in certified organic agriculture (data end 2010). Currently (data end 2010), slightly more than 1 million hectares of land is certified organic. This land is managed by at least 530'000 farms. The agricultural land is mainly used for permanent crops, principally cash crops such as coffee, olives, and cocoa. The leading country in terms of organically managed agricultural land is Uganda with 228'419 hectares. However, when organically managed land is measured as a percentage of each country's agricultural area, Sao Tome and Prince rank highest with 7.9 percent. Uganda (188'625 farms) has the largest number of organic farms, followed by Ethiopia (123'062 farms) and Tanzania (85'366 farms).

Organic wild collection areas and bee pastures

In addition to the one million hectares of certified organic agricultural land, 16.4 million hectares of land are organic beekeeping, forest, and wild collection areas.

The largest beekeeping areas are in Cameroon (6 million hectares). The largest wild collection areas are in Namibia (3.0 million hectares) and Morocco (618'000 hectares). Medicinal plants like devil's claw (*Harpagophytum procumbens*) play the most important role in wild collection.

Outlook

Very important steps have been reached in 2011 towards realizing the multifunctional benefits of organic agriculture and growing the capacity for African governments to develop sustainable, resilient and productive farming on the continent. These outcomes are the fruit of continuous lobbying efforts of the African organic initiatives and their international partners. Yet, these efforts are far from being finished.

There is undoubtedly room for substantial increase in organic production in Africa so that millions of smallholder farmers and their families can move out of poverty and hunger and

enjoy a better life. In addition to expanding international market access, there is a need to develop local and regional markets for organic produce in Africa. Key elements to achieving long-term sustainability of organic production systems in Africa include: capacity-building in affordable and resilient organic practices, increased consumer awareness, cooperation among stakeholders and producers in the supply chain, increased investments in research on organic agriculture, and the development of conformity assessment mechanisms for local marketing that are accessible for smallholders, such as Participatory Guarantee Systems (PGS), as demanded by the African Ecological Organic Agriculture Initiative and Action Plan.

The second African Organic Conference to be held in Lusaka, Zambia from May 2 to 4, 2012 will provide a key platform to mobilize support for organic agriculture and take the necessary actions to bring the organic agenda to new heights in Africa.

Benin: Country Report

LAURENT GLIN¹

Recent developments

Organic agriculture originated in the mid-1990s in Benin, and it centered on cotton farming systems at that time. In fact, conventional cotton farming has been and is still the major vehicle of chemical pesticides access and use, causing a lot of environmental and health disorders (Glin et al. 2006; Vodouhe et al. 2001). Thus, pioneers of organic farming targeted the cotton system and tried to develop alternative technologies for pest and soil fertility management as well as alternative marketing channels.

However, over the past five years the organic agriculture sector in Benin witnessed some important structural changes both quantitatively and qualitatively. First, the organic cotton chain underwent a progressive transformation from an experimental, small-scale and donor-dependent initiative towards a market-oriented, large-scale and self-financing transnational commodity network (Glin et al., in press). Secondly, the organic sector is experiencing increasing diversification of products and stakeholders (to a lesser extent). Currently, apart from cotton, organic certified commodities from Benin include pineapples, shea nuts, vegetables, and several fruits.

History

Organic agriculture (cotton) was initiated in 1996 through the bilateral Sustainable Development Agreement (SDA) between the governments of the Kingdom of the Netherlands and the Republic of Benin. The Sustainable Development Agreement “was about finding a new way for countries to tackle their common problems of unsustainable development” (Verhagen et al. 2003). Thus, a transnational organic cotton network was set up, aiming at developing a sustainable mode of production of cotton in Benin while satisfying the increasing consumer demand in organic/sustainable fiber and textiles in the Netherlands. Locally, the newly created national NGO, the Beninese Organization for the Promotion of Organic Agriculture (OBEPAB)² became the local agency for implementing a sustainable cotton supply chain (Glin et al. in press). Transnational environmental NGOs (Pesticides Trust – now Pesticide Action Network UK (PAN-UK), Agro Eco, Textile Exchanges, etc.) have been instrumental in the further transformation and development of this organic cotton chain. In 2008, Helvetas-Benin in partnership with the German Society for International Cooperation (GIZ) and the NGO Union of Village Associations for the Management of Wildlife Reserves (U-AVIGREF)³ started a new organic cotton project in the surrounding areas of the Pendjari biosphere reserve in Northwest Benin. The rationale behind this is to protect the reserve from pesticide contamination while generating sustainable income to local communities. Currently, more than 500 metric tons of certified organic cotton seed are produced annually for export to the European Union and the United States.

¹ Laurent Glin PhD Researcher, Wageningen University, E-mail glinlaurent@yahoo.fr, Laurent.glin@wur.nl

² Organisation Béninoise pour la Promotion de l'Agriculture Biologique (BEPAB), www.obepab.org

³ Union des Associations Villageoises de Gestion des Réserves de Faune

Parallel to this, as already mentioned, the production of several other commodities was introduced, and these products are regularly certified (see Table 42).

Table 42: Benin: Key organic crops by area, production volumes, and numbers of producers

Key crops	Area [ha]	Production [mt]	Producers	Organization	Certification agency
Cotton	817	445	767	OBEPAB	Ecocert International
Cotton	277	100	1031	Helvetas	Ecocert International
Pineapples	60	3,603	194	Helvetas	Ecocert International
Fruits	7.67	77.19	-	Fondation Espace Afrique/CIEVRA	BCS Oko-Garantie GmbH
Vegetables	1.9	1	-	Fondation Espace Afrique/CIEVRA	BCS Oko-Garantie GmbH

Source: OBEPAB, Helvetas, Fondation Espace Afrique/CIEVRA, Edon et al., 2011

Key institutions/organizations

Despite the increasing number of commercial developments, environmental Non-Governmental Organizations (NGOs), both national and international, are the principal driving forces of the organic sector in Benin; the public sector is still lagging behind. Table 43 lists the key institutions.

Market and trade

While organic cotton fiber is almost destined for export to the European Union and the United States, most of the other organic commodities are traded locally either because of the small size of operations, or lack of market access or objective of production (for instance, it could be only driven by research and for learning purposes).

Legislation

There is no national regulation on organic agriculture in Benin. Organic farming and processing in Benin mostly follows the EU regulation 834/2007 on organic farming. Depending on buyers' demand, other certification standards are also applied such as the United States national organic standards—National Organic Program (NOP)—and the Japanese organic standard—Japanese Agricultural Standard (JAS).

Government support and development cooperation

At the initial phase of the organic cotton initiative, government support was a key factor through the financial mechanism of the Sustainable Development Agreement. This support ended in 2004. Overall, government support is still lacking and the sector relies mostly on NGO networks, private stakeholders, and development funds.

Table 43: Benin: Key organizations active in organic agriculture and related fields

Organizations	Categories	Commodities	Certification schemes	Level of intervention	Contacts
OBEPAB (Organisation Béninoise pour la Promotion de l'Agriculture Biologique)	National NGO	Promotion of organically certified cotton and other organic, non-certified commodities including pineapple, peanut, cowpea, maize, and cashew.	EU standard, occasionally NOP and JAS standards Certification (of cotton) by ECOCERT	National level	OBEPAB, 02 BP 8033 Cotonou Tel. +229 21 35 14 97, E-mail obepab@intnet.bj, Website www.obepab.org
Helvetas Benin (Association Suisse pour la coopération internationale)	International organization	Promotion of organic and fair-trade cotton and pineapple : Technical and organizational support in production and marketing Advocacy	EU standards Organic certification by ECOCERT Fair Trade by FLO	National level: Cotton in north Benin Pineapple in south	Helvetas Benin, Association suisse pour la coopération internationale Lot 21 A, Cadjehou 08 BP 1105 CTP Cotonou, Benin, Tel. +229 21 30 21 99, Fax +229 21 30 21 65 E-mail benin@helvetas.org Website www.benin.helvetas.org
Textile Exchange (formerly, Organic Exchange)	International NGO	Technical and marketing support to organic/ sustainable cotton industry	-	Global	Contact person : SilvèreTovignan, BP 1475 Abomey-Calavi, Bénin, Tel. +229 95 45 58 92/ 97 28 11 38, Website : www.organicexchange.org
CIEVRA (Centre International d'Expérimentation et de Valorisation des Ressources Africaines/Fondation Espace Afrique)	Private organization	Capacity building and research institution Vegetable and fruits (pawpaw, mangoes, plantains, etc.)	EU organic standard, certification by BCS Öko-Garantie	District of Zè, department of Atlantique, south of Benin	P.O Box 72, 1211 Geneva 21, Switzerland, Tel. +41 22 741 14 06, Fax +41 22 741 14 10, E-mail marysedossou@f-espaceafrique.com, Website: www.f-espaceafrique.com
Karethic Benin SARL	Private company	Development and marketing of organic shea products	Organic and fair-trade certification by ECOCERT	North Benin	06 BP 3895, Cotonou, Tel. +229 21 03 57 42, Website ww.karethic.com
CSFT (Centre de séchage des Fruits Tropicaux)	Private company	Processing and export of fair trade pineapple products (dried, juice)	Max Havelaar, Fair trade Labelling Organizations	South and centre Benin	03 BP 42, Abomey / Benin, Tel. +229 22 50 10 88, E-mail csftatbd@intnet.bj
IRA (Initiative pour la Relance de l'Ananas)	Private company	Production, processing, and marketing of non-certified organic pineapple juice	Non-certified organic	District of Allada, department of Atlantique, south Benin	BP 178, Allada, Tel. +229 95 42 45 37
Centre Songhai	Private organization	Capacity building and research organization Production,	Non-certified organic	South, center and north Benin	01 BP 597, Ouando, Porto-Novo, Tel. +22920246881, Fax +22920247250, Website http://www.songhai.org

		processing, and domestic market trade of non-certified products (vegetable, fruits, animals)			
IITA-Benin	International research center	Biological pest control with a focus on cowpea and vegetable	-	National and regional	IITA – Benin, BP 08-0932, Cotonou, Telex: 5329 ITABEN, Tel. +229 21 350188, GSM +229 95 86 94 45/ 95 86 94 46/ 95 95 12 39, E-mail IITA-Benin@cgiar.org
DCAM/BETHESDA	National NGO	Production and sale of compost Capacity building in organic agriculture	-	National	03 BP: 4270, Jéricho, Cotonou, Tel. +22 21 32 11 29/ 21 32 38 59, Fax +229 21 32 75 49, E-mail bethesda@intnet.bj; dcambethesda@yahoo.fr
REDAD (Réseau de Développement d'Agriculture Durable)	National network	Capacity building and organizational support in sustainable agriculture	-	National	04 BP 0670 Cotonou, Tel. +229 21 36 24 91/ 95 05 25 23, Fax +229 21 36 24 91, E-mail redadbenin@yahoo.fr

Research, advice, and training

Organic farming involves a broader perspective on cultivated plants, including their interrelationship in the ecosystem. This requires a change in farmer attitude and behavior, and also new farming knowledge, skills, and technologies. Therefore, it is crucial that farmer knowledge is improved and that locally available resources are used. Organic farming relies on informal experiments and participatory technology development. Here, farmer organizations play an important role. Furthermore, the support from NGOs and research centers is important.

Outlook

The future of the organic sector in Benin will depend on:

- the strengthening of the linkage between production and trade;
- further commitment of the private sector;
- strengthening the position and contribution of research in pest and soil fertility management through the mobilization of relevant partnerships;
- increasing governmental body and consumer awareness about organic farming.

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Organic Agriculture in Ethiopia: Current Status and Perspectives

ADDISU ALEMAYEHU¹

History

Ethiopia is a land-locked country with an area of 1'130'000 km², which occupies major part of Northeast Africa, often referred to as the Horn of Africa. In 2005, the population was estimated at 75 million inhabitants.² Ethiopia is one of the major biodiversity, particularly agro-biodiversity, hotspots in the world (Teklu, 2005 and Mulugeta 2004). Agriculture is the mainstay of the economy contributing to 46 percent of the Gross Domestic Product (GDP),³ over 90 percent of exports, and 83 percent of employment (NBE 2008). Ethiopian agriculture is characterized by smallholder farmers that account for around 11 million farmers. On average, farms have less than one hectare of cultivated land. Mixed farming (livestock and crops) is a common practice in the highlands of Ethiopia, mostly under rain-fed conditions. Agroforestry is practiced in the tropical rain forest areas, and pastoralist/agro-pastoral communities depending on livestock production are found in the lower semi-arid and arid parts of the country.

NGOs and private companies introduced the concept and principle of organic agriculture in Ethiopian farming systems. The main driving forces for the development of organic agriculture as well as biofarming,⁴ agroforestry, sustainable farming, integrated pest management (IPM), ecological farming, conservation agriculture and home gardening were food security, natural resource conservation and better income. Certified organic agriculture was non-existent until the 1990s.

The first certified organic product was sesame, certified by Ecocert in 1996 and exported by a company called Manudura. Since then, the type and the volume of organic products produced and exported increased and expanded to include coffee, honey, beeswax, gums and resins.

Despite organic agriculture's potential to contribute to sustainable, economic development and natural resource conservation in the country, the first official study with basic data on organic production, marketing, standards and certification was completed only in 2008. In that year, the Ethiopian Association of Organic Agriculture (EAOA) carried out a baseline survey through the consultancy company Aco Ersha Promotion PLC. Since then, the data have been updated with the help of different donors. Addisu Alemayehu carried out the current report and data collection with the financial support of the Research Institute of Organic Agriculture (FiBL), covering the status of organic agriculture in Ethiopia in 2010.⁵

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Addisu Alemayehu is a founder and board member of the Ethiopian Association of Organic Agriculture (EAOA) and Assistant Research III at Tepi National Spice Research Centre (TNSRC).

² The official population census carried out in May 2005 gives a population of nearly 75 million.

³ Comprising 30% crop sector, 12.3% livestock and 4% forestry.

⁴ In Ethiopia this term is used for a concept similar to that of biodynamic farming.

⁵ Most of the figures and findings mentioned on this report are taken either directly or with slight modifications from a report of the author the identification of gaps and intervention needs of fairtrade and organic producer

Organic production data

Generally, the lack of recognized systems for data collection on organic agriculture and the prevalence of uncertified organic farms is an inherent weakness in terms of getting reliable information (FAO 2002). This situation is also true in Ethiopia. In order to improve the consistency and reliability of the data, the data were compiled and cross-checked based on the information collected from organic producer and exporter companies (12), sample smallholder farmers (52), certification companies (3) and the Ethiopian Customs and Revenue Authority. The survey also showed that there is a lack of documentation and transparency and that training and capacity building are needed at all levels.

In Ethiopia, there are certified, in-conversion and non-certified organic farms producing for export and local markets. Whereas certified farms produce for the export market, the non-certified farmers produce for the local market.

Currently (2010) Ethiopia has 136'436 hectares of certified organic land, managed by 123'062 certified organic smallholder farmers and three large processing companies. The land area is slightly lower than in 2008, but it increased by 36'492 hectares compared with 2009. On the other hand, the number of smallholder farmers is higher than ever before (see Figure 47, Figure 48).

In addition, there are 15' 356 smallholder farmers that produce pineapples, apples, cactus, corn, and mango. These products are supplied to a local Ethiopian food processing company called Ecopia PLC. It is the only company that pushes the organic domestic market development through PGS¹ and biodynamic agriculture. It sells its pineapple and mango juices, cosmetics, wine and cornflakes in leading supermarkets (such as Novis and Bambis) in Addis Ababa.

In addition, there are two new emerging companies converting to organic farming; one foreign (Panaacea International Agro Industry PLC) and one local company (Ethamco LLC). The former produces wheat and barley on 300 hectares of land, whereas the latter produces different vegetables on 180 hectares of land.

The total certified organic production was 79'231.18 metric tons in 2010. It has increased by 47 percent and 50 percent respectively, compared with 2008 and 2009. At the same time, the number of certified new cooperatives and members grew rapidly.

groups in Ethiopia for Bcad Consulting Management, carried out with the financial help of the International Trade Centre (ITC) and the Swiss State Secretariat for Economic Affairs (SECO) in June 2011.

¹PGS = Participatory Guarantee System:

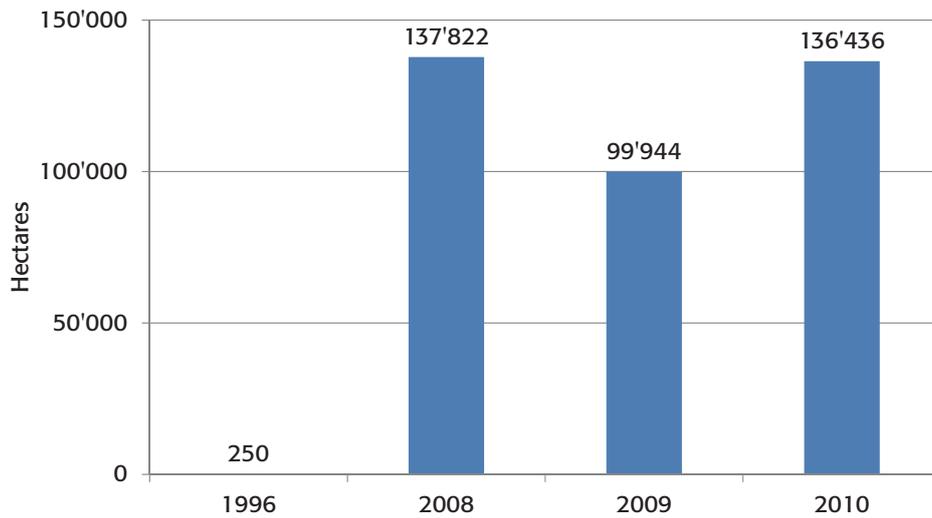


Figure 47: Ethiopia: Development of certified organic land 1996-2010

Source: Ethiopian Association of Organic Agriculture (EAOA) Custom and Revenue Authority

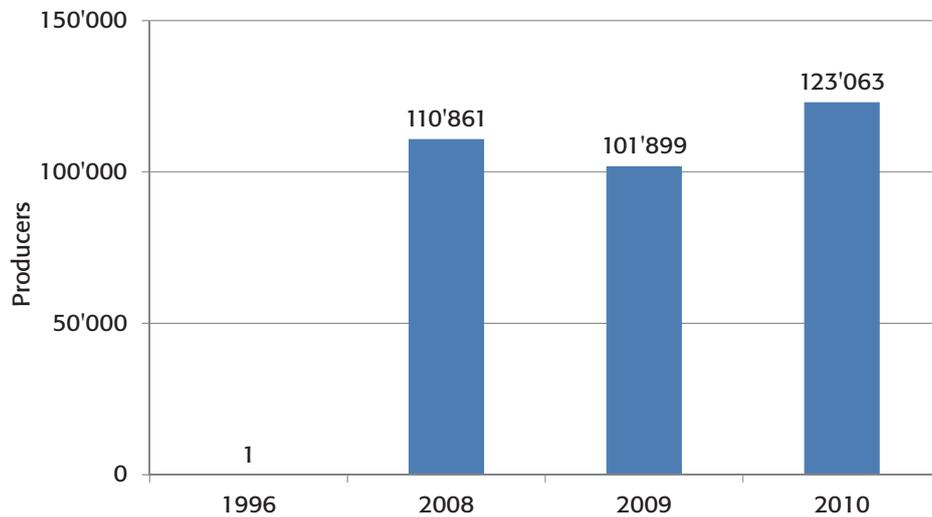


Figure 48: Ethiopia: Number of organic certified producers 1996-2010

Source: Ethiopian Association of Organic Agriculture (EAOA) Custom and Revenue Authority

Among the core certified organic products, coffee continues to take the largest share, amounting to 68'641 metric tons in 2010. This constitutes an increase of 46 percent from 2009. Sesame holds second place with a total of 8'070 metric tons, an increase of 42 percent compared with 2009. Next in importance are honey and beeswax with a total production of 440 metric tons — an increase of 28 percent compared with 2009. Furthermore, there is natural wild gum and resin collection, which accounted for 2'080.2

metric tons in 2010. In addition, 750 metric tons of barley and wheat under conversion farming were harvested.

Organic market development

Domestic market

With the exception of a study by a local company called Ecopia PLC, there is no study about the domestic market for organic products in Ethiopia. This company organizes a Bazar in Addis Ababa (capital city) every Saturday once a month, and it supplies its non-certified pineapple, cactus and mango juice, jams and cosmetics to the major retailers and supermarkets. There is a need for a separate local organic market study with information on consumer preferences.

Exports

The principal organic export products are coffee, sesame, honey, and beeswax. In addition, there are wild collected products like natural gums and resin.

Between 2005 and 2008, organic exports have shown an annual growth of 50 percent, which, however, decreased by half in 2009, due to the launch of the Ethiopian commodity exchange law. This law restricted exporters and farmers' cooperatives that export organic coffee directly, without auction at Ethiopian Commodity Exchange, regardless of the fact that they have their origin and traceability code. The commodity exchange law affected private companies that collected organic coffee and sesame from smallholder farmers.

The total organic export was 12'342 metric tons in 2010. This constitutes an increase of 43 percent compared with 2009 and by 164 percent compared with 2008. The key export destinations are the United States, Belgium, Japan, the United Arab Emirates, and China. The country earned a total of 33.9 million US dollars from exports, which is double the amount earned in 2009 (16.92 million US dollars), due to an increase in production and price. The study by Alemayehu (2010) showed that there is a need of training and creating awareness among experts at Customs and Revenue in proper documentation of organic export data.

Organic legislation

In Ethiopia, the government realized that an alternative way of agricultural production needed to be looked into, and a task force was established to draw up a policy for an Ethiopian Organic Agricultural System. The first outcome was the "Ethiopian Organic Production System Proclamation no 488/2006" approved by the parliament and issued in 2006. The key objective of this policy is clearly stated as providing a good source of income generation, environmental protection and help to ensure food security. Two years later, in 2008, due to pesticide contamination, the Japanese government banned organic coffee from Ethiopia. As a consequence, the Government of Ethiopia launched a new commodity exchange law for coffee and sesame, which restricted the exports of organic coffee and sesame by the coffee and sesame traders and exporters that do not have their own farms but collect the products from out growers. This reduced the growth organic exports by half compared with that during the years 2005 to 2008. After several lobbying, advocacy and training efforts of the Ethiopian Association of Organic Agriculture (EAOA) for agricultural policy makers, the Government of Ethiopia has issued an adjustment law allowing coffee and sesame exporters that have their own farms to export the products of the outgrower

neighbors directly, without auction at the Ethiopian Commodity Exchange(ECX). This shows that agricultural policies of a country may hinder or boost the organic sector development.

There is significant interest to support the organic sector development in the country, but now the Ethiopian Organic Agriculture Council needs to be established. It will have supervisory and facilitation role in organic certification, marketing, and labeling.

Organic research, training, and advice

Despite the domination of low-input production techniques amongst farmers, no research has been carried out thus far that is dedicated to organic production. Although there are no dedicated programs, a number of critical issues for the organic sector are taken into account through other on-going research, such as fertility building in coffee by using manure or reducing pesticide use in the control of the coffee berry disease. However, overall, research has been directed towards the issues of food security and increasing exports. The usual responses to this by most researchers are high-tech answers, which keep the researchers in their labs, instead of being in dialogue with farmers.

There is increasing awareness among farmers concerning ill health from the misuse and abuse of pesticides (Amare 2008), Amare & Abate (2008). Chemical residue analysis in importing countries is becoming increasingly vigilant. It is expected that this will drive research towards more integrated methods of crop and pest management, including organic. Government support to agricultural research is quite limited and hence the research agenda is often driven by external actors who are willing to offer support — these tend to be companies interested in promoting high external input and/or biotechnology solutions. Some research activities have been performed by NGOs in organic pest control and soil fertility management. Among these are Agri-Service Ethiopia and the Institute for Sustainable Development.

Concerning training and advice, only two organizations – the Biofarming Institute and Aco Ersha Promotion PLC - are dedicated to organic training and advice for farmers, exporters, GOs, NGOs and policy makers.

Key institutions

The government and NGOs play a vital role for the organic sector development in Ethiopia. Among the most notable are the Ethiopian Environmental Protection Authority, the Ministry of Agriculture, the Institute of Sustainable Development, the Ethiopian Organic Seed Action, Beza Development Association, Eco Shemachoche Mahber, Melca Mahber, Panos Ethiopia, Environmental Development Association(ENDA) and Forum for Environment. From farmers and private organizations Oromia Coffee Farmers Cooperatives Union, Kaleb Service Farmer House, Selet Hulling PLC, Mandura Ethiopia, Bezamare Agro Industry PLC, Apinec Agro Industry PLC and AmaroGayo Agro Industry PLC.

Support and development organizations

Generally, there is only a limited number of supporting organizations, especially with regard to financial support to developing the organic sector. In spite of the fact that their numbers decrease, there are organizations that showed strong commitment for the sector

such as Swedish Society for Nature Conservation (SSNC) based in Sweden, Cordiad and Centre for development of Enterprise (CDE), which is based in Belgium.

Outlook

The study carried out for the current edition of “The World of Organic Agriculture” revealed the previously unknown fact that Ethiopia is among the leading countries in the world and in Africa regarding the area of certified organic agriculture. Despite this fact, there is still a lot of potential for the organic agriculture sector to develop further in Ethiopia. A lot more effort is needed, however, regarding organic research, training, product diversification, and marketing for Ethiopia to maximize benefits from the sector and ensure sustainable economic development.

Links/Further Reading

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Organic Agriculture in Africa: Graphs

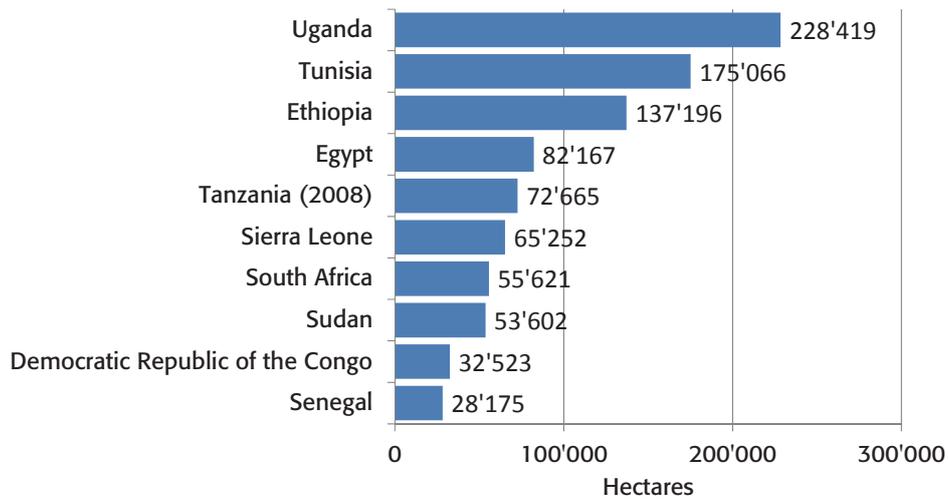


Figure 49: Africa: The ten countries with the largest organic area 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

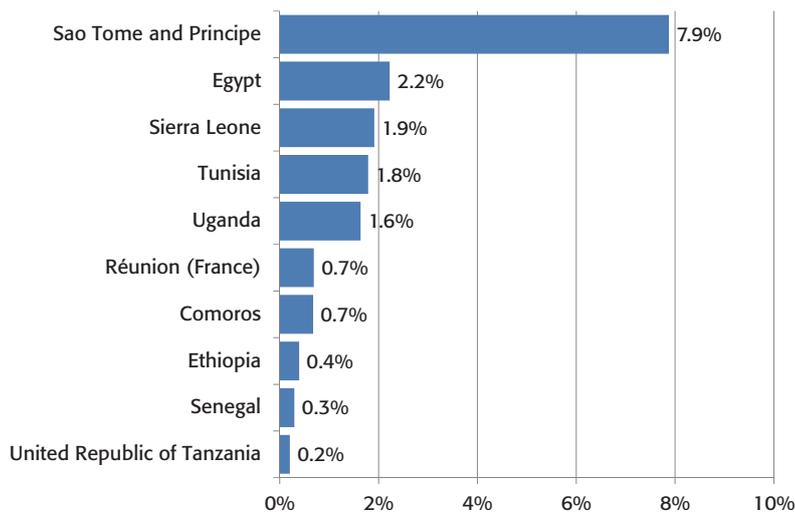


Figure 50: Africa: The countries with the highest share of organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

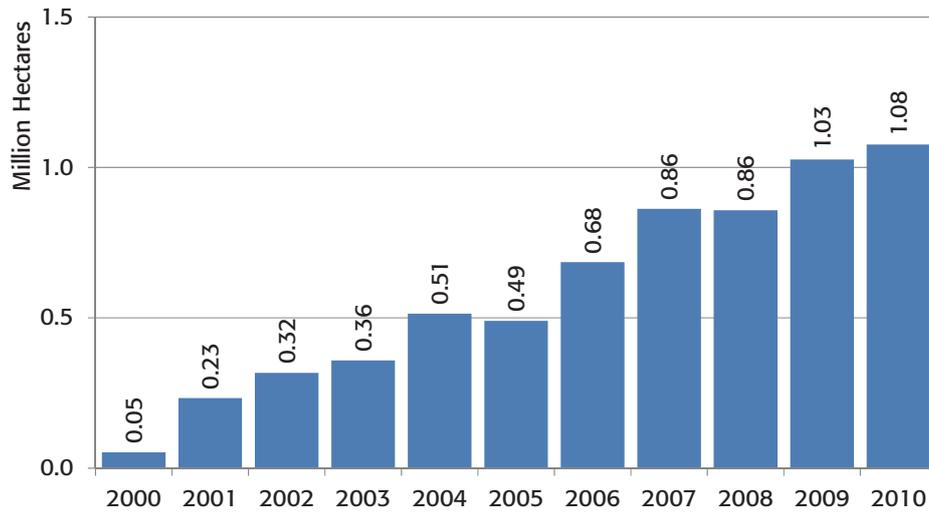


Figure 51: Africa: Development of organic agriculture land 2000 to 2010

Source: FiBL-IFOAM-SOEL-Surveys 1999-2012

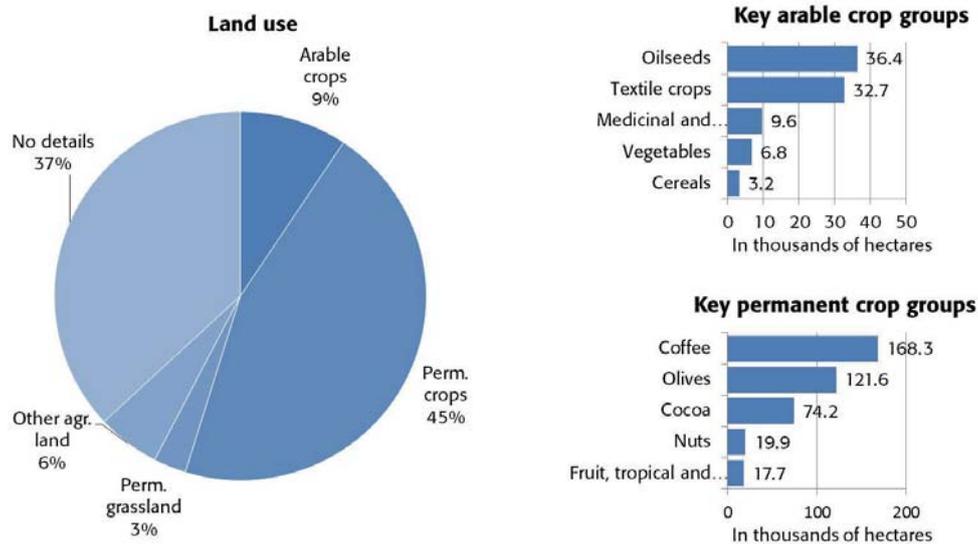


Figure 52: Africa: Use of agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Organic Agriculture in Africa: Tables

Table 44: Africa: Organic agricultural land, share of total agricultural land and number of producers 2010

Country	Area [ha]	Share of total agr. land	Producers
Algeria	622	0.00%	81
Angola	No data	0.00%	No data
Benin	1'167	0.04%	1'992
Burkina Faso	13'802	0.12%	14'026
Burundi	350	0.02%	35
Cameroon	496	0.01%	763
Chad	No data	0.00%	No data
Comoros	1'045	0.67%	958
Côte d'Ivoire	18'133	0.09%	735
Democratic Republic of the Congo	32'523	0.14%	1'122
Egypt	82'167	2.23%	790
Ethiopia	137'196	0.39%	123'062
Ghana	12'635	0.08%	2'327
Guinea-Bissau	No data	0.00%	No data
Kenya	4'842	0.02%	12'647
Madagascar	20'288	0.05%	6'875
Malawi	824	0.01%	9'004
Mali	15'199	0.04%	27'711
Mauritius	35	0.04%	2
Morocco	17'030	0.06%	120
Mozambique	5'519	0.01%	6
Namibia	124	0.00%	792
Niger	48	0.00%	1
Nigeria	11'979	0.02%	517
Réunion (France)	276	0.69%	61
Rwanda	3'600	0.18%	535
Sao Tome and Principe	4'411	7.88%	2'009
Senegal	28'175	0.30%	22'755
Sierra Leone	65'252	1.91%	22'512
Somalia	No data	0.00%	No data
South Africa	55'621	0.06%	242
Sudan	53'602	0.04%	1'003
Swaziland	6	0.00%	1
Togo	3'409	0.10%	3'618
Tunisia	175'066	1.79%	2'487
Uganda	228'419	1.64%	188'625
United Republic of Tanzania	72'665	0.20%	85'366
Zambia	7'310	0.03%	10'055

Country	Area [ha]	Share of total agr. land	Producers
Zimbabwe	1'995	0.01%	3
Total	1'075'829	0.10%	542'839

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 45: Africa: All organic areas 2010

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Algeria	622		1'004	1'626
Angola				
Benin	1'167			1'167
Burkina Faso	13'802		56'309	70'111
Burundi	350			350
Cameroon	496		6'000'000	6'000'496
Chad			2'000	2'000
Comoros	1'045		385	1'430
Côte d'Ivoire	18'133		500	18'633
Democratic Republic of the Congo	32'523			32'523
Egypt	82'167			82'167
Ethiopia	137'196		458	137'654
Ghana	12'635		19'551	32'185
Kenya	4'842		99'903	104'745
Lesotho			45'000	45'000
Madagascar	20'288		44'962	65'249
Malawi	824	185	5'346	6'354
Mali	15'199			15'199
Mauritius	35			35
Morocco	17'030		618'200	635'230
Mozambique	5'519			5'519
Namibia	124		3'000'000	3'000'124
Niger	48			48
Nigeria	11'979			11'979
Réunion (France)	276			276
Rwanda	3'600		79	3'679
Sao Tome and Principe	4'411			4'411
Senegal	28'175		432	28'607
Sierra Leone	65'252			65'252
South Africa	55'621		51'218	106'839
Sudan	53'602		122'000	175'602
Swaziland	6			6
Togo	3'409		650	4'059
Tunisia	175'066		228'089	403'155

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Uganda	228'419			228'419
United Republic of Tanzania	72'665			72'665
Zambia	7'310		5'910'000	5'917'310
Zimbabwe	1'995			1'995
Total	1'075'829	185	16'364'414	17'440'428

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 46: Africa: Land use in organic agriculture (fully converted and in conversion) 2010

Main use	Crop category	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	394'821
Arable crops	Arable crops, no details	11'152
	Cereals	3'208
	Flowers and ornamental plants	2
	Green fodder from arable land	150
	Medicinal and aromatic plants	9'561
	Oilseeds	36'363
	Protein crops	35
	Root crops	179
	Sugarcane	34
	Textile crops	32'688
	Vegetables	6'767
Arable crops total		100'139
Cropland, no details	Cropland, no details	6'373
Other agricultural land	Fallow land, crop rotation	17'809
	Other agricultural land, no details	29'441
	Unutilized land	11'156
Other agricultural land, total		58'406
Permanent crops	Berries	36
	Citrus fruit	7'328
	Cocoa	74'195
	Coconut	2'128
	Coffee	168'293
	Flowers and ornamental plants, permanent	24
	Fruit, temperate	6'370
	Fruit, tropical and subtropical	17'696
	Grapes	1'719
	Medicinal and aromatic plants, permanent	11'475
	Nuts	19'923
	Olives	121'631
	Other permanent crops	53'553
	Tea/mate, etc.	1'368
Permanent crops total		485'739
Permanent grassland total		30'351
Total		1'075'829

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 47: Africa: Use of wild collection areas 2010

Category of crops harvested	Area [ha]
Beekeeping	11'910'458
Forest honey	58'417
Fruit, wild	18'354
Medicinal and aromatic plants, wild	3'293'431
Nuts, wild	75'183
Oil plants, wild	445'000
Wild collection, no details	437'749
Wild collection, other	125'822
Total	16'364'414

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Asia



Map 3: Organic agricultural land in the countries of Asia 2010

Source: FiBL-IFOAM 2012; based on information from the private sector, certifiers, governments and the Mediterranean Organic Agriculture Network.

For detailed data sources see annex, page 307.

Organic Asia 2012¹

ONG KUNG WAI²

In Asia, a major decrease of organic agricultural land and producers occurred in 2010. Domestic markets and exports, however, continue to enjoy healthy growth.

Organic land developments

Figures for 2010 indicate a reduction of 0.6 million hectares from previously reported wild harvest, organic aquaculture, and cultivated land. Land under organic agricultural management, which reached 3.6 million hectares in 2009, is now just 2.8 million hectares. Thus, it is lower than the under 2.9 million hectares reported for 2007. Total acreage including wild harvest and aquaculture is just above 7.6 million hectares, down from 8.2 million hectares in 2009. Total organic acreage in 2010 is 92 percent of what it was in 2009, and organic agricultural land is 78 percent of the report area for 2009.

The decrease of organic land is largely due to sharp declines in Chinese and Indian acreage. Figures also reveal that most countries and territories listed elsewhere in Asia experienced growth over 2009 (e.g. Armenia, Indonesia, Israel, Kyrgyzstan, Nepal, Philippines, Tajikistan, and Vietnam). Indonesia registered an increase of over 25'000 hectares —an increase of 50 percent. The Philippines added 28'000 hectares. Vietnam added 5'000 hectares.

India

Just one year after reporting a 160'000 hectare expansion of cultivated acreage from close to 1.02 million hectares in 2008 to 1.18 million hectares in 2009, the Indian Agriculture and Processed Food Product Export Development Authority (APEDA) now reports that the cultivated area has shrunk to 0.78 million hectares. At the same time, the wild harvest acreage increased by 290'000 hectares.

A large part of the reduction is reportedly due to spread of BT cotton and non-availability of non-BT seeds.³ Contamination resulted in rejection of certification of some large farmer groups. Pressure on organic cotton prices also caused many farmers to switch to GM cotton farming. Moreover, earlier exuberance driving conversion may be phasing off a little. Export volume for India has been low in comparison to potential production based on reported acreage for some time. The Central and State Governments are withdrawing certification support schemes after a five-year period. As expected, not all groups renewed their certification when state support ended as many farmer groups have yet to establish market channels. Data correction also contributed to the difference as the on-line traceability scheme (Tracenet) introduced by APEDA is implemented. As it is now mandatory for farmers and groups to register production details on the web-based certification data management system, APEDA, the Indian competent authority, has more accurate figures to report.

¹ With input from Dr. PVSM Gouri, APEDA, India; Vitoon Panyakul, Greenet, Thailand, and Zhou Zejiang, IFOAM, Germany/China.

² Ong Kung Wai, Humus Consultancy, Penang, Malaysia

³ See also page 46 with further information on India.

China

The Chinese numbers are also reported to be more accurately done. China's figures are based on the Certification and Accreditation Administration of China's presentation at the Organic Trade Union of China (OTUC) Summit, where it was mentioned that a total of 6'400 organic certificates were issued in 2010. The total acreage of certified organic land is 2.3 million hectares of which 1.4 million hectares are for crops—a drop of 400'000 compared to the 1.85 million hectares reported for 2008.

Due to stricter supervision from government and competition between organic operators, some operators have withdrawn their certification. There are cases of Chinese suppliers certified organic in 2008 that have yet to ship their first big export order. Like India, producers in China may have decided not to renew their certification until they find markets or the market finds them. Development of alternatives to third party certification, such as Community Supported Agriculture (CSA) and Participatory Guarantee Systems (PGS), have also reportedly reduced official statistics of third party certified acreage.

Markets and trade: Continued growth

Interestingly, the contraction in land management figures has not affected trade. India's export volume increased by 20 percent over the previous year to 69'837 metric tons, registering a value of 157.22 million US dollars, an increase of 41 percent over the previous year. Export destination figures indicate growing trade in the region. Thirteen percent of export by volume was to Asia. Others include the European Union (EU): 44 percent, Canada: 22 percent and the United States: 19 percent

Reports on the Chinese domestic market paint a picture of robust growth. According to a presentation from the China Organic Food Certification Center (COFCC), export of organic products at the end of 2009 amounted to 464 million US dollars, accounting for 1.2 percent of total agricultural exports. Domestic sales reached 10.6 billion yuan (about USD 1.587 billion), amounting to about 0.2 percent of total food consumption in China. A significant part of organic products in the domestic market are imports. Dr. Li Xianjun of COFCC believes the current import of upmarket, quality organic products such as wines, cosmetics, and textile products may already value more than the 464 million US dollars of organic agricultural commodities exported.

Meanwhile, an update posted by the International Trade Centre on August 5, 2011 estimated there were 2 million hectares of certified land with a total organic production valued at about 2.4 billion US dollars in 2008. The domestic organic market reached 1.1 billion US Dollars and exports exceeded 500 million US dollars. The remaining organic products (worth 800 million US dollars) were sold as conventional products. Organic imports are estimated at about 20 million US dollars in 2009.

Table 48: Asia: Summary and comparison of organic areas in 2009 and 2010.

Country	Land use	2009 [ha]	2010 [ha]	Change [ha]	2010 share of 2009 area
Afghanistan	Agriculture	63	61	-2	97%
Armenia	Agriculture	600	750	+150	125%
	Wild collection	500	500		
Azerbaijan	Agriculture	20'339	21'347	+1'008	105%
	Wild collection	372	399	+27	107%
Bangladesh	Agriculture	1'162	799	-364	69%
	Aquaculture	7'717	7'717		
Bhutan	Wild collection	19'419	15'604	-3'815	80%
Cambodia	Agriculture	10'725	8'084	-2'640	75%
China	Agriculture	1'853'000	1'390'000	-463'000	75%
	Aquaculture	415'000			
	Wild collection	759'000	900'000	141'000	119%
Georgia	Agriculture	1'208	1'401	193	116%
	Wild collection	2'618	865	-1'753	33%
India	Agriculture	1'180'000	780'000	-400'000	66%
	Wild collection	3'360'000	3'650'000	290'000	109%
Indonesia	Agriculture	46'720	71'208	24'488	152%
	Aquaculture	94	94		
	Wild collection	32'675	32'700	25	100%
Iran	Agriculture	8'853	7'256	-1'597	82%
	Wild collection	17'000	38'200	21'200	225%
Israel	Agriculture	6'969	8'794	1'825	126%
Japan	Agriculture	9'067	9'067 (2009)		49%
Jordan	Agriculture	1'053	1'469	416	140%
Kazakhstan	Agriculture	134'862	133'562	-1'300	99%
	Wild collection		1'300	1'300	
Kyrgyzstan	Agriculture	11'415	15'040	3'893	132%
Lao PDR	Agriculture	4'878	4'885	6	100%
Lebanon	Agriculture	3'332	1'227	2'105	37%
	Wild collection	111			
Malaysia	Agriculture	1'582	1'582 (2009)		
Nepal	Agriculture	8'059	9'736	1'678	121%
	Wild collection	24'422	24'922	500	102%
Occupied Palestinian Territory	Agriculture	1'000	6'354	5'354	635
Oman	Agriculture	39	39		
Pakistan	Agriculture	20'321	22'103	1'782	109%
Philippines	Agriculture	51'806	79'992	28'186	154%

Republic of Korea	Agriculture	13'343	15'518	2'175	116%
Saudi Arabia	Agriculture	46'635	42'376	-4'259	91%
Sri Lanka	Agriculture	21'156	22'260	1'104	105%
Syrian Arab Republic	Agriculture	35'439	35'439 (2009)		
Taiwan	Agriculture	2'962	2'962		100%
Tajikistan	Agriculture	70	391	321	559%
Thailand	Agriculture	29'597	34'079	4'482	115%
	Wild collection		701	701	
Timor-Leste	Agriculture	24'997	24'750	-247	99%
United Arab Emirates	Agriculture	373	360	-13	96%
Uzbekistan	Agriculture	324	65	-259	20%
	Wild collection	8'220	145'621	137'401	1'772%
Vietnam	Agriculture	14'012	19'272	5'260	138%
	Aquaculture	6'041	11'650	5'609	193%
	Wild collection	450	2'565	2'115	570%
Asia total	All areas	8'227'889	7'619'721	-608'167	93%
	Agriculture	3'567'672	2'778'291	-789'381	78%

Source: Author's elaboration based on the data from the FiBL-IFOAM Survey

Whilst different data sources may differ in numbers, there is no doubt domestic market development has been in the press a lot and caught the attention of policy makers recently in China. Press reports on poor performance of some organic farms and companies as well as questioning the integrity of organic labeling have led the Chinese government to crack down on errant certification. The Chinese premier and vice premier have both commented on the need for better discipline in the organic certification industry. Organic certification bodies were asked to re-inspect all their certified operators. Four certification bodies have been de-registered or withdrawn. Whilst it bodes well for the industry in the long term, growth of the Chinese organic sector is likely to be more subdued in 2012 and 2013 amidst the internal house cleaning. The Chinese national standard and certification management rules have also been revised and will be implemented from March 1 of 2012.

Elsewhere, whilst there is growing interest especially from food processing companies, Thailand reported a slower than expected growth. Soon after an intensely contested controversial election and change of government, the country was hit with the most severe flood in recent history. Now, political attention and budget allocation for recovery and rehabilitation programs are likely to prioritize water management issues over organic agriculture. The government-guaranteed price for agricultural produce revised by the new government to a historic high (e.g. for jasmine rice) is expected to reduce the incentive for farmers to convert to organic. The good news is the EU approval of Organic Agriculture

Certification Thailand (ACT)¹, the local organic certification body. Now Thai exporters can access certification for the EU from a Thai certification body.

The Myanmar Organic Agriculture Group (MOAG) set up in 2009 has grown to around 100 members as of December 2011. MOAG provides technical support and organic certification services to interested producers. There are currently 6 organic farms in Myanmar, covering 59.89 hectares of crop farmlands, certified by MOAG and Organic Agriculture Certification Thailand (ACT).

Organic producers in Fukushima, a major agricultural production area in Japan, are suffering triple blows. First the tsunami, second the nuclear power station incident, and now they will have to wait for the market to get over its fear of radiation contamination before demand for organic and non-organic production from the prefecture resume to normal.

Standards, certification and regulation

The diverse mix of scenarios, from highly developed regulatory frameworks to non-regulated developing markets in countries and territories covered by the GOMA Scoping Study for Harmonisation and Equivalence of Organic Standards and Technical Regulations in the Asia region, reported in the previous (2011) edition of this book, remain without much change.

Organic labeling is regulated to require third party certification in China, India (for export), Japan, Philippines, South Korea and Taiwan. Malaysia joins the above in 2012. Import rules are still pending for Malaysia, Philippines, India, and South Korea (for processed products). Six of the existing national organic standards include animal husbandry, i.e. China, India, Japan, South Korea, Thailand, and Vietnam. Three include aquaculture requirements, i.e. China, Thailand and Vietnam.

Only India and Japan have established third country recognition with the EU as well as recognition of their accreditation system by the USDA. Other established systems in the region have yet to facilitate export recognition. Most exports elsewhere are certified by international certification bodies working in the regions accredited by international and EU based accreditation bodies or directly by the USDA.

Foreign certification bodies working in the region may not have offices in the country and territories where inspections are conducted. Inspections may be conducted through local contracted inspectors or external inspectors on short missions.

Certification for exports by foreign certification bodies are generally not subject to compliance to national standards or supervision by national authorities, except where there is a recognition agreement between the exporting and importing countries.

Local certification bodies in the region, except for China and India, are relatively small and face difficulties competing with international certification bodies. A number of private and government linked certification bodies are collaborating in inspection and certification under the guise of Certification Alliance (CertAll).² The collaboration launched in 2008 now includes ten partners in nine countries (i.e., China, Indonesia, Laos, Malaysia, Nepal,

¹ Organic Agriculture Certification Thailand (ACT), for information see <http://www.ioas.org/act.htm>

² Certification Alliance - www.certificationalliance.org

Philippines, Sri Lanka, South Korea, and Thailand). Partners in Vietnam, India, and Bhutan are expected to be included later in 2012. A common regional private standard—in line with the Asian Regional Organic Standard (AROS)—was developed by the CertAll partners with the support from the GOMA¹ project in 2011. Adoption and use, replacing respective partners' private standards, is expected to begin later in 2012.

Of those who have implemented import rules, only Taiwan has recognition agreements for imports. No recognition agreement has yet been reached between governments within the region.

The GOMA Harmonization and Equivalence for Organic Agriculture in Asia initiative, launched in May 2010 continues to make progress. The Working Group for Cooperation on Organic Labeling and Trade for Asia comprising members from public and private sectors from 15 countries and territories which met in Mumbai in December 2010, met again in Seoul, South Korea in conjunction with the Organic World Congress in September 2011.

At the Seoul meeting, final consultation on the second draft of the Asian Regional Organic Standards (AROS) was held. Philippines and Indonesia delegates reported on progress made from their equivalence discussion. A Conformity Task Force has since been formed and met in Malaysia in January 2012 to discuss modalities to recognize equivalent supervision of certification and to maintain a multi-party equivalence/recognition agreement. Results will be reported at the GOMA "Let the Good Products Flow" conference at Nuremburg in February 2012 in conjunction with BioFach.

1 Global Organic Market Access (GOMA) - www.goma-organic.org

Table 49: Asia Summary of regulatory frameworks, accreditation and certification rules in the region

Country & Territories	Regulation	Additional Scope*	Authority	Accreditation	Certification Bodies*	Inspectors	Recognition Export/Import
India	Export & (Domestic pending)	Livestock	APEDA	Mandatory (NAB)	22 domestic (12 foreign)		EU third country list & USDA equiv
Japan	Domestic & Imports	Livestock (optional)	MAFF	Mandatory (FAMIC)	61 domestic 40 external		EU third country list & USDA equiv
China	Domestic & Imports	Livestock & Aquaculture	CNCA	Mandatory (CNAS)	21 domestic (4 foreign)	National registration	
South Korea	Domestic & Imports	Livestock	MiFAFF	Mandatory (MiFAFF & NAQS)	33 domestic	National registration	
Philippines	Domestic & Imports		BAFPS	Mandatory (BAFPS)	1 domestic		
Malaysia	Domestic & Imports		DoA	NA	1 Govt prog 1 domestic		
Indonesia	National & Private Std		OKPO (MoA)	Mandatory (KAN)	7 domestic		
Thailand	National & Private Std	Livestock & Aquaculture	ACFS	Voluntary (ACFS)	4 Govt prog 2 domestic		
Laos	National Std		DoA	NA	1 Govt prog		
Nepal	National & Private Std		NA	NA	1 domestic		
Vietnam	National Std	Livestock & Aquaculture	NA	NA	1 domestic (1 foreign)		
Sri Lanka	National draft & Private Std		NA	NA	2 domestic (1 foreign)		
Bhutan	National draft		NA	NA	NA		
Cambodia	Private Std		NA	NA	2 domestic		

* Additional scope besides Crop production; Wild harvest and Processing

* Certification Bodies: current situation may differ since last reporting

Development challenges

Challenges mentioned in the previous report remain (Ong 2011). If growth is to be sustained and not constrained, a regional multilateral agreement on organic labeling and

trade in the region needs to be established. Whilst forward constructive steps are being taken in the GOMA process, the idea of achieving a multilateral agreement by May 2012 now appears to be unlikely.

Public sector participation from Japan, South Korea and China were sorely missed at the GOMA meeting in Mumbai in 2010. At the GOMA meeting in Seoul in 2011, China participated, but Japan and South Korea did not. Those present should be applauded on their decision to move ahead with or without participation of Japan and South Korea.

Whilst collaboration is key, leadership is essential to the process. As policy makers of the more developed markets are not stepping forward, from which corner will Asia find the public sector leadership required to forge a regional multilateral agreement?

Consensus on leadership amongst civil society and the private sector in Asia is also lacking. Expectation of a greater international leadership role, based on development in the region, led to the nomination of 7 out of 20 candidates from the region for the recent IFOAM World Board elections. Although the Organic World Congress and IFOAM General Assembly was held successfully for the first time in Asia (Seoul), all too disappointing for Asian delegates was that only one candidate from the region was elected, compared to four Asians in the previous World Board.

Asia may be on the rise. Whilst it may be time for Asia, it will not be Asia's time, until Asia is ready to lead itself. It is time for the Asia organic community to truly manifest itself through a regional recognition agreement on organic labeling and trade. Hopefully the GOMA regional recognition initiative will bear result in time for Asia to lead others. Or will Asia continue to be led by others?

Reference

Ong, Kung Wai (2011): Organic Asia. In: The World of Organic Agriculture 2011. IFOAM, Bonn and FiBL, Frick.

Organic Agriculture in Azerbaijan

VUGAR BABAYEV¹

Overview

Azerbaijan is the largest country in the South Caucasus, both in terms of population and land area. After the collapse of the Soviet Union in 1991, Azerbaijan gained its independence and went through a significant development process. Azerbaijan's integration into the international community as an independent country is essential to its future development and progress. Azerbaijan's president Ilham Aliyev declared 2010 to be the "Year of Ecology", thus raising interest on environmental issues and organic agriculture in Azerbaijan. Organic production is seen as a model for sustainable agriculture, opening new opportunities to address social, ecological, and economic problems. The Republic of Azerbaijan participates in many programs of the United Nations and International Conventions related to sustainable agriculture. It is gratifying to see the progress made in the past ten years.

History

The carrier of the organic idea and the founder of the organic movement in Azerbaijan was the Ganja Agribusiness Association (GABA), constituting itself in 1998. Organic agriculture was a response to environmental issues; however, it emerged because Azerbaijani farmers are still suffering from the reorientation and restructuring process, which resulted from the conversion of collective land to individually owned land in 1996. Access to farm resources, especially to fertilizers, pesticides, and veterinary products, was difficult or expensive. The development of organic agriculture is seen as an option for Azerbaijani farmers to develop a sustainable agricultural production system in an environmentally supportive and economically sound way.

Overcoming and eliminating the "soviet" way of thinking was the most serious obstacle to the development and expansion of organic agriculture. Under the soviet system, farmers were told what to grow and they worked collectively, whereas under the current free market system they have choices. This situation required the organization of trainings, seminars, conferences, field demonstrations as well as other activities for farmers and government officials. These activities were carried out by GABA, with the support of a network of international organizations and partners such as the Eurasia Foundation,² the Avalon Foundation Avalon,³ ICCO,⁴ EED,⁵ EPER,⁶ CIMMYT,⁷ Elkana,⁸ and others.

¹ Vugar Babayev, Ganja Agribusiness Association (GABA), 19 Javad Khan Street, AZ 2000, Ganja, Azerbaijan, Tel. +99422 256 94 00, Fax +99422 252 12 61, office@gaba.az, www.gaba.az

² Eurasia Foundation: www.eurasia.org

³ Avalon Foundation: www.avalon.nl

⁴ ICCO is the interchurch organisation for development cooperation: www.icco.nl

⁵ Evangelischer Entwicklungsdienst, Church Development Service (EED), www.eed.de

⁶ Aaid organisation of the Protestant Churches of Switzerland l'Entraide Protestante Suisse (HEKS/EPER), www.heks.ch

⁷ International Maize and Wheat Improvement Center (CYMMIT), www.cimmyt.org

⁸ Elkana is an organic organisation in Georgia: www.elkana.org.ge

Key institutions

The expansion of organic agriculture also required institutional development, and in 1996, the basis for the foundation of the Federation of Organic Agriculture Movements of Azerbaijan was laid. Today, this federation unites schools of higher education and scientific research institutes as well as further institutions such as:

- Azerbaijan State Agricultural University (ADAU)
- Ganja Regional Center of Science (GREM)
- Lankaran Regional Center of Science (LREM)
- Scientific Research Institute of Vegetable growing (ETTI)
- State Committee of Soil and Cartography of Azerbaijan
- Scientific Research Institute of Plant Protection (AzETBMI)
- Ganja Territorial Management of Agriculture (GRKTI)
- Scientific Research Institute of Mechanization of Agriculture (KTMI)
- Lenkoran state University (LDU) and others

Non-governmental and business member organizations include:

- Scientific-Methodical and Advisory-Information center of agrarian reforms) (AIEMMIM)
- Center of Agrarian Information (AIM)
- Gakh Center of Business Resource (QBRM)
- Zagatala Center of Business Resource (ZBRM)
- Shaki Center of Business Resource (ŞBRM)
- Khanlar Center of Agrarian Consultation (XAM)
- Samukh Center of Agrarian Consultation (SAM)
- Geranboy Center of Agrarian Consultation (GAM)
- Amin Credit Union (AKI)
- The Azerbaijan Confederation of Businessmen (ASK)
- AZEKOSERT, the local certification body
- Association of Young Leaders (AYLA).

Further members include large farms and processing enterprises as well as representatives of relevant ministries and state control bodies.

Education, extension, and training

In organic agriculture, training and education play a decisive role. The development of new skills and capabilities of farmers to manage an organic farm are all connected with education.

During the past ten years, GABA developed and put into practice a flexible educational model. It has the following aims:

- To increase the practical knowledge of farmers;
- To train new advisors;
- To promote organic thinking among young people;
- To educate various population groups;

- To periodically work with refugees and IDP (Internally Displaced Persons) communities.

During the training process, interactive methods are applied. The training modules and the educational material are reaching international standard, including target group-oriented teaching materials, scientific-methodical manuals, presentations, information stands at events, films or brochures. At the beginning of trainings, a quick survey is carried out in order to identify the knowledge level of the group. The courses cover problems in organic agriculture, basic knowledge of the laws of nature, methods of soil fertility management and plant protection and further themes.

In 2006, GABA filed a petition to the Academic Council of the Agricultural Academy of Azerbaijan to establish the course “Organic Agricultural Management”. The positive decision of the Academic Council of the Agricultural Academy of Azerbaijan was supported by the Ministry of Education and the Cabinet of the Republic of Azerbaijan. The first 16 students were admitted to this course in 2007.

The author is pleased to say that, among the CIS countries¹, Azerbaijan was the first to implement such activities. With the intent to promote scientific education and research on organic agriculture, the Academic Council of the Azerbaijan Agricultural Academy (now known as Azerbaijan State Agricultural University) established a new department “Soil science, agro chemistry and organic agriculture”. It is equipped with a modern technological infrastructure. Thus, in the near future, organic agriculture of Azerbaijan will have access to staff with a higher education.

Legislation

In 2004, a group of experts from the Azerbaijan Agricultural Academy (now known as Azerbaijan State Agricultural University) and GABA, under the direction of Professor A. Babayev, worked out the bill “About organic agriculture”. This bill was published in the national and regional press in order to inform the public and then submitted to the Parliament and relevant ministries of the Republic.

It was only in April 2007, that this project was dealt with the Parliament’s Commission on Agriculture. Finally, on August 25, 2008, President Ilham Aliyev approved the Law on Organic Agriculture, which was proposed, drafted and sponsored by GABA.

Production data and operators

In Azerbaijan, according to GABA, currently approximately 20’000 hectares of agricultural land are under organic management. This constitutes 0.43 percent of the country’s agricultural land. One of the reasons for the stagnation in the organic area is a lack of knowledge, education or awareness on organic agriculture. Thus, GABA is mainly engaged in promoting public awareness of organic agricultural products in the country, aiming to achieve the overall development of the sector.

¹ The Commonwealth of Independent States (CIS) is a regional organization whose participating countries are former Soviet Republics, formed during the breakup of the Soviet Union.

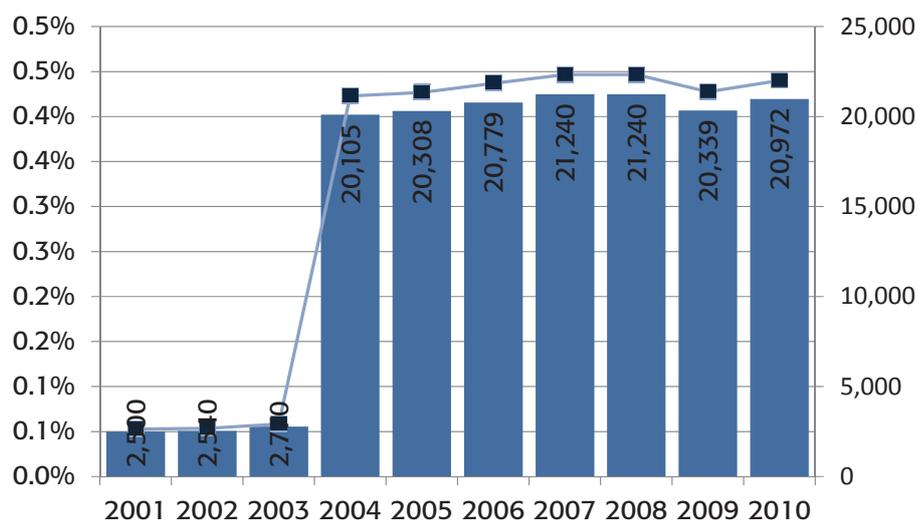


Figure 53: Azerbaijan: Development of the organic agricultural land 1999-2010

Source: GABA/Azekosert

In Azerbaijan, a wide range of crops is grown. Two-thousand hectares were used for cereals, 340 hectares for vegetables, 1'180 hectares for perennial herbs, 16'400 hectares for pastures and hay, and 770 hectares for wild fruits and medicinal plants. (See Table 51)

Since 2000, approximately 1'700 farmers have been trained. Of these, almost 400 are certified today.

Processing

Currently, processing of organic products is carried out at three large enterprises (Table 50). Furthermore, organic products are processed by a number of family farms, specializing in the drying of fruit (plums, apricots, figs, apples, cornel, persimmons and wild growing fruits) and the production of jams, pickles, juices and compote.

Table 50: Azerbaijan: Enterprises processing organic products

Name of enterprise	Administrative arrangement	Priority of manufacture
Reyhan Ltd.	Gakh district	Wild growing fruits (dog rose, hawthorn, sea buckthorn)
RDR Co.	Ganja	Juices and compotes (pomegranates, quince, raspberry, blackberry)
Suleyman Agricultural Co-op	Shamkir district	pomegranate juice and sauce, pickles and jams

Table 51: Azerbaijan: Land use and key crop groups 2010

Main use	Main crop category	Area [ha]
Arable crops		3,284
	Arable crops, other	6
	Cereals	1,932
	Green fodder from arable land	412
	Medicinal and aromatic plants	11
	Oilseeds	76
	Protein crops	6
	Root crop	295
	Seeds and seedlings	69
	Strawberries	8
	Textile crops	129
	Vegetables	340
Other agricultural land		62
Permanent crops		1,180
	Citrus fruit	5
	Fruit, temperate	595
	Fruit, tropical and subtropical	249
	Grapes	34
	Medicinal and aromatic plants, permanent	3
	Nuts	262
	Olives	10
	Tea/mate, etc.	23
Permanent grassland		16,400
Total		20,927

Source: GABA/Azekosert

The organic consumer

Research carried out by GABA in the past two years show that the interest of consumers has greatly increased. At present, more than five percent of the population may be considered a potential consumer of organic products, according to a study carried out by GABA in 2007.

This research shows that, compared with conventional farms, the production of organic farms is more profitable, with profitability increasing every year. This is due to an increase of the demand for organic products and the expansion of the organic market, thus stimulation of the overall development of the sector.

Exhibitions and fairs for organic products are periodically organized by GABA in order to give the support essential to producers and processors in strengthening the realization of their production. In 2007, GABA developed a strategy for organic products according to conditions of Azerbaijan.

Research has shown that in Azerbaijan, as all over the world, the prices for organic products are higher than the prices for conventional products. A comparison of prices show that price premiums for organic products in Azerbaijan correspond to those of European countries, but there are exceptions. Consumers are ready to pay the additional cost for organic products.

Export market

In 2010, Azerbaijan exhibited for the first time its organic products at the BioFach World Organic Trade Fair, in Nuremberg, Germany. GABA represented Azerbaijan at this fair together with its partner, the first national Organic Certification Body AZEKOSERT LLC and displayed six products of its farmer members: Pomegranate, quince, fig, cornel, persimmon, and alcha lavashi.¹ These products were well received by internationally known companies such as HIPP, APICON, Marab, IMO and by other visitors as well, especially German restaurants and supermarkets. A number of orders were placed.

Two representatives from the Ministry of Economic Development of Azerbaijan also participated at the fair. Azerbaijani organic products can be distinguished from the products of other countries due to their taste and quality, which are due to the country's fertile soils and exceptional climate.

The German Society for International Cooperation (www.GIZ.de) and the Institute for Market Ecology (www.IMO.ch) from Switzerland support GABA's participation in international exhibitions and the promotion of organic, fair and wild products.

Conclusion

Azerbaijan's soil and climatic conditions are favorable for the cultivation and production of prime quality products (vegetables, fruits, grapes, citrus, tea, cotton, nuts, etc.). Considering the positive factors such as the creation of a legislative base, the increasing state support in the form of subsidies, the international accreditation of the local certification body, and the development of a harmonious system of training and advanced consultancy service, the country has real opportunities to increase the volume of organic production by approximately 300 to 400 percent.

The main obstacle to the development of organic agriculture is the problem of mentality related to organic agriculture and its real advantages as seen by various consumers. This consumer perception can be overcome by increasing information for consumers, in particular in rural areas and by creating regional organic demonstration farms.

Further reading

Babayev, Amin (2010): Organic agriculture development condition and prospective in Azerbaijan was published in several languages and is available at the GABA office.

¹ Scalded cherry plums are passed through a colander in order to remove skins and stones. The broth is then boiled and thickened. The thick marmalade mixture is spread over drying trays and sun dried. The cherry plum lavash is eaten together with the main food course or as an appetizer.

Organic Food & Farming in Iran

PAUL RYE KLEDAL¹, HOSSEIN MAHMOUDI², AND ABDOL MAJID MAHDAVI DAMGHANI³

Geography and socio-economy

If one should compare the complexity of the geo-physical landscape of Iran with another nation it would be Spain. Both countries have a vast central tableland, arid summers, and are often bitterly cold in winter. Both also have wild mountainous areas that are infertile. However, in Iran the scale is larger (Iran is over three times the size of Spain), the mountains are loftier (more than 4'000 meters), and the extremes of heat and cold are more pronounced. The country itself is an elevated plateau (more than 1'000 meters above sea level) set between two depressions: the Caspian Sea to the North and the Persian Gulf to the South.



Picture: A young shepherd with his goats in North Central Iran

The central plateau is surrounded by two tall mountain ranges. In the North (following an east-west line) is the Alborz range creating a fertile coastal plain along the Caspian Sea where the major crops are rice, tea, and citrus. In the west, going south all the way to the Persian Gulf, is the Zagros mountain range reaching more than 4'000 meters in height in some places. Transverse valleys along the Zagros mountain range still have remains of what was once vast oak, pistachio, almonds and walnut forests, but are now mainly occupied by grazing herds of sheep and goats. In general, the mountainous areas and the valley floors offer opportunities for growing wheat and barley accounting respectively for 50 and 17 percent of Iran's agricultural production. On the plateau, sugar beet and potatoes are grown, while in more arid areas one can find plantations with dates, jujubes, and tamarisks. Iran's pistachio production is located in vast groves of desert oases in the southeast,

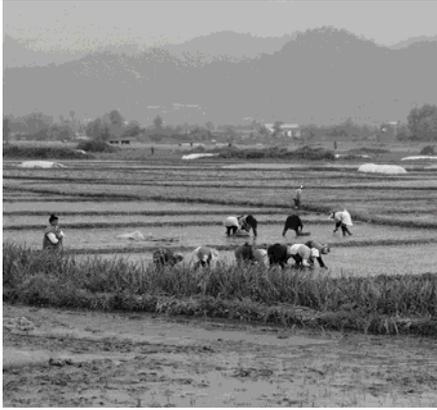
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supporting the earnings of 350'000 people. Iran is the world's largest producer and exporter of pistachios (200'000 metric tons), followed by USA and Turkey (Blunt 2009; Loveday et al. 2010; Wikipedia: Economy of Iran).

Roughly one third of Iran's total surface area is suited for farmland, but because of poor soil and lack of adequate water distribution in many areas, most of it is not under cultivation. Only 12 percent of the total land area is under cultivation, but less than one third of the cultivated area is irrigated; the rest is devoted to dry farming. Farmland is increasingly suffering from overgrazing, desertification, water pollution and soil degradation (salination).



Picture: Women planting rice at the fertile coastal plain by the Caspian Sea, Northern Iran

Agriculture itself contributes to 11 percent of the GDP, holds almost 30 percent of the export earnings, but contains 25 percent of the labor force illustrating a sector of low productivity. About 78 percent of the farms have less than 10 hectares, and 11 percent have less than 1 hectare. However, farms with less than 10 hectares make up 37 percent of the cultivated land and represent half the rural population (12 million out of 24) producing less than 10 percent of the marketed agricultural production. Farms over 10 hectares provide about three quarters of the market supply (Keshavarz et al. 2005).

History

Organic agriculture in Iran started within universities, and is taught in specific courses and lectures. The lectures of Professor Koocheki at Ferdowsi University of Mashad during the 1990s were especially important during this time. Subsequently in the mid-2000s, Ferdowsi University of Mashad and Shahid Beheshti University in Tehran established a Master program in Agroecology. In 2005, the Iranian Scientific Society of Agroecology (ISSA), an NGO, was established. Its main focus is on research and education in the field of organic farming. In 2006, the Iranian Organic Association (IOA) was established, focusing on marketing and trade. Both organizations have been the drivers behind the legislation of the national standard for organic farming.

Parallel to the interest for organic agriculture within the universities, the market began to develop. Certified organic products in Iran were first documented in 1999, when an orchard with roses for extracting essential oils in Kerman province was converted to organic. In 2006, another company in the Province of Farce was recorded to have exported organic

pomegranate, figs, dates, and medicinal herbs to the European Union, and the organic market has been growing rapidly since.

Legislation and certification

The “Organic Committee” under the Agricultural Ministry and the “Iranian Standard and Industrial Research Institute” are responsible for the organic legislation. In 2008, the latter passed the Iranian National Standard for Organic Products: ISIRI – 11000. The Iranian Scientific Society of Agroecology (ISSA) and the Iranian Organic Association (IOA) had active participation in the process of legislating the standard. In Article Number 143 of the fifth development plan (2011–2015), the development of organic farming is specified. However, there are no overall organic policies or direct support schemes for farmers to convert. Hence, some private market initiatives like the ‘Iran Association of Saffron’ is trying to develop the first national standards for organic saffron production and processing. In terms of certification, three international Certification Bodies are at the moment active in Iran: BCS (Öko-Garantie Germany), Control Union (The Netherlands) and the Soil Association (UK). Biosun Certifier Company is a local inspection body. It has entered into a partnership agreement with the international certification body bio.inspecta in Switzerland.

Present organic production base

As illustrated in Table 52, organic agriculture can be found in 11 out of Iran’s 31 provinces. More than half of the organic agricultural land is placed in the fertile Northern provinces, but only five percent (144) of the organic farms are located there. This means that the average farm size in this part of the country is 30 to 40 hectares. The remaining 95 percent of the organic farms (2’870) are concentrated in the Southern provinces, but with an average farm size of only 1.2 hectares. Hence, the organic sector of Iran resembles the conventional farm sector, but with a much higher concentration of very small farms.

Table 52: Iran: Distribution of organic farms 2010

Location	Provinces	Hectares	Number of farms	Major produce
North	Qom	120	1	Olives
	Golestan	30	1	Tomatoes
	Tehran	40	1	Apples
	Mazandaran	10	1	Rice
Center North	Esfahan	40	1	Pomegranate
	Markazi	1’172	28	Pistachio, peach
North East	Khorasan	1’653	50	Wheat, raisin, pistachio, potato, saffron
North West	East Azerbaijan	137	60	Apple
	West Azerbaijan	500	1	Carrot, alfalfa
South East	Kerman	2’068	1’470	Rose, walnut, dates, pistachio, safflower
South West	Fars	1’486	1’400	Medicinal herbs, pomegranate, fig, dates
Total	11	7’256	3’014	

Source: ESRI 2011

The organic agricultural land consists of 7’256 hectares of which 1’265 is in conversion. The wild collection area amounts to 40’700 hectares, and it is located in the three provinces of Fars, Kerman, and Khorasan. Main products are wild pistachio, herbs, and licorice.

Animal production is all concentrated in the province of Khorasan in Northeast Iran with 13'000 chickens, 3'000 sheep, 500 cows, 140 turkeys, and 50 geese. Poultry is often kept on wheat farms, which is a major organic product in terms of area.

In Table 53, the ten major organic products from Iran in terms of hectares occupied are listed. The economic value could not be obtained, which could alter the rank of the products. Famous Iranian products are also significant in organic production, including products such as pistachio, rose, dates, and pomegranate.

Table 53: Iran: Key organic products 2010

Product	Hectares
Pistachio	1'382
Wheat	1'156
Rose	900
Fig	780
Raisin	700
Date	595
Pomegranate	508
Walnut	500
Apple	125
Olives	120

Source: ESRI 2011

Markets

Local

As in many developing countries, the domestic market for organic products in Iran is still relatively small. However, local demand for organic products has been growing parallel with rising incomes and consumer awareness as well as concerns related to a number of food safety issues. It is typical for developing countries that the domestic organic market start of in the capital city with smaller outlets/health shops. These shops are usually located in residential areas that are inhabited by upper-middle class citizens (Sirieix et al. 2011; Kledal et al. 2009 & 2010). The same goes for Iran, where a number of organic products such as rice, honey, and olive oil are now occasionally available in a few outlets in some high-end residential areas in the northern part of Tehran. The market is not stable, however, and lacks a consistent supply of products. Also, quality and packaging need to be improved in order to lower both distribution costs and secure a growing consumer interest.

Export

More than 95 percent of the organic production in Iran is being exported. However, official statistics about export volumes and value are non-existent, and the private firms are very reluctant to inform or hand out information on these issues. Thirty-five companies are involved with exporting. They are all conventional, but they have started an organic product line. A majority of the companies are private intermediaries purchasing products from the farmers. There are also a few large farm enterprises specialized in pistachio, fully vertically integrated from production to export. The main importing countries of Iranian organic products are Germany, France, the UK, and The Netherlands (Mahmoudi & Damghani 2011).



Package of Iranian organic saffron

Picture: Hossein Mahmoudi 2010

Future prospects

Iran is in considerable need for private investments to modernize its agriculture, and it would be important to create new intersector linkage jobs in agro-industries and service. However, private investments will demand a more transparent and competitive economic system contrary, to the present dominant state-run economy characterized by “clientelism” and inefficient distribution systems. This leaves, on the one hand, the organic sector in a dire strait but on the other hand, it also offers valuable potential for the future. At present, it means growth is depending on personalities, and it is based on trust, commitment and risk seekers among farmers, intermediaries as well as agribusiness companies. The latter will often need to organize their business in vertical integration when many smallholders are to be included, since the costs of training and educating farmers in organic production methods will lie solely with the entrepreneurs. On the other hand, the requirements of a third party control integrity and transparency in organic production, leaves the organic sector with important expertise on producing sustainable food to modern urban markets under the country’s increasing environmental constraints.

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Relevant websites

- www.agroecology.ir: Website of the Iranian Scientific Society of Agroecology
- www.iranorganic.com: Website of the Iranian Organic Association
- www.bcs-iran.com: Website of the German certification body BCS in Iran (Persian language)
- www.organic-farming.persianblog.ir: Blog on organic farming in Iran
- www.biosuncertifier.com

Overview of Thai Organic Agriculture

VITON R. PANYAKUL¹

The year 2011 may seem to be another normal year for Thai organic agriculture, but the changes that took place in that year could signify profound changes for the future. Despite the global economic recession and domestic political polarization, the Thai organic sector continues to enjoy steady growth due to growing demand, both in export and domestic markets. This demand helps to encourage the conversion of more farmland to organic agriculture. This is especially the case for large-scale agro-industries that need to secure large volumes of organic raw materials for their processing facilities and thus convert their plantations into organic agriculture. This starkly differs from the past where the organic conversion occurred mainly with small-scale farmers. Meanwhile, Thai consumers, driven largely by health concerns, seem to enjoy a wider range of organic processed foods, thanks to the efforts of supermarket chains that have started stocking imported organic products. With the exception of the fresh produce sector, organic processed food products are currently dominated by imports. This also adds a new feature to the Thai organic markets. In the future, imports may even increase:

In his keynote speech at the Thai Organic and Natural Expo in August 2011, the newly appointed Minister of Commerce announced his intention to develop Thailand's organic market into one that is open to imports from the ASEAN countries—the Association of Southeast Asian Nations.² This marks a significant change from the current policy that is oriented towards export-driven organic production.

History

Thai organic agriculture is rooted in traditional farming, which has survived the “green revolution” introduced to Thailand in the 1970s. The resistant movement was spearheaded by local farmers and local non-government organizations (NGOs) who, since the early 1980s, came together to establish the Alternative Agriculture Network (AAN) to foster sustainable agriculture activism in Thailand. By the early 1990s, these NGOs pioneered the development of organic agriculture development in the country. They supported local farmers in adopting sustainable farming practices; they organized an alternative marketing scheme for small-scale farmers and initiated the organic standards and certification system. Parallel to these initiatives, some companies from the mainstream business sector, seeing the business opportunities in organic trade, initiated organic farming projects by converting their farms to organic agriculture or supporting their farmers to convert.

Production

Thai organic agriculture is at the beginning of the take-off stage. Both organic production and markets are starting to expand significantly and are becoming more complex. The development of the sector has capitalized the country's strengths by focusing on organic

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² The Association of Southeast Asian Nations (ASEAN) is a geo-political and economic organization of ten countries located in Southeast Asia, which was formed on 8 August 1967.

rice and vegetable production. The majority of organic producers are family farms organized under a grower group program or organic projects.

On organic farms in Thailand, jasmine rice is among the most grown crops. Jasmine rice is mainly exported—most of it to the European Union—and some is sold domestically. Vegetables are the second most important organic crops while organic fruits are third in place. The production of tea, coffee, and sugar is also expanding rapidly. There are also wild products such as honey and herbs. There is a growing number of certified aquaculture and organic livestock production units.

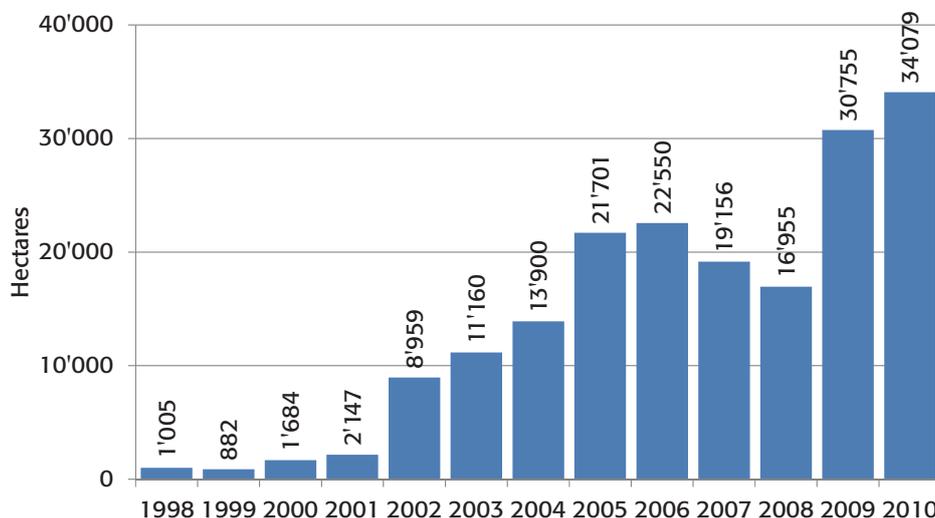


Figure 54: Thailand: Development of land under organic agricultural management 1998-2010

Source: Greennet

An estimated 7'405 farming families cultivate 34'079 hectares of certified organic land, and another 700 hectares are under wild harvest. This represents around 0.16 percent of the total agricultural land.

In the last few years, the Thai organic sector also witnessed an expansion of processed foods, using organic raw materials from within the countries or imports. However, these are mostly single-ingredient products.

Certification and Regulations

More than half of the organic farms are certified by foreign certification bodies; most of these are based in the European Union. There are three main local certification bodies, namely the Organic Agriculture Certification Thailand or ACT (a non-profit foundation), the Organic Crop Institute (Department of Agriculture), and The Northern Organic Standards Organization (private organization). Among the local, ACT is the only Thai certifier that offers internationally recognized organic certification services.

The National Office of Agricultural Commodity and Food Standards (ACFS), Ministry of Agriculture and Cooperative introduced the national organic standards in 2002 and

launched the national accreditation for organic certifiers in 2004. However, this remains a voluntary scheme, and only ACT has yet applied and been accredited by ACFS for its organic certification activities.

The National Office of Agricultural Commodity and Food Standards (ACFS) is keen to establish international recognition for its organic scheme. It has applied to the European Commission and the National Organic Program of the United States Department of Agriculture as well as established a dialogue with the Chinese authorities on bilateral recognition. However, there seems to be no progress on any of these points.

There are a couple of producer groups who use the Participatory Guarantee System (PGS) as an organic verification method. This is the case, for example, for organic vegetable growers in Chiang Mai and the organic farmers in Phangan Island.

Organic markets

So far, no systematic study on the Thai organic markets is available. Green Net, the main organic advocate in the country, estimates the organic market at 135.44 million US dollars for 2009, around half of which is sold domestically, and the other half is exported.

The three main marketing channels for organic products in the country are supermarket chains, specialized shops, and direct marketing (either farmer markets or membership schemes).

Supermarket chains are now the dominant retailers of organic products ranging from fresh products to meat and processed foods. Some fresh products are imported, for example, apple and kiwi, but the majority of imports are processed foods (imported as packaged products). A typical section of a conventional supermarket may have around 20 to 100 organic products on sale.

Specialized shops carry mainly products from domestic suppliers, but they tend to mix certified and non-certified organic products without clear identification or labeling. Consumers shopping in these shops often assume that all products available there are "green and healthy."

Direct marketing through farmer markets has gained popularity in recent years and a few sell through membership schemes. Direct marketing normally focuses only on fresh produce and rice.

Similar to other producer countries, the key challenge for Thai organic agriculture is the unfavorable economic environment for converting to organic agriculture. Rising prices of conventional agricultural products, climate change-induced supply fluctuations, the conversion of food crops to feed or biofuel crops, and the global economic downturn are all factors that are putting pressure on organic premiums. A more medium-term challenge for farmers is the difficulty in coping with climate variations, especially when it comes to choosing appropriate adaptation measure that could address the immediate problems and long-term risks. Few organizations offer concrete and practical support for climate change adaptation in Thailand. These challenges are likely to slow down the growth of the Thai organic sector in the short- and medium-term.

Organic Agriculture in Asia: Graphs

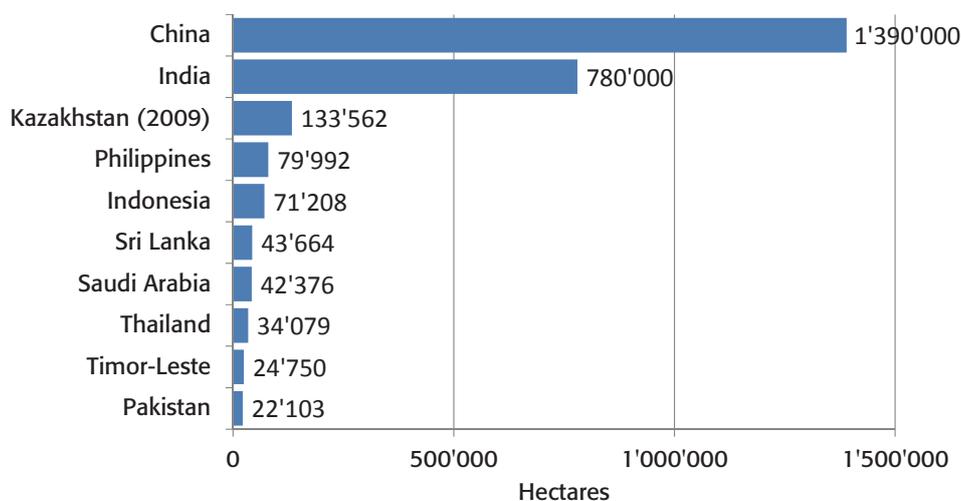


Figure 55: Asia: The ten countries with the most organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

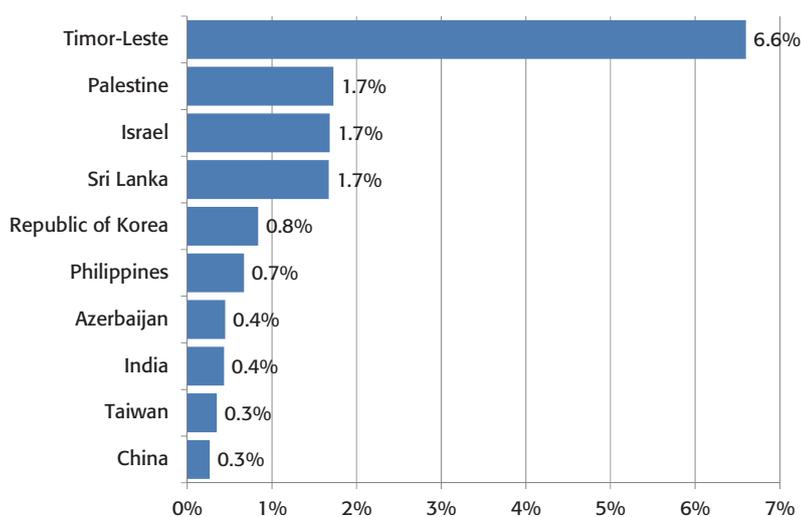


Figure 56: Asia: The ten countries with the highest percentage of organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

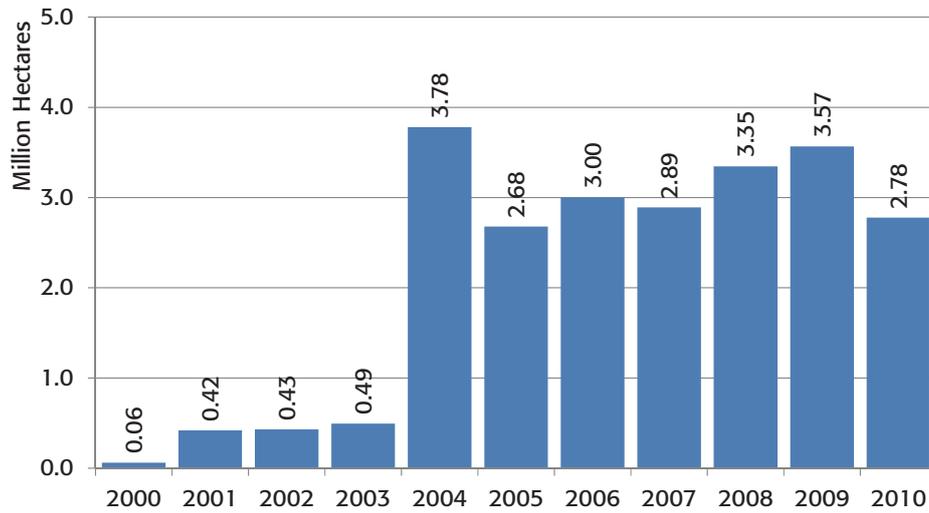


Figure 57: Asia: Development of organic agriculture land 2000 to 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

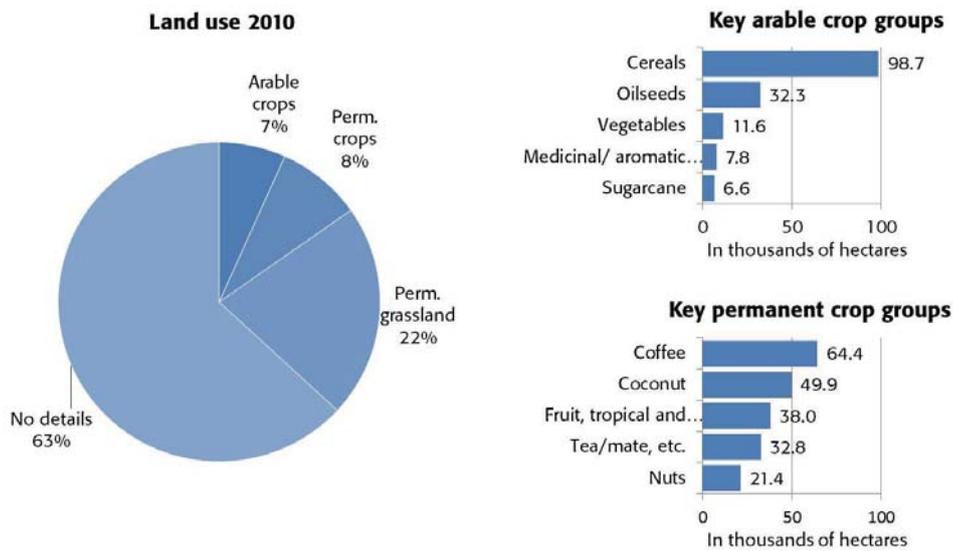


Figure 58: Asia: Use of organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Organic Agriculture in Asia: Tables

Table 54: Asia: Organic agricultural land, share of total agricultural land and number of producers 2010

Country	Area [ha]	Share of total agr. land	Producers
Afghanistan	61	0.00%	264
Armenia	750	0.04%	34
Azerbaijan	21'347	0.45%	288
Bangla Desh	799	0.01%	2
Bhutan	No data	0.00%	No data
Cambodia	8'084	0.15%	7'498
China	1'390'000	0.27%	No data
Georgia	1'401	0.06%	64
India	780'000	0.43%	400'551
Indonesia	71'208	0.13%	9'805
Iran (Islamic Republic of)	7'256	0.01%	3'014
Israel	8'794	1.68%	401
Japan	9'067	0.23%	2'137
Jordan	1'469	0.14%	42
Kazakhstan	133'562	0.06%	8
Kyrgyzstan	15'040	0.14%	987
Lao People's Democratic Republic	4'885	0.21%	2'178
Lebanon	1'227	0.18%	172
Malaysia	1'582	0.02%	24
Myanmar	60	0.00%	6
Nepal	9'789	0.23%	1'470
Occupied Palestinian Territory	6'354	1.73%	832
Oman	39	0.00%	4
Pakistan	22'103	0.08%	1'045
Philippines	79'992	0.67%	3'006
Republic of Korea	15'518	0.84%	10'790
Saudi Arabia	42'376	0.02%	62
Sri Lanka	43'664	1.67%	398
Syrian Arab Republic	19'987	0.14%	2'458
Taiwan	2'962	0.35%	1'277
Tajikistan	391	0.01%	75
Thailand	34'079	0.17%	7'405
Timor-Leste	24'750	6.60%	72
United Arab Emirates	360	0.06%	2
Uzbekistan	65	0.00%	6
Viet Nam	19'272	0.19%	4'385
Total	2'778'291	0.20%	460'762

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 55: Asia: All organic areas 2010

Country	Agri- culture [ha]	Aqua- culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Total*
Afghanistan	61					61
Armenia	750				500	1'250
Azerbaijan	21'347		109		399	21'855
Bangla Desh	799	7'717				8'516
Bhutan					15'604	15'604
Cambodia	8'084					8'084
China	1'390'000				900'000	2'290'000
Georgia	1'401				865	2'267
India	780'000				3'650'000	4'430'000
Indonesia	71'208	94			32'700	104'002
Iran	7'256				38'200	45'456
Israel	8'794					8'794
Japan	9'067			483		9'550
Jordan	1'469					1'469
Kazakhstan	133'562				1'300	134'862
Kyrgyzstan	15'040					15'040
Lao PDR	4'885					4'885
Lebanon	1'227					1'227
Malaysia	1'582					1'582
Myanmar	60					60
Nepal	9'789				24'922	34'711
Occupied Palestinian Territory	6'354					6'354
Oman	39					39
Pakistan	22'103					22'103
Philippines	79'992					79'992
Republic of Korea	15'518					15'518
Saudi Arabia	42'376					42'376
Sri Lanka	43'664					43'664
Syrian Arab Republic	19'987				8'000	27'987
Taiwan	2'962					2'962
Tajikistan	391					391
Thailand	34'079				701	34'780
Timor-Leste	24'750					24'750
United Arab Emirates	360					360
Uzbekistan	65				145'621	145'686
Viet Nam	19'272	11'650			2'565	33'487
Total	2'778'291	19'461	109	483	4'821'377	7'619'721

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 56: Asia: Land use in organic agriculture (fully converted and in-conversion) 2010

Main use	Crop category	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	1'725'303
Arable crops	Arable crops, no details	20'882
	Arable crops, other	6
	Cereals	98'690
	Green fodder from arable land	2'894
	Industrial crops	1'220
	Medicinal and aromatic plants	7'796
	Mushrooms and truffles	4
	Oilseeds	32'297
	Protein crops	71
	Root crops	852
	Seeds and seedlings	69
	Strawberries	8
	Sugarcane	6'639
	Textile crops	2'984
	Tobacco	13
	Vegetables	11'628
Arable crops total		186'053
Cropland, no details	<i>Cropland, no details</i>	28'151
Other agricultural land, total		449
Permanent crops	Citrus fruit	182
	Cocoa	2'225
	Coconut	49'908
	Coffee	64'406
	Flowers and ornamental plants, permanent	84
	Fruit, no details	1'196
	Fruit, temperate	6'683
	Fruit, tropical and subtropical	38'016
	Grapes	2'897
	Medicinal and aromatic plants, permanent	12'958
	Nuts	21'375
	Olives	729
	Other permanent crops	4'422
	Tea/mate, etc.	32'795
Permanent crops total		237'878
Permanent grassland total		600'457
Total		2'778'291

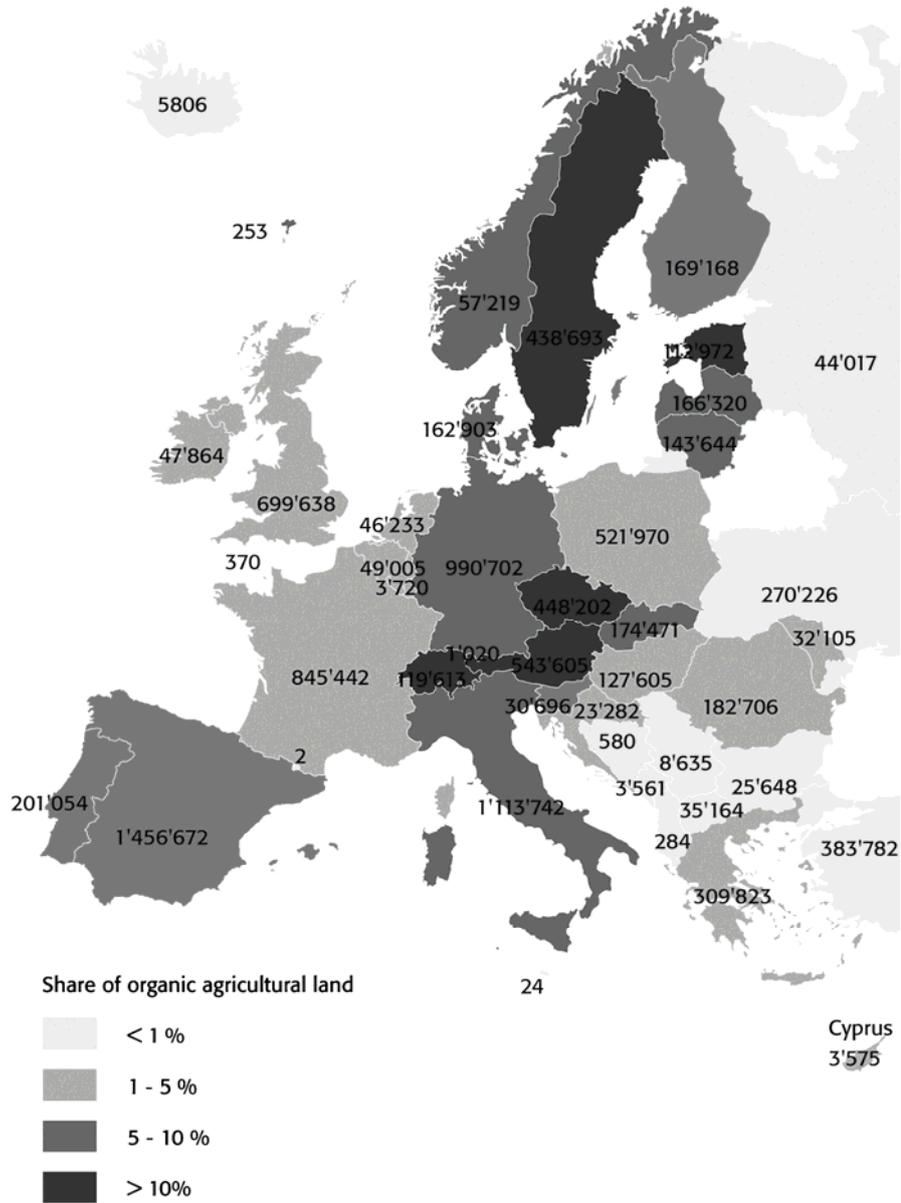
Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 57: Asia: Use of wild collection areas 2010

Category of crops harvested	Area [ha]
Beekeeping	12
Berries, wild	5
Forest honey	13'278
Fruit, wild	2'246
Medicinal & aromatic plants, wild	422
Medicinal and aromatic plants, wild	62'303
Nuts, wild	148
Palm sugar	12'422
Wild collection, no details	4'730'541
Total	4'821'377

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Europe



Map 4: Organic agricultural land in the countries of Europe 2010

Source: FiBL Survey 2012; based on information from the private sector, certifiers, governments, Eurostat and the Mediterranean Organic Agriculture Network. For detailed data sources see annex, page 307.

Organic Agriculture in Europe: Overview

HELGA WILLER¹

In 2010, organic land in Europe continued to increase and the organic market grew faster than in 2009. Provisional figures for 2011 indicate that these positive developments have continued. From the research side, there are also positive news: A number of new, important projects are being funded under the European Union's Research Framework programmes and by the network of national funding bodies under the CORE Organic II project.

Current statistics

Production

Organic agricultural land exceeded the ten million hectare mark in 2010: 10'002'087 hectares were under organic agricultural management in Europe, constituting 2.1 percent of the agricultural area. Compared with 2000 (4.5 million hectares), the organic land has more than doubled. Between 2009 and 2010, the area increased by almost 0.8 million hectares or nine percent. In the European Union, there were 9 million hectares in 2010, constituting 5.1 percent of the agricultural land. The country with the largest organic agricultural area is Spain (almost 1.5 million hectares), the country with the most producers is Italy. For more information about the European figures see data tables for Europe, page 228.

In 2010, 41 percent of all organic farmland was used for arable crops (4 million hectares) and 45 percent was grassland (4.5 million hectares), with ten percent (one million hectares) being used to grow permanent crops.²

Spain (780'000 hectares), Germany (530'000 hectares) and the United Kingdom (480'000 hectares) have the largest permanent **grassland/grazing areas**. To convert extensively used areas and grassland to organic farming requires relatively few changes in production and few investments. Therefore, the share of grassland is higher in organic farming than in conventional farming, where it accounts for about one third of the agricultural land (Schaack 2010). The key **arable crop** group is cereals: Nineteen percent of the European organic area is cereal production, amounting to 1.7 million hectares in total. Most cereals were grown in Germany (207'000 hectares), Italy (194'00 hectares), and Spain (166'000). Organic vegetables were grown on 112'000 hectares in 2010; key producing countries were Italy (28'000 hectares), the United Kingdom (16'000 hectares) and Germany (12'000 hectares). Ten percent of the organic farmland was used for **permanent crops**; most of this land is olives (367'000 hectares), grapes (192'000 hectares), and nuts (190'000 hectares).

Market

In 2010, the organic market continued to grow in Europe. While some countries such as the UK or Ireland were still affected by the financial crisis leading to stagnation or even decline, the organic market grew significantly in many European countries. First estimates indicate

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² Figures are rounded, for details please see Table 67.

that in 2011 the European markets grew yet again at a higher rate. The total value of the European organic market in 2010 was approximately 19.6 billion euros and overall growth rate eight percent. The largest markets were Germany, France, the UK, and Italy. The countries with the highest per capita spending were Switzerland, Denmark, and Luxembourg. In all surveyed countries (32 in total), consumers spent on average 28 euros for organic products. For more details see article by Schaack et al. on the European Market in this volume, page 206).

New research project to improve transparency of organic markets

In February 2012, the new European research project “OrganicDataNetwork” (European Data Network for Improved Transparency of Organic Markets) started, and it is expected that this will be a major step forward to improve European market data. The project aims to increase the transparency of the European organic food market through better availability of market information about the sector, thus meeting the needs of policy makers and actors involved in organic markets. This network will closely co-operate with the European Commission, Eurostat and statistical offices of Member States, using existing structures for collecting and processing data on the organic market and stimulating the development of new ones by adapting existing models. The partnership will act as coordinating centre between stakeholders, and will result in a proposal for the establishment of a permanent network to achieve collaboration on statistical issues regarding organic market data.¹

EU regulation on organic farming and related issues

European logo

Organic farming has had legal protection since the beginning of the 1990s with Council Regulation (EEC) No 2092/91. On July 20, 2007, a completely revised organic regulation was published, “Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91,” and it came into force on January 1, 2009. The new rules include the mandatory use of the EU organic logo on pre-packaged organic products. The logo can be accompanied by national or private logos. Since July 1, 2010, the organic logo of the EU has been mandatory on all pre-packaged organic products that were produced in any of the EU Member States and meet the necessary standards. The “Euro-leaf” design shows the EU stars in the shape of a leaf against a green background conveying the message: Nature and Europe.



Figure 59: European Union: Logo for organic products

A new ecolabel?

A decision of the European Union on whether an ecolabel should be launched for food, feed and drink products is expected in the first half of 2012. A feasibility study released in 2011 shows that relevant expertise and significant resources are needed before launching an ecolabel for food, feed and drink products in the European Union (EU). It was also found that potential consumer confusion with the organic label would call for awareness building campaigns, requiring additional financial resources. The EU ecolabel is a voluntary scheme

¹ Information on this project is available at the website of the European Commission: http://ec.europa.eu/research/bioeconomy/agriculture/projects/organicdatanetwork_en.htm

that forms part of the EU policy to encourage more sustainable consumption and production. To date, criteria for the EU ecolabel scheme has been developed for products in the non-food sector only.

List of control bodies

On December 6, 2011, the European Commission published the first list of control bodies recognised as implementing equivalent organic standards and control measures in third countries (EU regulation 1267/2011). The list includes 30 control bodies from around the world. From July 1, 2012, it will be possible to export products certified by these bodies directly to the European Union. Every year the European Commission will have a deadline of October 31 for application to be submitted by control bodies for recognition.¹ According to the International Organic Accreditation Services (IOAS), this regulation is a significant landmark in the regulation of international trade in organic products.

Government support

In the European Union, the current cycle of the Common Agricultural Policy (CAP)² is due to end in 2013. Discussions are now under way to reform the policy for the period 2014 to 2020.³ Under European Union's agri-environmental programs (Pillar II of the CAP, rural development), support has been granted to organic farming since the beginning of the 1990s. The European Group of the International Federation of Organic Agriculture Movements (IFOAM EU Group) believes that the current CAP needs a fundamental reform.⁴ According to the IFOAM EU Group, the CAP reform must respond proactively to the current environmental challenges, ensure the future supply of high quality food through sustainable resource use and play a decisive role in realizing equitable socio-economic development across rural communities.

A further important support measure for organic farming are organic action plans. In 2011, 26 countries and regions in Europe had an action plan (Gonzalvez et al. 2011), many of them with quantitative targets. Austria, for instance, aimed to have 20 percent organically managed agricultural land by the end of 2010—an aim that was almost achieved by mid-2010 when 19.7 percent of the agricultural land was organic. In 2004, the European Action Plan for organic food and farming was launched. The information campaign proposed in the plan (Action 1, a multi-annual EU-wide information and promotion campaign to inform consumers, public institution canteens, schools, and other key actors) was implemented in July 2008. The campaign website offers a wide-range of information on organic agriculture and numerous tools (e.g., pictures, flyers) to support the promotion of organic agriculture.

¹ Information and useful links are available at the website of the International Organic Accreditation Service (IOAS) at <http://www.ioas.org/euroeq.htm>.

² Switzerland and Denmark had introduced support schemes already in the 1980s, and in 1989 Germany introduced support for organic farming under what is known as the extensification program. With the EU's agri-environmental programs, this support was extended to all EU countries (since 1992). The type and amount of support provided within this program varies within the different EU Member States. Also, non-EU countries such as Switzerland and Norway have similar support schemes.

³ Detailed information on the Common Agricultural Policy after 2013 is available at the website of the European Commission at http://ec.europa.eu/agriculture/cap-post-2013/index_en.htm.

⁴ Information on the Common Agricultural Policy of the European Union (CAP) and the position of the IFOAM EU Group is available at http://www.ifoam.org/about_ifoam/around_world/eu_group-new/workareas/policy/php/CAP.php

Research

Today, organic farming research is substantially funded under national research programs or national organic action plans, as well as through European projects.¹ Even though no figures for all European countries are available, it is known that the funds of the eleven countries that are part of the ERA-Net project CORE Organic² amounted to more than 60 million euros in 2006 (Lange et al. 2007). Newer data are not available.

Since the mid-1990s, several organic farming research projects have been funded under the framework programs of the European Commission. Furthermore, there are several European projects that do not have organic farming as their focus but carried out research related to organic farming in the framework of individual work packages. In the Seventh Framework Programme, launched in 2008, currently eight projects focusing on organic farming that are being funded. Below is a list with the main projects:

- OrganicDatanetWork: Data network for better European organic market information (starting 2012)
- Co-Free: Innovative strategies for copper-free low input and organic farming systems (starting 2012)
- SOILIBAM - Strategies for organic and low-input integrated breeding and management (www.solibam.eu)
- CERTCOST (www.certcost.eu): Economic analysis of certification systems for organic food and farming;
- LowInputBreeds (www.lowinputbreeds.org): Development of integrated livestock breeding and management strategies to improve animal health, product quality and performance in European organic and "low input" milk, meat and egg production;
- Organic Sensory Information System (OSIS) (ww.ecropolis.eu): Documentation of sensory properties through testing and consumer research for the organic industry (www.ecropolis.eu);
- Indicators for biodiversity in organic and low-input farming systems (BioBio, www.biobio-indicator.wur.nl/UK)
- CORE Organic II - Coordination of European Transnational Research in Organic Food and Farming Systems (www.coreorganic2.org)

CORE Organic II (Coordination of European Transnational Research in Organic Food and Farming Systems) started in April 2010 and it builds on the outcome of the first CORE Organic project —successfully completed in 2007—with the aim of building an effective and sustainable transnational research program. CORE Organic is a network of funding bodies and has 21 partner countries. CORE Organic's goal is to identify common research priorities for the organic sector where a transnational approach gives added value, launch at least two transnational calls, initiate research projects, organize project monitoring and dissemination of results, and to consider funding models. A call for proposals was launched

¹ For a list of projects funded by the European Commission see <http://www.organic-research.org/european-projects.html>

² CORE Organic (Co-ordination of European Transnational Research in Organic Food and Farming); Internet www.coreorganic.org. CORE Organic was a three-year coordination action in organic food and farming (2004 to 2007).

The overall objective was to gather a critical mass and enhance quality, relevance and utilization of resources in European research in organic food and farming.

It is succeeded by the CORE Organic II project.

late summer 2010, and eleven projects were selected, covering three thematic organic research areas: Cropping, monogastric animals and quality.¹ A second call was launched in autumn 2011 with two main focus areas (breeding and market development).

In February 2010 the Strategic Research Agenda (SRA), the second major document of the Technology Platform TP Organics (www.tporganics.eu)² was finalized, underlining research priorities and a number of suggestions for research projects (Schmid et al. 2009). The Implementation Action Plan explains how the research priorities and research topics, identified in the Strategic Research Agenda, can be implemented. A focus is laid on funding instruments, research methods, and communication of results (Padel et al. 2010). Many of the topics covered in these documents were taken into consideration in recent European calls. Currently, the Technology Platform TP Organics is working on the Education & Innovation Action Plan paper, a guide for education in the field of agriculture. The document establishes the strategic framework to appraise current education projects and subsequently enhance agricultural education outcomes by offering suggestions for improvement.

Successful policy work of the IFOAM EU Group

The European Group of the International Federation of Organic Agriculture Movements (IFOAM EU Group) can look back on another year of successful policy work. The activities of the group are very well documented in its monthly newsletter.³

Its work focuses on three areas:

- Regulation - to work on the implementation and evaluation of the EU organic regulation EC 834/2007 according to IFOAM standards;
- Agricultural policy - to achieve an effective European organic action plan and to lobby for a more sustainable Common Agricultural Policy;
- Research – to make lobby work for organic farming research as coordinator of the Technology Platform for organic food and farming and to participate in relevant research projects, especially in the dissemination of results.

The European Organic Congresses of the IFOAM EU Group have now become a tradition. The 5th congress took place in Hungary in May 2011. The next congress of the IFOAM EU Group is organized in cooperation with Organic Denmark. It will take place in Copenhagen, Denmark, April 17-18, 2012. With 200 participants expected, including high-level speakers from the European Commission, the European Parliament and the European organic sector, the 6th European Organic Congress will take place at a crucial point in time for the debate on the future Common Agricultural Policy (CAP).⁴

¹ Information on CORE Organic II is available on www.coreorganic2.org.

² On December 2, 2008, the Technology Platform (TP) Organics (www.tporganics.eu) was launched with a public presentation in Brussels. The platform joins the efforts of industry and civil society in defining organic research priorities and defending them vis-à-vis policy-makers. The TP Organic vision paper, published in December 2008, reveals the huge potential of organic food production to mitigate major global problems, from climate change and food security, to the whole range of socio-economic challenges in the rural areas (Niggli et al. 2008).

³ The newsletter of the IFOAM EU Group is available at http://www.ifoam.org/about_ifoam/around_world/eu_group-new/positions/newsletters/newsletters.php

⁴ Information on the congress is available at <http://www.organic-congress-ifoameu.org/>

Further reading

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- www.organic-europe.net: Organic Europe, maintained by FiBL: Country reports, address database, statistics
- www.organic-market.info: Organic Market Info: Market News and updates: www.organic-market.info
- www.organic-world.net: Organic World (maintained by FiBL): Statistics, country information, news
- www.tporganics.eu: Technology Platform TP Organics

The Organic Market in Europe

DIANA SCHAACK¹, JULIA LERNOUD², SUSANNE PADEL³, AND HELGA WILLER⁴

In 2010, the organic market continued to grow in Europe, particularly in Belgium, Austria, Italy, the Netherlands, and Sweden. While some countries were still affected by the financial crisis leading to stagnation or even decline (e.g., Ireland, United Kingdom, and Norway), the organic market grew significantly in many other European countries. First estimates indicate that in 2011, the European markets grew again at a higher rate.

The European Market in 2010

AMI and FiBL estimate that the total value of the European organic market in 2010 was approximately 19.6 billion euros.

The largest markets were Germany, France, the UK, and Italy. As in previous years, Denmark, Austria, and Switzerland had the highest market shares (as a percentage of total retail sales, and the countries with the highest per capita spending were Switzerland, Denmark, and Luxembourg (see Table 58; Figure 60 and Figure 62). In all surveyed countries (32 in total), the per-capita consumption for organic products was 28 euros.

It remains difficult to compare the European estimate with the published data for the previous year, as individual countries may revise their estimates after publication date. Again, Italian data had to be revised also for historical figures. Based on a comparison of 2010 data with records for 2009, it is estimated that the European market grew by approximately eight percent between 2009 and 2010, indicating that some confidence has returned (Figure 63). It is expected that a new project on Organic Market Data starting in February 2011 funded by the European Commission will help improve data availability and quality in the future.⁵

In 2010, sales grew faster in many countries than in the previous year. In several countries including Austria, Belgium, France, Italy, and the Netherlands, the market grew by more than ten percent. In these countries, consumers turned their awareness towards nutrition and the origin of their food. Sales also increased in Denmark and in Germany, albeit at a much lower rate. The largest European market, Germany, grew by **two** percent. Growth was due to successful marketing strategies in natural food stores, while demand in the supermarkets stagnated. The Danish market noted a growth of nearly four percent. However, some countries were still affected by the financial crisis, with the market declining further in 2010. In Ireland, the United Kingdom, and Norway, the markets decreased in value between nine and three percent. Market values were not only affected by

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⁴ Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Ackerstrasse, 5070 Frick, Switzerland, www.fibl.org

⁵ Information on this project is available at the website of the European Commission: http://ec.europa.eu/research/bioeconomy/agriculture/projects/organicdatanetwork_en.htm

sales volumes, but also by rising prices, especially in the second half of the year. Small harvests for many plant products may potentially have hampered growth. For animal products, demand grew faster than supply in many countries, and thus producer and consumer prices started to rise again.

Trends 2011

With the improvement of the general economic conditions and increasing consumer awareness of their food, the growth that started already in the second half of 2010, continued considerably in 2011 and organic products were again experiencing notable sales increases. In 2011, prices rose considerably after two low harvests for many crops, so it is likely that the limiting factor for market growth could again be supply. In some countries, a shortage of supply for cereals and some vegetables is expected for the first half of 2012. Overall, it is estimated that market development in 2011 across Europe resulted in single digit growth rates for sales volumes and a bigger growth rate for the market sales values.¹

For 2011, market actors expect an on-going growth of the organic market in many countries. In Germany, growth rates are estimated at slightly under ten percent for 2011. The Dutch announced a market growth of 27 percent in the first three quarters of 2011. For the first half of 2011, Italy and France published growth rates of 11 and 10 percent. In Denmark and Finland, double-digit growth rates are again expected. Also, in the United Kingdom a smaller decrease than in previous years is expected.

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¹ Figures for 2012 will be available in the first half of 2011. They will be reported at www.organic-world.net.

Graphs

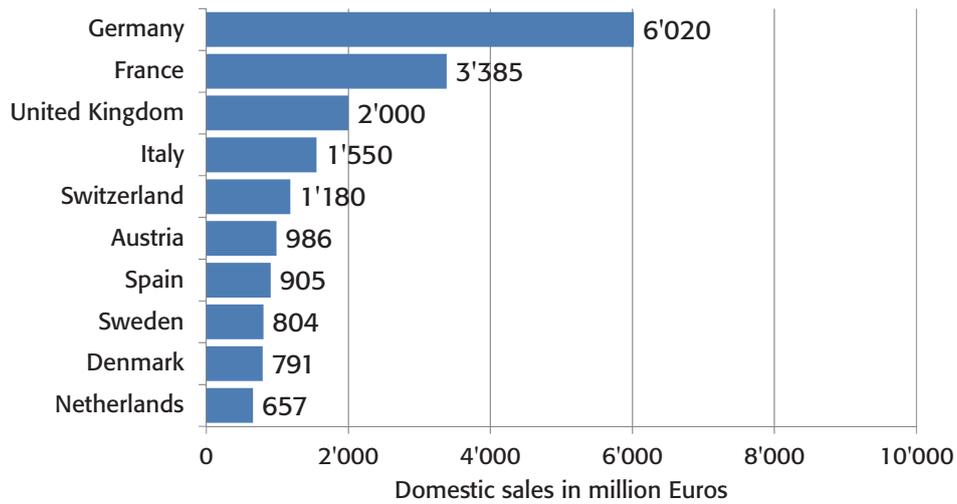


Figure 60: Europe: The ten countries with the largest markets for organic food and beverages 2010

Source: FiBL-AMI Survey 2012. For data sources see annex.

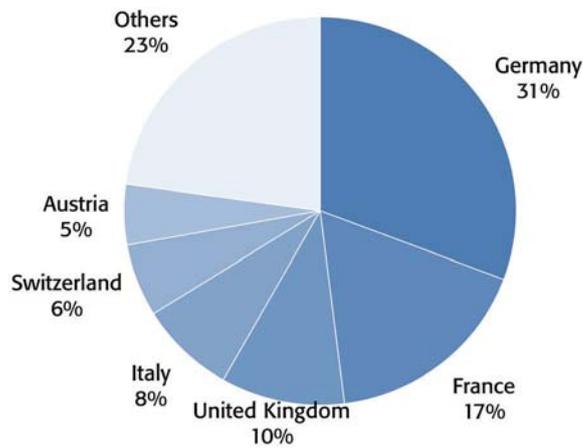


Figure 61: Europe: Distribution of organic food sales 2010

Source: FiBL-AMI Survey 2012. For data sources see annex.

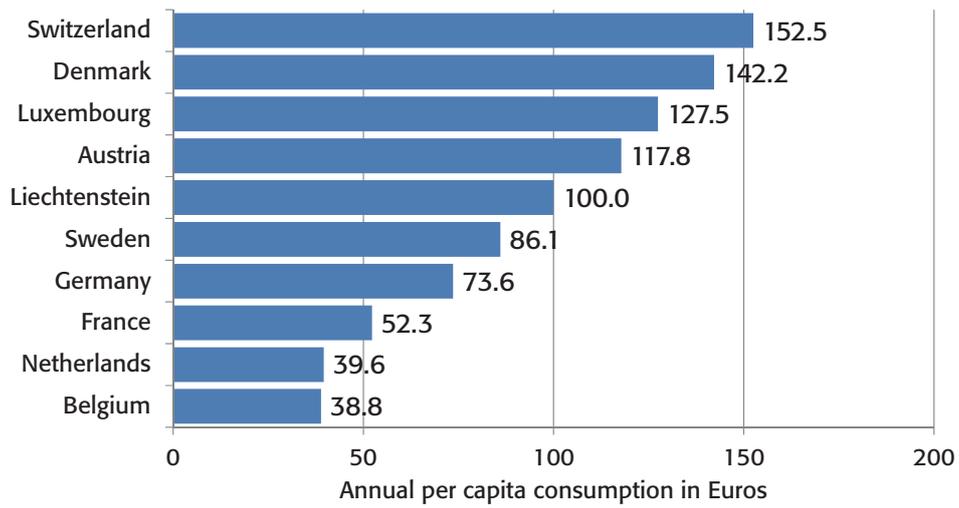


Figure 62: Europe: The ten countries with the highest per-capita consumption 2010

Source: FiBL-AMI-Survey 2012. For data sources see annex.

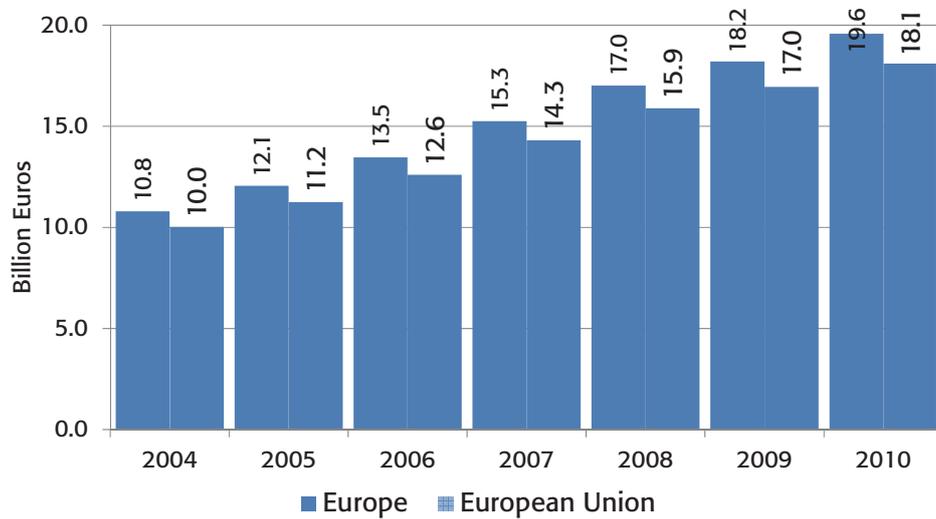


Figure 63: Europe and European Union: Market development 2004-2010

Source: FiBL-AMI Survey 2012. For data sources see annex.

Table: The European market for organic food**Table 58: Europe: The market for organic food 2010**

Country	Data year	Sales [Mio €]	€/ person	Growth 1 year [%]	Share [%]	Cater- ing [Mio €]	Export [Mio €]	Import [Mio €]
Austria	2010	986.0	117.8	13.6	6 (2009)	59.7	75.9	
Belgium	2010	421.0	38.8	20.3	1.8			
Bosnia and Herzegovina	2008						1.3	
	2010	1.0	0.1					
Bulgaria	2010	7.0	0.9					
Croatia	2010	69.2	15.6	87.0	1.0		4.4	37.8
Cyprus	2006	1.5	1.9					
Czech Republic	2008						4.0	32.0
	2009	68.3	6.5		0.8			
Denmark	2010	791.0	142.2	3.4	7.2	70.0	115.0	172.9
Estonia	2007							3.5
	2009	11.8	8.8		1.0			
Finland	2009						14.0	19.0
	2010	80.0	14.9	6.7	2.0			
France	2010	3'385.0	52.3	10.8	2.0			1'194.0
Germany	2009					300.0		
	2010	6'020.0	73.1	2.0	3.5			
Greece	2006	58.0	5.2					
Hungary	2009	25.0	2.5		0.3	0.1	20.0	18.0
Ireland	2010	103.2	23.1					
Italy	2010	1'550.0	29.8	14.8		250.0	1'050.0	
Liechtenstein	2009	3.4	100.0					
Luxembourg	2010	65.0	127.5					
Montenegro	2010	0.1	0.2					
Netherlands	2007						525.0	
	2010	656.5	39.6	13.1	2.7	92.6		
Norway	2010	112.9	23.5	-3.1				
Poland	2010	58.9	1.5		0.1			
Portugal	2010	21.0	2.1	0.0				
Romania	2010	45.0	2.1					
Russian Federation	2009	65.0	0.5				4.0	30.0
Serbia	2010	40.0	5.5					
Slovakia	2010	4.0	0.7					
Slovenia	2009				1.0	0.1	0.1	23.0
	2010	38.0	18.6					
Spain	2009	905.0	19.5		1.0		454.0	190.0
Sweden	2010	803.8	86.1	6 ¹	4.1			
Switzerland	2010	1'180.1	152.5	6.1	5.7			
Turkey	2009	3.6	0.1				19.8	
Ukraine	2010	2.4	0.1					
United Kingdom	2010	2'000.0	32.2	-5.9		17.9		

Source: FiBL-AMI Survey among a number of data sources; for sources see next page and annex.

¹ If catering is included growth was 11 percent.

Note on table

- Blank cells: no information available
- Where no published data exists, best estimates from a range of experts have been used, but these were not available for all cases, so sometimes earlier estimates are shown.
- Values published in national currencies were converted to Euros using the 2010 average exchange rates.
- Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.
- For details on data sources please see annex.
- Corrections, revisions and updates can be sent to helga.willer@fiBL.org
- Corrections and revisions will be posted at www.organic-world.net

Sources

Austria: Bio Austria, Roll-AMA; Belgium: Bioforum; Bosnia and Herzegovina: Ecozept; Bulgaria: Bioselena; Croatia: Darko Znaor; Cyprus: Ecozept; Czech Republic: Ministry of Agriculture and Institute of Agricultural Economics and Information (MZE/ÚZEI); Denmark: Danish Agriculture and Food Council (LF); Estonia: Estonian Organic Farming Foundation EOFF; Finland: Organic Market Info; Organic Food Finland; France: Agence bio; Germany: AMI, the Agrarian Market Information Company; Greece: Ecozept; Hungary: Biokorsar Survey; Ireland: Board Bia; Italy: AssoBio/Pinton Organic Consulting; Liechtenstein: Klaus Büchel Anstalt; Luxembourg: BioLabel; Montenegro: Ecozept; Netherlands: LEI, Bio-Monitor; Norway: SLF; Poland: GTAI; Portugal: INTERBIO; Romania: Business Review; Russian Federation: Eco-Control survey; Serbia: Ecozept; Slovakia: Ecozept; Slovenia: Institute for Sustainable Development (ISD); Spain: Ministry of Agriculture, MARM; Sweden: Statistics Sweden (SCB)/KRAV; Switzerland: Bio Suisse; Turkey: Ministry of Agriculture, estimate; Ukraine: Organic Federation of Ukraine; United Kingdom: Soil Association

Organic Imports to Germany

DIANA SCHAACK¹, CHRISTINE RAMPOLD², HELGA WILLER³, AND MARKUS RIPPIN⁴

Germany is not only the largest market for organic products in Europe but also one of its largest organic producers. In spite of this fact, in 2009/2010 Germany imported, depending on the product, 2 to 95 percent of such organic products which could also have been produced in the country.

This is shown by a project under the German Federal Scheme for Organic Farming and Other Forms of Sustainable Agriculture (BÖLN), carried out by the Agricultural Market Information Company (AMI) (www.ami-informiert.de), the Research Institute of Organic Agriculture (FiBL) (www.FiBL.org) and the market research company Agromilagro (www.agromilagro.de).

Data analyzed

Determining organic export data turned out to be extremely different as organic external trade data is not separately collected in the official statistics. That is why under this project, four different types of data were analyzed and synthesized:

- GfK-household panel data were analyzed for those products, for which retailers have to display the country of origin (fruit, vegetables, potatoes, and eggs).
- External trade data were used from those companies that had agreed that their data be used.
- Project partners surveyed about 50 importers in Germany and a few exporters in a number of countries.
- Furthermore, production and area data as well as data on import and export volumes were ascertained or estimated for the EU countries and the relevant countries worldwide.

Results

Cereals

An unexpected result was the low import share of cereals of only 15 percent. In 2009—the year investigated—harvest in Germany was higher than on average and, therefore, it is assumed that the import share in other years was higher. Wheat had the highest import share of 21 percent. The import share varies according to quantity, quality, and price level

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of the German harvest; however, there is a large potential for an increase of production in Romania, Russia, Ukraine, and Slovakia.

Protein crops

For protein crops, the import share of 24 percent was unexpectedly high. These imports will become even higher once the legal requirement of 100 percent organic feed has been implemented. In this context, soybeans, usually classified as oilseeds, are important. They account for 76 percent of all organic oil seed imports. The cultivation of this crop, even though feasible in Germany, is not easy. There is clear potential for further expansion.

Fodder crops

The availability of fodder crops has an effect on pig and poultry production, which entails high costs for fodder and investments, even though the demand for organic pork can by far not be met. Beef is imported in small quantities only; it can thus not be counted as an import product.

Eggs

As to eggs, German producers have a hard time keeping up with the strong growth in demand. In spite of the high costs for feedstuffs in 2010, the domestic market grew to 80 percent and has potential for further growth.

Potatoes

Organic fresh potatoes are, by volume, among the most important organic fresh products, after organic eggs and organic fresh vegetables. They held a market share of 4.7 percent in 2010. In 2009, the import share was 28 percent. It will probably remain at that level, as the organic area expanded considerably already at the end of the 1990s and retailers prefer to offer imported potatoes in the early potato season. Therefore, the project team does not expect much change regarding the imports of early potatoes.

Vegetables

As regards vegetables, organic carrots are by far the most sold product and are grown on 14 percent of the carrot area in Germany. As the individual farms cannot expand the areas cultivated with carrots, Germany imports 48 percent of its organic carrots. In order to increase German production, additional producers would need to use additional small areas. The high import rates of fruit vegetables such as tomatoes (80 percent) and peppers (90 percent) are due to the all year round demand for products that can only be grown in season in Germany. As regards vegetables from protected cropping, the demand for regional produce is high, so that a further expansion is possible.

Fruit

Organic bananas and apples are the best-sold organic fruit products. Organic bananas have, naturally, an import rate of one hundred percent. The import rate for organic apples was also high at 50 percent in 2009/2010. However, during that time the organic apple area in Germany expanded to 3'000 hectares and now constitutes 9 percent of the apple area in Germany. Therefore, it can be expected that, under the right weather conditions, German production will increase and the import share will decrease.

Dairy products

Germany imports 26 percent of its fresh organic milk and 26 percent of its organic butter, most of it coming from Denmark and Austria. The import share for cheese is probably in a similar range. Other products such as yoghurt and cream originate from Germany—at a rate of almost one hundred percent. Sixteen percent of milk is imported when calculated in milk volumes (without consideration of the cheese imports). It would be possible to expand German production, but there will always be competition with the two main suppliers Denmark and Austria, both of which produce surpluses.

Main supplying countries

For Germany, the biggest suppliers of organic cereals are Italy, Russia, Kazakhstan, Romania, and Slovakia. Regarding protein crops (fodder peas, field beans, lupines), Lithuania plays by far the most prominent role, with almost half of the imports coming from there. For oilseeds including soybeans, Romania and Italy are the most important suppliers. However, several countries outside Europe (Kazakhstan, Argentina, India, and Brazil) are beginning to play an increasingly important role for soybean imports. Potatoes are mainly imported from Israel, Egypt, and Austria. The Netherlands are an important supplier of carrots, onions, eggs, and pork. Fruit vegetables mainly come from Spain and Italy. Israel supplies larger quantities of potatoes, tomatoes, and peppers. Italy supplies one third of the apples sold in Germany. The bananas imported are mainly from the Dominican Republic, Ecuador, and Costa Rica.

In many of the above-mentioned countries, areas are under conversion, and thus further products can be expected for the international market from there. Already now, Germany is relying on these imports, in particular for products that can be produced here only with difficulties or that can only be seasonally produced. For many livestock products such as eggs, milk, and pork, German consumption is currently higher than production. If enough and cheaper feedstuffs were available, there would be significant potential for these products. When looking at the data for the first three quarters of 2011 and consumer trends in 2011, the organic market is likely to continue to grow at high rates.

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Table 59: Germany: Organic production, imports and import shares 2009/2010

Product	Imports in metric tons	German production in metric tons	import share in %	Main countries of origin
Cereals	114'000	667'000	15	
- Wheat	70'000	185'000	27	Italy, Kazakhstan, Romania, Hungary, Russia, Slovakia, (Ukraine)
- Maize	18'000	25'000	42	Romania, Italy, Slovakia, Hungary
- Spelt	10'000	80'000	11	Italy, Slovakia, Hungary
- Rye	8'000	200'000	4	Lithuania, Austria, Latvia, Russia
- Barley	11'300	89'000	11	Russia
- Rice	3'500	-	100	Italy, India, Pakistan
- Oats	1'600	82'000	2	Finland, Denmark, Sweden
Protein Crops	14'600	45'000	24	
- Field beans	2'400	14'300	14	Lithuania, Romania
- Field peas	10'000	16'400	38	Lithuania, Russia, Slovakia
- Lupines	1'000	13'700	7	Lithuania, Poland
- Lentils	340	-	100	Canada, Turkey
Oil seeds	41'640	13'000	76	
- Soy beans	19'000	1'400	93	Italy, Romania, Kazakhstan, India, Argentinian, Brazil
- Sunflower kernels	11'000	2'050	84	Romania, Brazil, Argentina, China
- Linseed	5'200	300	95	Canada, Argentina, China, Russia
- Sesame	640	-	100	Egypt, Uganda
- Rape seed	5'000	10'000	33	Romania, Russia, Kazakhstan, Hungary
Potatoes	38'000	100'000	28	Austria, Israel, Egypt, Netherlands
Vegetables				
- Carrots	47'000	50'000	48	Netherlands, Israel, Italy
- Tomatoes	18'000	4'000	82	Spain, Netherlands, Italy, Israel
- Sweet peppers	5'900	600	91	Spain, Israel, Netherlands
- Onions	4'500	8'500	35	Netherlands, Argentina, Egypt
- Cucumbers	4'600	4'500	51	Spain, Netherlands, Bulgaria
Strawberries	1'100	2'280	33	Spain, Italy
Fruit				
- Apples	26'000	26'000	50	Italy, Austria, Argentina, New Zealand
- Bananas	72'000	-	100	Colombia, Ecuador, Dom. Rep.
Pork	7'000	24'400	22	Netherlands, Austria, Denmark, Italy
Sugar	2'500	49'000	5	Brazil, Paraguay, Ecuador
Eggs (Million pieces)	97	383	20	Netherlands, Italy
Milk	97'000	545'500	15	Denmark, Austria

Source: AMI, FiBL, Agromilagro, 2011

Bulgaria: Boom of Organic Agriculture

STOILKO APOSTOLOV¹

Recent developments

Considerable growth occurred in organic farming between 2009–2010 in Bulgaria. The certified land doubled between 2009 and 2010. During this time, the number of operators (producers, processors, exporters, importers) increased by 76 percent and the highest growth was seen for cultivated oilseeds, which increased fourfold. The area for medicinal and aromatic plants and nuts increased by more than 50 percent, and the cereal and vegetable area doubled.

Milestones in the development of organic farming Bulgaria

- **1993: The first organic pilot farm** (8 hectares) was established on the farm at the Agrarian University of Plovdiv.
- **1996–2000: First intensive activities in the development of organic farming** in Bulgaria, such as trainings for farmers, publication of literature, and the preparation of the national legislation. The project “Development of organic farming in the Central Balkan Region” was financed by the Swiss Agency for Development and Cooperation (SDC) and implemented by the Research Institute of Organic Agriculture (FiBL) and Bioselena (www.bioselena.com).
- **2000–2004: First steps in organic farming in Bulgaria took taking place.** The establishment of a national organic legislation (Ordinance 22 and Ordinance 35), the first national organic farming festival, the first farm certification; in 2003, Bulgaria participated for the first time at the BioFach Organic Trade Fair; in 2004, the first specialised organic shop in Sophia was established.
- **2005–2008: Organic products became available in Bulgarian shops.** In 2005, organic foods appeared for the first time in the supermarkets of Sofia; in 2007, organic foods became available for the first time in shops outside Sofia; in 2008, the organic boom begins with more than 1'500 shops selling organic products; the first TV advertisement for organic food also appeared during this time.
- **2009–2010: Economic crisis and consolidation of the sector:** Organic farmers began receiving payments from the government; the association of organic farmers was established; the association of traders of organic food was set up; organic agriculture in Bulgaria begins developing into a real economic sector.

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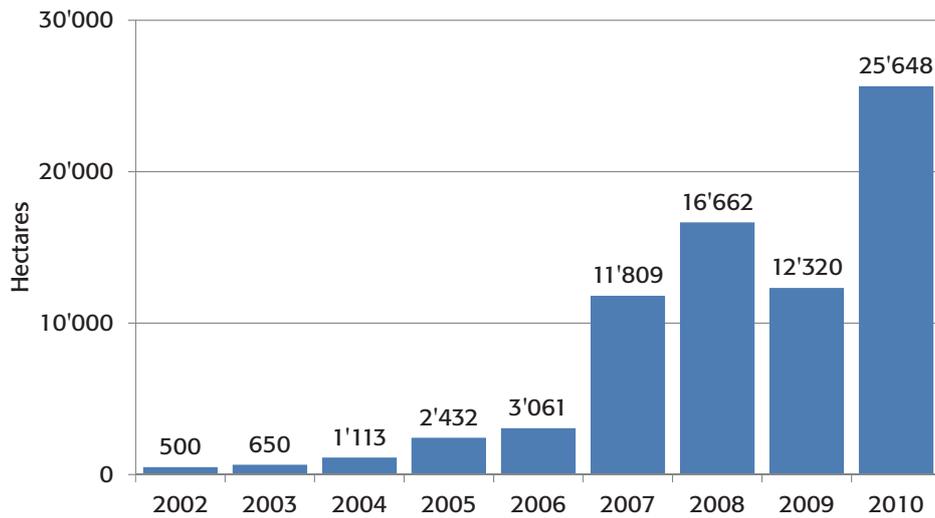


Figure 64: Bulgaria: Development of organic agricultural land in Bulgaria 2002–2010

Sources: Data for 2002, 2003, 2004 and 2005: Bioselena. Data for 2006-2010: Ministry of Agriculture and Food of Bulgaria

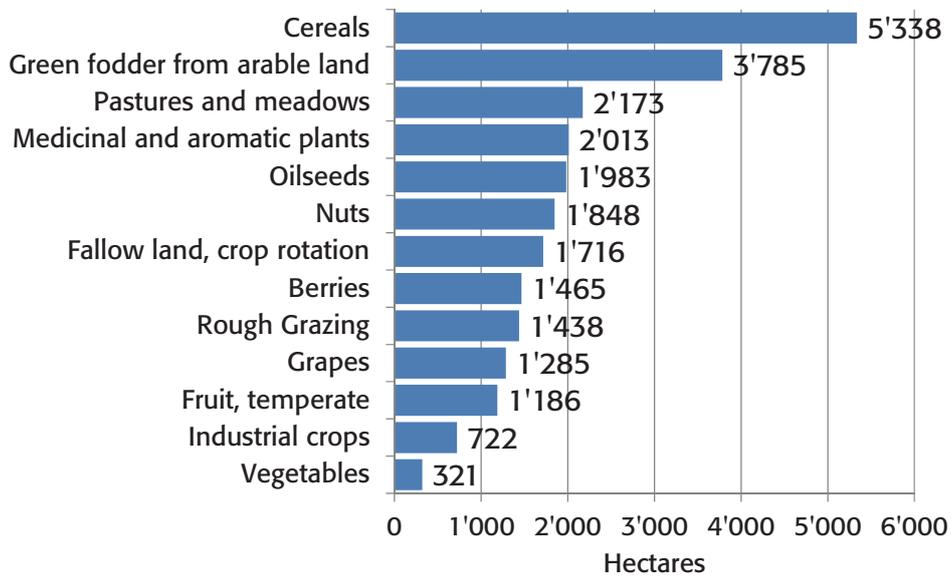


Figure 65: Bulgaria: Key crops grown 2010

Source: Ministry of Agriculture Bulgaria

Production and operator data

At the end of 2010, 25'648 hectares were farmed organically, constituting 0.47 percent of the total usable farmland in Bulgaria. Important crops cultivated were aromatic and medicinal plants, small fruits, and nuts.

Furthermore, there are large areas certified for the collection of wild fruit, herbs and mushrooms.

Organic animal breeding was still underdeveloped in 2010, with only a small number of certified farms and animals. Organic apiculture had 46'429 beehives under organic management at the end of 2010.

Bulgaria has ten control and certification authorities for organic farming. Only one of them is a Bulgarian company, the latter having the largest market share.

Key institutions/organizations

- The Ministry of Agriculture and Food, Organic Farming Unit of the Directorate Plant Production has four employees in this unit. The key role of the directorate is the supervision of the work of the control bodies.
- The Commission Organic Farming to the Minister of Agriculture and Foods, consists of representatives of manufacturers, traders in organic products, research and consulting organizations and structures of the Ministry. The scope of activity of the commission is to approve the control authorities in the country as well as to take decisions regarding the duration of the transition period.
- The State Fund Agriculture accepts and processes applications to support organic farmers, carries out spot checks of the farms and is in charge of the payments.
- The Bulgarian Organic Products Association is a national organic association with members consist mainly of producers and processing units. It was established in 2010.
- The Association of Organic Traders has twenty-one businesses as members (mainly importers).
- The Foundation for Organic Farming „Bioselena” offers professional advice for producers and processing units of organic foods, as well as professional training in organic farming. It issues literature in organic farming in the Bulgarian language, promotes organic agriculture among farmers and policy-makers, as well as organic foods among consumers.
- The Agrarian University of Plovdiv offers master degree courses in organic farming and is the only university in Bulgaria to do so. It also has a nine-hectare organic farm.

Market and trade

Most of the organic products (about 90 percent) are exported to the Central and Western European countries, North America, and Japan. There are no official data on exports.

The local market has been developing rapidly since 2007. Bulgaria now has over 2'000 shops that sell organic foods. The market leaders are baby foods and dairy products (milk, yoghurt, cheese). There are no official statistics on sales. According to unofficial information, the market for organic products in Bulgaria ranges between six to eight million euros. About 90 percent of organic products marketed in Bulgaria is imported from the European Union. There are no imports from third countries.

Legislation

The “Law on the application of the general organizations of the agricultural product markets in EU” settles organic farming in Bulgaria. The terms “bio”, “eco”, and “organic” are protected by law, but only for food, produced in compliance with the organic farming requirements.

Detailed rules for the production, processing, and labelling are laid down in the European regulation No. 834/2007 of June 28, 2007. Some of the certification authorities offer certification according to private standards as well (Bio Suisse for example).

Government support / development cooperation

Government support is limited to financially supporting certain crops for a period of five years. The support is granted under Measure 214 of the Rural Development Program (Table 61).

Research, advice and training

Specialised consulting organizations, such as Bioselena, offer advice to farmers against payments. Some of the researchers also offer consulting services. The traders of fertilizers and plant protection products also offer advice.

The Agrarian University of Plovdiv offers a facultative academic program of 30 hours for students, as well as master degree programs in organic farming. Bioselena offers professional training in organic agriculture for farmers.

Links

- www.mzh.government.bg/mzh/en/Home.aspx: Ministry of Agriculture and Food
- www.prsr.government.bg/index.php/en: Rural Development program 2007-2013
- www.dfz.bg/en: State Fund Agriculture
- www.bgbio.org: Bulgarian Organic Products Association
- www.abt-bulgaria.org: Association of organic traders
- www.bioselena.com/en: Foundation for organic agriculture Bioselena
- www.au-plovdiv.bg/en: Agricultural University of Plovdiv

Tables

Table 60: Bulgaria: Development of the number of control bodies and operators, organic agricultural land & wild collection area, and beehives in Bulgaria 2002–2010

	2003	2004	2005	2006	2007	2008	2009	2010
Control bodies¹	2	2	2	2	6	10	10	10
Certified operators²	29	51	111	181	339	285	467	820
Certified organic land (hectares)	650	1'113	2'432	3'061	11'809	16'662	12'320	25'648
Areas for collection of wild plants (hectares)	-	-	-	110'143	397'835	397'835	401'426	546'195
Certified animals	-	-	-	1'514	3'101	4'565	8'939	9'952
Certified beehives	-	-	-	708	35'747	44'861	41'089	46'429

Sources: Data for 2002, 2003, 2004 and 2005: Bioselena. Data for 2006-2010: Ministry of Agriculture and Food of Bulgaria

Table 61: Bulgaria: Support for organic farming under the Rural Development Programme (Euros per hectare and year, rates since December 20, 2011)

Crops	Transition EUR/ha/year	Converted EUR/ha/year
Meadows and pastures	120	120
Field crops, including fodder crops	250	197
Perennial plants, vineyards and roses (<i>Rosa Damascena</i>)	729	613
Aromatic and medicinal plants	448	327
Vegetables³	547	446
Bee hives	18.4	18.4

Source: Ministry of Agriculture Bulgaria

¹ Control bodies, accredited by the Ministry of Agriculture and Food

² Certified operators (producers, processors, exporters, and importers)

³ Including cultivated mushrooms and potatoes

Organic Farming in Turkey and the Contribution of Buğday to the Sector's Development

GIZEM ALTIN NANCE¹

In Turkey, documented organic farming began during 1984-1985 with the traditional export products of dried raisins and figs. In about a decade, the variety of organic export items had reached approximately 250. Today, almost all of the production is exported to developed countries, mainly EU, the US and Japan. Most of the organic production is geared towards exports. In most cases, traders commission the farmers to produce a specific product.

Although there are no statistics available for the domestic consumption of organic products in Turkey, we know that it is relatively low. The main challenge is the lack of demand and marketing opportunities. This is where Buğday Association comes in.

Buğday's Contribution to the development of the organic sector in Turkey

Buğday is a grassroots movement, and it has been operating officially since 2002 under the name of "Buğday Association for Supporting Ecological Living." The Buğday magazine was the first publication of ecological living in Turkey and was also the first publication to talk about what "organic" is. The magazine was followed by a big PR move initiated by the PR professionals in the Bugday team, providing solid information to the national Turkish media by combining traditional knowledge and information from renowned organic organizations, such as the International Federation of Organic Agriculture Movements (IFOAM).

In 2006, Bugday founded the first organic farmers' market of Turkey in Şişli, one of the districts of Istanbul together with the local municipality. The first organic farmers' market allowed the organic producers to sell their products directly to consumers. Before the market in Şişli was established, many of them had to sell their produce at the conventional markets, which was not sustainable. Today, there are several organic farmers' markets in Turkey, five of them founded and supervised by Buğday. However, the Şişli organic farmers' market remains the role model and the heart of the organic movement.

Table 62: Turkey: Sales volumes of fresh products on the Şişli farmers' market

Year (always month of June)	Sales volume the first week of June
June 2006	3 metric tons
June 2007	4-5 metric tons
June 2008	6-8 metric tons
June 2009	9-11 metric tons
June 2010	12-15 metric tons
June 2011	12-16 metric tons

Source: Buğday

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The Şişli farmers' market opened in June 2006 with 25 suppliers and 48 stalls. Today, there are 60 suppliers at 260 stalls. Since 2010, approximately 600 tons of fresh fruits and vegetables are sold every year on the Şişli farmers' market. The market is visited by about 1 500 visitors every Saturday.

Table 63: Turkey: Şişli farmers' market: Suppliers' profile 2010

Supplier type	Number
Total number of suppliers'	59
Food, import, packaged brand suppliers	9
Producers	37
Traders	13

Source: Buğday

It is of significance that the farmers' market retains its place mainly as a "producers' market" as opposed to a traders' market. We value that the consumers buy directly from the producers themselves.

Today, the farmers' markets that are founded by Buğday host a variety of organic certified products, ranging from fresh produce to packaged foods, textiles, cosmetics, cleaning supplies etc. They are closely inspected and supervised by Buğday's team of agricultural engineers. The farmers' markets host concerts, workshops, seminars and ecological movie screenings continuously, thus creating an ecological haven for city dwellers.

History of the Buğday movement

- 1990: First market and research on whole some food in Bodrum, Turkey,
- 199: Health food store opens as the base and meeting point for the organic movement in Bodrum,
- 1992: The store is transformed into a restaurant and an education center which serves as a national and international meeting point and base for the next eight years.
- 1998: First bi-monthly Buğday Ecological Living Magazine is published and distributed in the country.
- 1999: First congress on "Healthy domestic organic market" organized.
- 2000: Different models for the marketing of organic products are established.
- 2002: Buğday Association is legally established as the umbrella organization for the movement.
- 2003: TaTuTa organic farm holidays and volunteer program established.
- 2005: First community supported organic city garden project carried out.
- 2006: First 100% ecological farmers' market was established in İstanbul, Turkey.
- 2007: Project for the preparation of an agri-environment programme for Turkey starts, funded by the Ministry of Agriculture, the Ministry of the Environment and the Ministry of Cultural Affairs.
- 2008: Turkey's seed network founded.
- 2009: Camtepe rural research and education center successfully completed (opened in 2010).
- 2010: First international permanent representation established in Brussels

- 2011: The founder of Buğday Association, Victor Ananias, passed away. Buğday was shaken, but did not stir from its path. At the 17th Organic World Congress of the International Federation of Organic Agriculture Movements (IFOAM) in the Republic Korea, it was decided that Buğday carries out the 18th Organic Word Congress.¹ The congress will take place in October 2014 in Istanbul.

Tables and graphs

In 2010, Turkey had almost 400'00 hectares or one percent of its agricultural land under organic agricultural management (including conversion areas). The number of producers has reached almost 45'000. A large part of production is dedicated to arable land, with cereals constituting the main crop category. Permanent crops play also a prominent role, with olives being the main group. Of the organic land under organic management about one fifth is fully converted. The big increase in the number of organic farms and of organic land is a result of a support programme aimed to increase organic production. It was implemented by the Turkish Ministry of Agriculture. The monetary support that was distributed to the farmers was, however, area-based and not production/output-based. Therefore, vast areas were converted to organic production but this production was not for the market.

Even though the organic area has grown substantially since 2009, exports dropped dramatically in 2010, mainly because of the lack of marketing strategies and the insufficient development of export products. Because of the instability of the organic produce supply, some overseas buyers moved on to other markets.

Table 64: Turkey's organic export figures

Year	Amount (Kilograms)	Value (US dollars)
1998	8'616'687	19'370'599
1999	12'049'949	24'563'892
2000	13'128'934	22'756'297
2001	17'556'280	27'242'407
2002	19'182'859	30'877'140
2003	21'083'351	36'932'995
2004	16'093'189	33'076'319
2005	9'319'328	26'230'259
2006	10'374'493	28'236'617
2007	9'346'677	29'359'321
2008	8'628'790	27'260'473
2009	7'565'604	27'504'928
2010	3'592'925	15'879'571

Source: Ministry of Food Agriculture and Animal Husbandry

¹ The bidding proposal is available at the IFOAM website
http://www.ifoam.org/events/ifoam_conferences/general_assembly/IFOAMBidDocument_Bugday.pdf

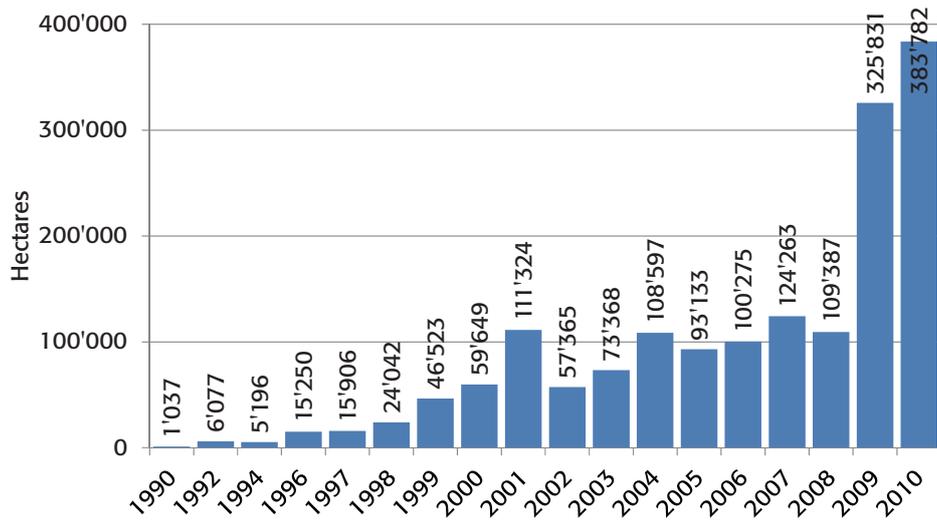


Figure 66: Turkey: Development of the organic agricultural land 1990-2010 (includes in-conversion areas)

Source: Ministry of Food Agriculture and Animal Husbandry for data from 2002, FiBL-SÖL Surveys for data before 2002

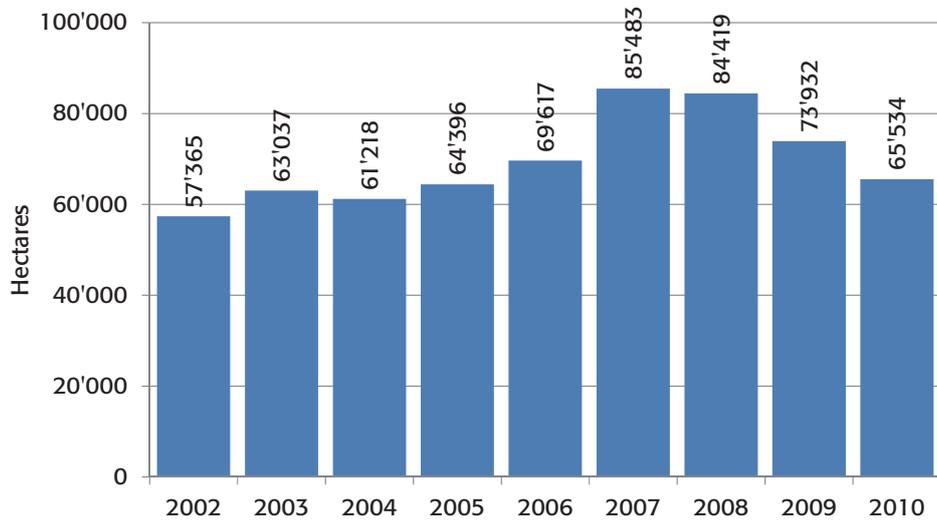


Figure 67: Turkey: Development of the fully converted organic agricultural land 1990-2010

Source: Ministry of Food Agriculture and Animal Husbandry

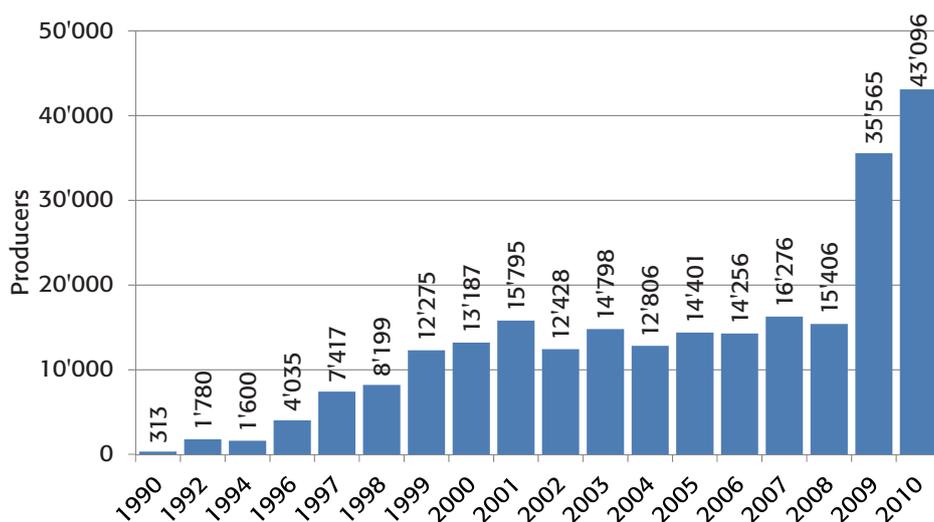
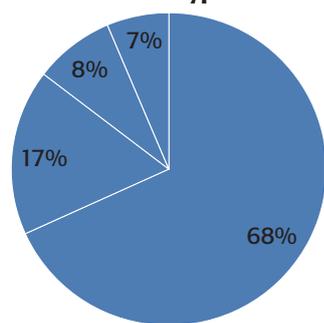


Figure 68: Turkey: Development of the organic producers 1990-2010

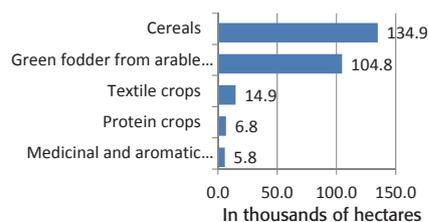
Source: Ministry of Food Agriculture and Animal Husbandry for data from 2002, FiBL-SÖL Surveys for data before 2002

Main land use types 2010



- Arable crops
- Permanent crops
- Permanent grazing
- Other agricultural land

Key arable crops



Key permanent crops

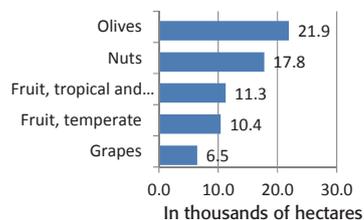


Figure 69: Turkey: Land use and main crops 2010 (including in-conversion areas).

Source: Ministry of Food Agriculture and Animal Husbandry

Organic Agriculture in Europe: Graphs

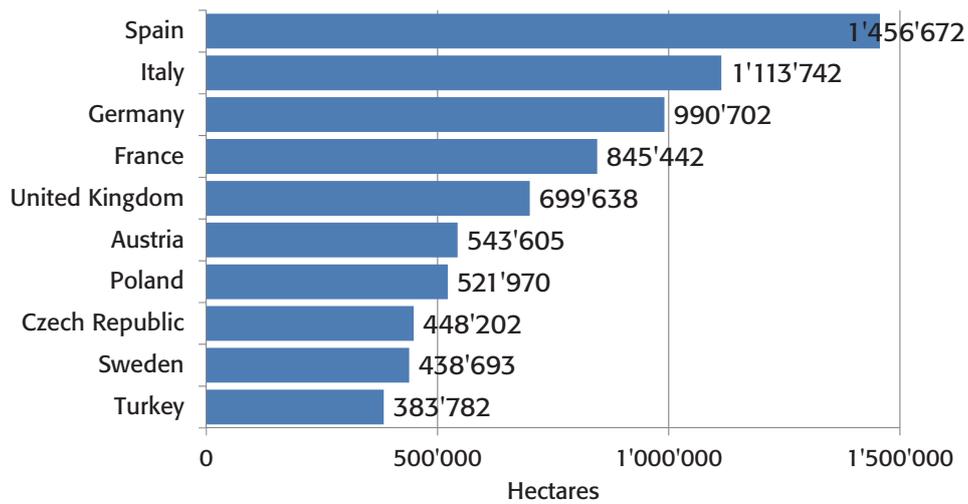


Figure 70: Europe: The ten countries with the most organic agricultural land 2010
 FiBL Survey 2012, based on national data sources and Eurostat. For data sources see annex.

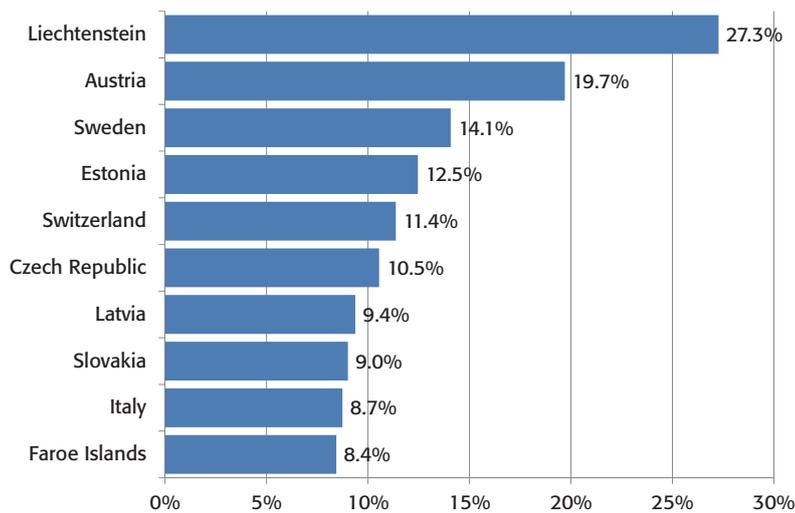


Figure 71: Europe: The ten countries with the highest shares of organic agricultural land 2010
 FiBL Survey 2012, based on national data sources and Eurostat. For data sources see annex.

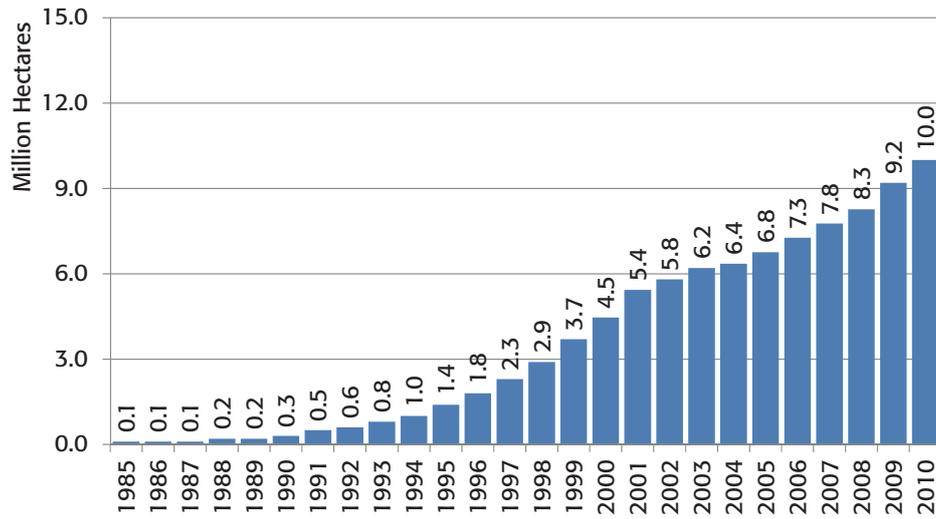


Figure 72: Europe: Development of organic agricultural land 1985-2010

Source: Lampkin, Nic and FiBL, based on national data sources and Eurostat. For data sources see annex.

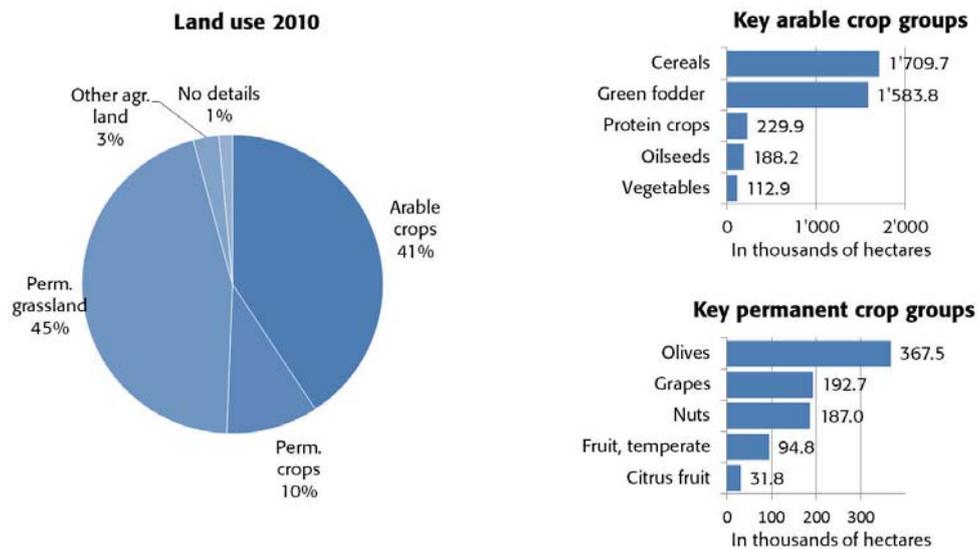


Figure 73: Europe: Use of agricultural land 2010

Source: FiBL Survey 2012, based on national data sources and Eurostat. For data sources see annex.

Organic Agriculture in Europe: Tables

Table 65: Europe: Organic agricultural land, share of total agricultural land and number of producers 2010

Country	Area [ha]	Share of total agr. land	Producers
Albania	284	0.02%	110
Andorra	2	0.01%	1
Austria	543'605	19.69%	22'132
Belarus	No data	0.00%	No data
Belgium	49'005	3.57%	1'108
Bosnia and Herzegovina	580	0.03%	27
Bulgaria	25'648	0.84%	709
Channel Islands	370	4.20%	No data
Croatia	23'352	1.80%	1'125
Cyprus	3'575	2.45%	732
Czech Republic	448'202	10.55%	3'517
Denmark	162'903	6.12%	2'677
Estonia	112'972	12.46%	1'356
Faroe Islands	253	8.43%	1
Finland	169'168	7.38%	4'022
France	845'442	3.08%	20'604
Germany	990'702	5.93%	21'942
Greece	309'823	3.74%	21'274
Hungary	127'605	3.02%	1'617
Iceland	5'806	0.25%	38
Ireland	47'864	1.16%	1'366
Italy	1'113'742	8.74%	41'807
Latvia	166'320	9.38%	3'593
Liechtenstein	1'020	27.27%	31
Lithuania	143'644	5.42%	2'652
Luxembourg	3'720	2.84%	96
Malta	24	0.23%	11
Moldova	32'105	1.30%	166
Montenegro	3'561	0.69%	62
Netherlands	46'233	2.40%	1'462
Norway	57'219	5.53%	2'805
Poland	521'970	3.37%	20'578
Portugal	201'054	5.79%	2'434
Romania	182'706	1.33%	2'986
Russian Federation	44'017	0.02%	50
Serbia	8'635	0.17%	3'887
Slovakia	174'471	9.01%	363
Slovenia	30'696	6.28%	2'218

Country	Area [ha]	Share of total agr. land	Producers
Spain	1'456'672	5.85%	27'877
Sweden	438'693	14.07%	5'208
Switzerland	119'613	11.4%	5'989
The former Yugoslav Republic of Macedonia	35'164	3.28%	542
Turkey	383'782	1.58%	43'096
Ukraine	270'226	0.65%	142
United Kingdom	699'638	4.34%	4'949
Total	10'002'087	2.06%	277'362
<i>European Union</i>	<i>9'016'097</i>	<i>5.1</i>	<i>219,431</i>

Source: FiBL Survey 2012, based on national data sources and Eurostat. For data sources see annex.

Table 66: Europe: All organic areas 2010

Country	Agriculture [ha]	Forest [ha]	Grazed non-agricultural land [ha]	Wild collection [ha]	Other non-agricultural land [ha]	Total [ha]
Albania	284			251'717		252'001
Andorra	2					2
Austria	543'605					543'605
Belarus						
Belgium	49'005					49'005
Bosnia and Herzegovina	580			220'000		220'580
Bulgaria	25'648			546'194		571'842
Channel Islands	370					370
Croatia	23'352			7'000		30'352
Cyprus	3'575		261			3'836
Czech Republic	448'202					448'202
Denmark	162'903					162'903
Estonia	112'972		8'842			121'815
Faroe Islands	253					253
Finland	169'168			7'800'224		7'969'392
France	845'442					845'442
Germany	990'702					990'702
Greece	309'823					309'823
Hungary	127'605					127'605
Iceland	5'806	288		212'439		218'533
Ireland	47'864					47'864
Italy	1'113'742					1'113'742
Latvia	166'320					166'320
Liechtenstein	1'020					1'020
Lithuania	143'644					143'644
Luxembourg	3'720					3'720

Country	Agriculture [ha]	Forest [ha]	Grazed non-agricultural land [ha]	Wild collection [ha]	Other non-agricultural land [ha]	Total [ha]
Malta	24					24
Moldova	32'105			2'080		34'185
Montenegro	3'561			101'801		105'362
Netherlands	46'233					46'233
Norway	57'219					57'219
Poland	521'970					521'970
Portugal	201'054	9'977				211'031
Romania	182'706			77'294		260'000
Russian Federation	44'017			2'180'040		2'224'057
San Marino						
Serbia	8'635			817'128		825'763
Slovakia	174'471					174'471
Slovenia	30'696					30'696
Spain	1'456'672			181'757		1'638'429
Sweden	438'693					438'693
Switzerland	119'613		6'121		5'727	131'461
The FYRO Macedonia	35'164			556'600		591'764
Turkey	383'782			126'251		510'033
Ukraine	270'226			280'000		550'226
United Kingdom	699'638					699'638
Total	10'002'087	10'265	15'224	13'360'526	5'727	23'393'828

Source: FiBL Survey 2012, based on national data sources and Eurostat. For data sources see annex.

Table 67: Europe: Land use in organic agriculture 2009 and 2010

Land use	Crop group	2009 [ha]	2010 [ha]
Agricultural land and crops, no details total		132'736	143'742
Arable crops	Arable crops		
	Arable crops, no details	9'969	34'630
	Arable crops, other	59'224	55'468
	Cereals	1'719'130	1'709'704
	Flowers and ornamental plants	209	175
	Green fodder from arable land	1'394'447	1'583'831
	Hops	216	228
	Industrial crops	11'178	14'864
	Medicinal and aromatic plants	42'578	48'468
	Mushrooms and truffles	48	
	Oilseeds	153'158	188'248
	Protein crops	162'013	229'910
	Root crops	38'847	53'738

Land use	Crop group	2009 [ha]	2010 [ha]
	Seeds and seedlings	187	5'425
	Strawberries	2'786	3'110
	Textile crops	10'324	17'641
	Tobacco	25	51
	Vegetables	103'204	112'894
Arable crops total		3'707'543	4'058'385
Cropland, no detail		-89'323	39'341
Other agricultural land		313'504	276'965
Permanent crops	Berries	19'809	26'096
	Citrus fruit	39'919	31'760
	Fruit, no details	113	87
	Fruit, temperate	72'237	94'812
	Fruit, tropical and subtropical	15'927	11'973
	Fruit/nuts/berries	3'181	61
	Grapes	167'146	192'671
	Medicinal and aromatic plants, permanent	896	2'400
	Nurseries	461	492
	Nuts	166'305	187'034
	Olives	363'504	367'463
	Other permanent crops	157'968	68'933
	Tea/mate, etc.	269	
Permanent crops total		1'007'746	983'783
Permanent grassland total		4'131'393	4'499'872
Total		9'203'600	10'002'087

Source: FiBL Survey 2012, based on national data sources and Eurostat. For data sources see annex.

Table 68: Europe: Use of wild collection areas 2010

Crop group	Area [ha]
Berries, wild	7'834'583
Fruit, wild	1'813'426
Medicinal and aromatic plants, wild	155'825
Mushrooms, wild	413'140
Nuts, wild	423
Seaweed	200'000
Wild collection, no details	2'943'130
Total	13'360'526

Source: FiBL Survey 2012, based on national data sources. For data sources see annex.

Organic Agriculture in the Mediterranean Region: Updates

LINA AL BITAR, MARIE REINE BTEICH, PATRIZIA PUGLIESE¹

Structural aspects and trends

Since 2006, an overview chapter on organic statistics and trends in the Mediterranean region has appeared in this book, based on official data supplied by the Ministries of Agriculture from the countries of the Mediterranean Organic Agriculture Network (MOAN). Alternative sources were used for Bosnia and Herzegovina (BiH) because of the absence of official data. For Cyprus and Greece, where contacts are in progress for the finalization of the MOAN partnership, data from Eurostat were used.

Table 69 reports the organic agricultural area, the total organic area (including wild collection and forests), and the number of organic operators in each country of the Mediterranean as well as the totals of these categories by subregion: the Mediterranean countries of the European Union (EU Med), candidate & potential candidate countries to the EU (CPC), and Southern & Eastern Mediterranean countries (SEM).

In 2010, there were approximately 6.5 million hectares of organic land (agriculture and wild collection), and almost 170'000 operators in the Mediterranean region. The EU Mediterranean countries hold the highest share of both the organic agricultural areas (85 percent) and the total organic areas (65 percent) (see Figure 74).

It is well known that in the candidate & potential candidate countries and the Southern & Eastern Mediterranean countries, the official statistical figures differ from other sources and in many cases do not cover the entire certified areas. Many efforts have been made in several CPC and SEM countries in the last three to four years to organize the data collection. The countries invested in human resources and they are working on making it compulsory for the control bodies to communicate their data to the competent authority (usually the Ministry of Agriculture). However, several difficulties persist, notably for the organic wild collection areas and their products. These areas are often overestimated or totally excluded from the official data. It is crucial to take this into consideration when analyzing the organic statistical data for the Mediterranean.

Keeping the above mentioned in mind, it is noteworthy to highlight that, in a span of five years (2006–2010), the organic agricultural area has been experiencing steady growth in the Mediterranean as a whole, at the level of the EU Mediterranean and the Southern & Eastern Mediterranean countries (SEM). Only in the candidate & potential candidate countries (CPC) there was a slight drop in organic agricultural areas registered in 2008, mainly due to the adjustment of data collection and classification (see Figure 76, Figure 75).

¹ Mediterranean Agronomic Institute of Bari CIHEAM-MAIB, Via Ceglie 9, 70010 Valenzano, Italy.

Table 69: Mediterranean countries: Organic statistics in the EU Mediterranean countries, the candidate & potential candidate countries and the Southern & Eastern Mediterranean countries (SEM) (2010)

Subregion	Country	Organic agricultural area 2010 [ha]	Total organic area ^(a) 2010 [ha]	Number of organic operators 2010
EU Med. Countries	Cyprus(b)	3'184	3'184	732
	France	845'442	845'442	31'062
	Greece (c)	309'823	309'823	n.a.
	Italy	1'113'742	1'113'742	47'663
	Malta	24	24	14
	Portugal	210'981	210'981	2'434
	Slovenia	30'696	30'696	2'333
	Spain	1'433'420	1'650'866	33'723
	EU Med	3'947'312	4'164'758	117'961
Candidate & potential candidate Countries (CPC)	Albania¹	4'536	6'686	131
	Bosnia & Herzegovina (d)	580	220'580	27
	Croatia (e)	23'282	23'282	1'125
	FYROM (f)	35'164	267'314	562
	Montenegro	3'561	105'362	67
	Serbia²	4'289	9'295	134
	Turkey	383'782	510'033	43'670
	CPC	455'194	1'142'552	45'716
Southern & Eastern Med. Countries (SEM)	Algeria	623	1'626	81
	Egypt	82'167	82'167	n.a.
	Jordan	1'469	1'469	42
	Lebanon	1'227	1'227	172
	Morocco	17'030	635'230	120
	Palestinian Authority	6'354	6'354	832
	Syria	19'987	27'987	2'458
	Tunisia	175'066	403'155	2'487
SEM	303'922	1'159'215	6'192	
Total Med	4'706'428	6'466'525	169'869	

^(a) Includes wild collection areas, grazed area on non-agricultural land and forests when present

^(b) Source: Eurostat database 2010

^(c) Source: Eurostat database 2011

^(d) Source: FiBL-IFOAM survey 2010

^(e) No official data are available on wild collection

^(f) FYROM: Former Yugoslav Republic of Macedonia

Source: Mediterranean Organic Network (MOAN)/IAM Bari

¹ Editors' note: The MOAN figure differs from the figure communicated in the other tables in this book. The FiBL-IFOAM data are based on a survey among the certifiers in the country by Albinspect.

² Editors' note: The MOAN figure differs from the figure communicated in the other tables in this book. The FiBL-IFOAM data are based on a survey by GIZ among all certifiers in the country.

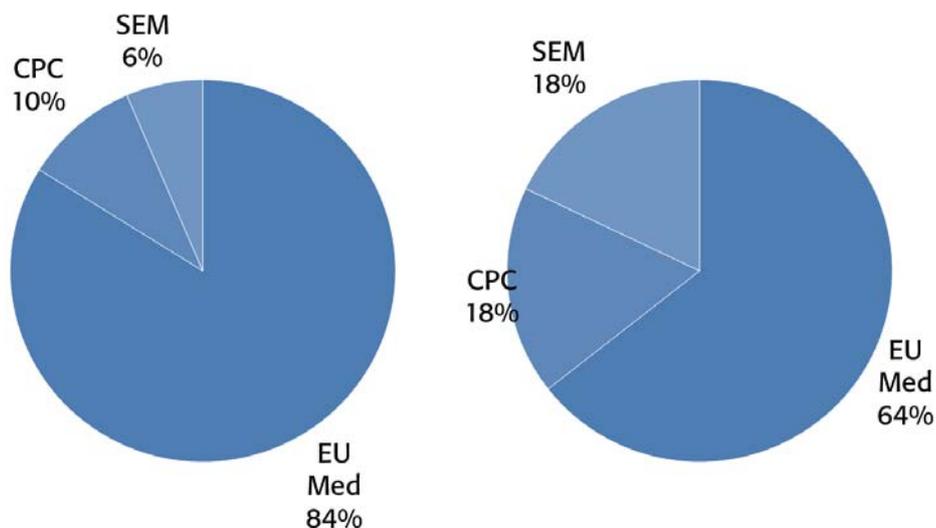


Figure 74: Mediterranean countries: Left: Distribution of the organic agricultural land; right: Distribution of total organic areas in the subregions.

EU Med: European Mediterranean countries; CPC: Candidate & potential candidate countries to the EU; SEM: Southern & Eastern Mediterranean countries (SEM)

Source: MOAN/IAM Bari

When looking at the development of the total organic area from 2006 to 2010, a considerable drop was registered in 2008 in the candidate & potential candidate countries (CPC) that consequently affected the total regional trend. This reduction is due to the exclusion of wild collection areas from the official data in both Croatia and Serbia where in the previous years these figures exceeded 1.5 million hectares.

With the new EU export regulation and restrictions, the challenge in the coming years will be to maintain the current rhythm of growth, specifically for the candidate & potential candidate countries and the Southern & Eastern Mediterranean countries. For most of them, the organic production is still export-oriented even if the domestic market is promising in some cases.

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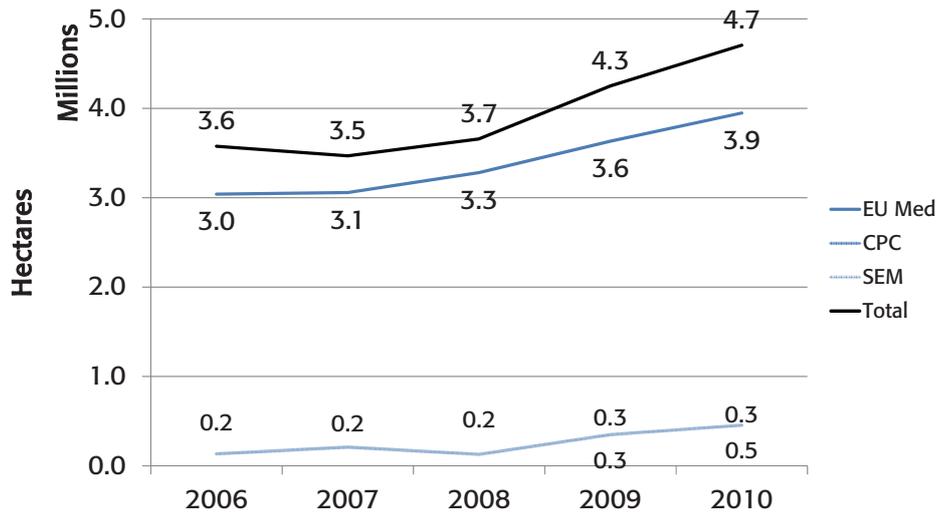


Figure 75: Mediterranean countries: Development of the organic agricultural land in the subregions of the Mediterranean 2005-2010

Source: MOAN/IAM Bari

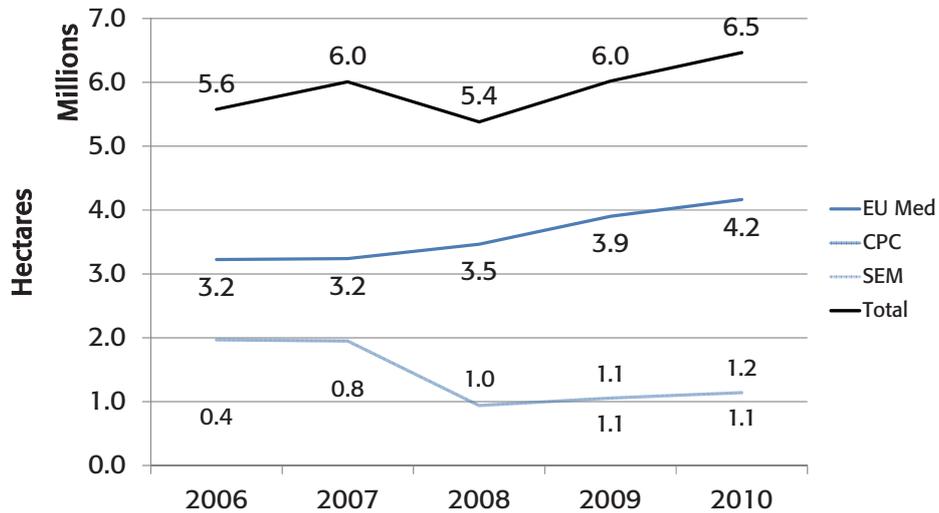


Figure 76: Mediterranean countries: Development of all organic areas in the subregions of the Mediterranean 2005-2010

Source: MOAN/IAM Bari

Spotlight on the latest events and developments of the organic sector in the Mediterranean region

Many important developments have occurred recently in legislation and certification in the Mediterranean.

From a legislative point of view, the year 2011 has been eventful in many Southern & Eastern Mediterranean countries (SEM), specifically in Jordan, Lebanon, and Syria. Here concrete steps were taken towards the adoption of a national regulation for organic agriculture. These measures show a clear political interest towards regularization and organization of the organic sector.

- In Jordan, a by-law for organic agriculture production was issued and published in the official gazette of Jordan in May 2011.
- In Lebanon, a ministerial decree that regulates organic production and processing was issued in November 2011. It should apply six months after its publication.
- In Syria, a draft law for organic production was passed by the parliament in November 2011 and is waiting for the president's approval.
- In Morocco, the cabinet of the general secretariat of the government approved a draft law on organic agricultural and aquatic production in April 2011.

While governments and ministries in the Southern & Eastern Mediterranean countries (SEM) have been working on regulating the organic sector, in Serbia the Ministry of Agriculture has been undertaking a series of modifications and amendments to the national organic law, mainly targeting the obligations of control bodies towards the ministry.

With regards to certification, the year 2011 has been crucial for control bodies and control authorities operating in non-EU countries and interested in exporting to the EU markets. All over the Mediterranean region, EU and non-EU control bodies certifying in third countries have been working hard to comply with the requirements for inclusion on the EU equivalence list.¹ Since 2009, the European Commission has been examining and evaluating the requests of equivalence from control bodies. On December 7, 2011, the final version of the list of equivalent control bodies and control authorities and the relevant specifications for each as referred to in Article 10 of Regulation (EC) No 1235/2008 was published in the Official Journal of the European Union L. 324/12. This list includes a total of thirty control bodies and control authorities, six of which are from the Mediterranean and are allowed to export to the European Union from Mediterranean countries. Four of these are from non-EU Mediterranean countries, and two are from Italy.

- Organska Kontrola, Bosnia and Herzegovina
- Ekolojik Tarim Kontrol Organizasyonu, Turkey
- LibanCert, Lebanon
- Center of Organic Agriculture in Egypt, Egypt
- CCPB Srl, Italy
- Istituto Certificazione Etica e Ambientale, Italy.

¹ This list is published in COMMISSION IMPLEMENTING REGULATION (EU) No 590/2011 of June 20, 2011 amending Regulation (EC) No 1235/2008, laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries. <http://www.ocpro.ca/docs/Equivalency/590%20Import%20Canada%20EN.PDF>

MEDITERRANEAN COUNTRIES

However, the inclusion in the list of equivalence is not permanent and the control body or control authority could be withdrawn if it does not fulfill and respect the requirements defined by the European Commission. Therefore, the challenge that all control bodies and control authorities on the list have is to maintain their position.

One question could be interesting in this context: Could the inclusion of a large number of control bodies and control authorities working in the Mediterranean have a relevant role or impact on increasing exports from this region to the EU? And if so, how can they contribute to this increase?

Latin America and the Caribbean



Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, governments, and RUTA, the Regional Unit for Technical Assistance for Sustainable Rural Development in Central America. For detailed data sources see annex, page 312.

Organic Agriculture in Latin America and the Caribbean

PATRICIA FLORES¹

Organic production

In the Latin American and Caribbean region, organic production is mostly export-oriented. On average, 85 percent of what is produced organically is exported to the main organic markets, such as the European Union, the United States, and Japan. For countries with tropical and mountain ecosystems, the main organic export products are coffee, cacao, banana, and quinoa. For countries with extensive land areas with pastures for animal grazing, the main products are meat and wool. Wild collection of nuts is also of significant importance for international markets. Argentina and Costa Rica are the only two countries in the region with third country status for the European Union.

In the past decade, initiatives coming mostly from civil society (producer organizations and NGOs) and local governments, contributed to the development of domestic markets, which are increasing in size. There are several innovative schemes; among the main ones are farmer's street markets, delivery schemes, supermarkets, organic shops, pick-yourself schemes and on-farm sales. Both the quality of the organic products and the related services are improving in order to satisfy the increasing demand of consumers, who are getting better informed from year to year about the benefits of organic production. Yet, apart from Brazil, the domestic market is still at an initial stage of growth, and much room is left to cover the increasing demand for fresh vegetables and fruits including processed products as well as dairy products, poultry, and eggs.

Organic producers in the region are affected by climate change provoking floods, droughts, extreme climatic phenomena, destroying cultivated areas and seriously affecting their living conditions.

Mexico

In Mexico, organic production is growing steadily, despite the crisis of the agricultural sector. Since 1996, the annual average growth was 32 percent according to CIEESTAM² (2008). In 2008, there were 128'862 producers (99.95 percent are smallholders with less than two hectares) cultivating approximately 340'000 hectares organically. In addition, there are almost 50'000 hectares of wild collection areas. Coffee represents by far the most important organic product for organic farmers. With 185'193 hectares, it constitutes almost 25 percent of the Mexican coffee area, followed by fresh vegetables, avocados (*Persea americana*), and aromatic herbs. Further important organic products are cocoa (*Theobroma cacao*), mango, wild grapes, agave (for tequila and mescal), and coconuts. Mexico is a country with a highly diversified organic production; there are 61 different organic products grown (Gómez Cruz et al. 2010). Organic agriculture has a particular dimension in Mexico as most of the production takes place in areas that are characterized by both poverty and biodiversity. Organic agriculture is concentrated in the States of

¹ Patricia Flores, Representative of IFOAM for Latin America and the Caribbean, Las Grullas 248 El Típal, 4400 Salta Argentina, Fax +54 387 4950140, Internet http://www.ifoam.org/about_ifoam/initiatives/galci.html

² CIEESTAM, Centro de Investigaciones Económicas, Sociales y Tecnológicas de la Agroindustria y la Agricultura Mundial, Mexico.

Chiapas and Oaxaca, which are the poorest states in Mexico and have the lowest Human Development Index. At the same time, Chiapas, together with Oaxaca and Veracruz, represents 70 percent of the country's biodiversity.

Even though 97.3 percent of the organic area is used for the 15 main crops, there is a trend to diversify organic production as farmers wish to broaden their product range. Bamboo (*Bambusa arundinacea*), garlic (*Allium sativum*), neem (*Azadirachta indica*), peanuts (*Arachis hypogaea*), apricots (*Prunus armeniaca*), and chiotilla (*Escontria chiotilla*) are important "new" crops that have been grown organically only for the past three years. Furthermore, there are outstanding non-traditional products cultivated on large areas compared with conventional agriculture. An example is rambutan (*Nephelium Lappaceum*), which is grown on 80 percent of the total rambutan area. High shares are also reached for passion fruit (*Passiflora edulis*; 36.5 percent), blackberry (*Rubus fruticosus*; 7.8 percent) and lychee (*Litchi chinensis*; 6.5 percent) with organic surfaces showing a growing trend in response to external market demand.

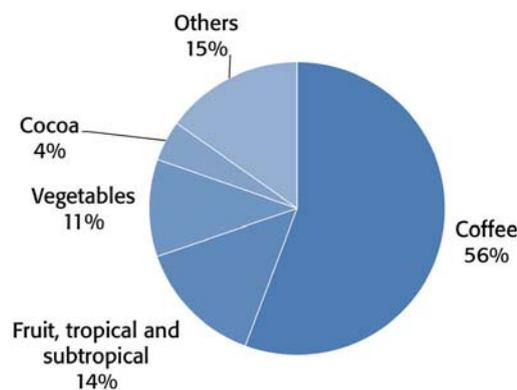


Figure 77: Mexico: Use of organic agricultural land 2008 (total: 330'000 hectares)

Source: University of Chapingo

Central America

Central America is composed of seven countries: Belize, Guatemala, Honduras, El Salvador, Costa Rica, Nicaragua, and Panama. Belize is the only English-speaking country and belongs to the Caribbean Community (CARICOM). It does not participate in the Central American integration efforts on organic agriculture, while the Dominican Republic, although being a Caribbean country, is participating in these efforts. The Dominican Republic has the largest area of organic agricultural land, followed by Nicaragua.

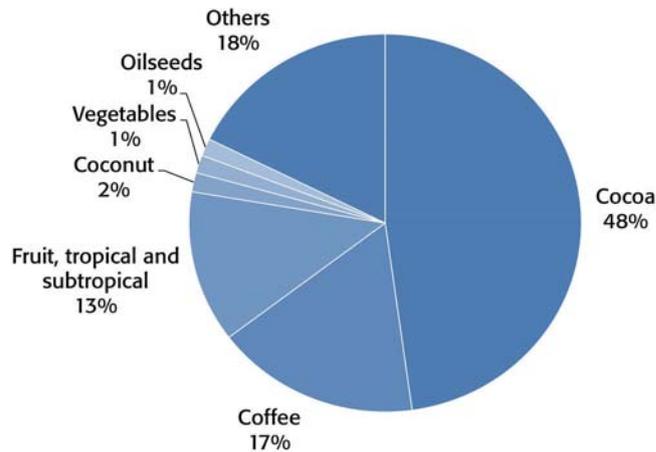


Figure 78: Central America*: Use of organic agricultural land 2010 (total: 250'000 hectares).

Sources: National data sources

* Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama

The main organic products in this region are coffee, cocoa, sesame, cashew, honey, tropical fruits (banana, pineapple, coconut), citrus fruit (orange, mandarin, lemon), medicinal herbs & aromatics, ginger, turmeric, vanilla, and indigo.

The most important crop in Central America is coffee, and there is no exception for the organic sector. There are thousands of small, medium, and big coffee growers, and coffee is a very important source of employment. Coffee production is primarily grown in ecological forest management systems.

Cocoa is also a very important source of income for small farmers throughout Central America. Different projects involving organic and fair trade cocoa have started up in the Honduras and Nicaragua. Nicaragua and Costa Rica have added value to their cocoa by producing organic chocolate for the local market. Organic sesame is developing fast, especially in Nicaragua and El Salvador, and it is accessing important international markets. Organic cashew crops are also increasing in these same countries as well as in Honduras. Costa Rica has developed an important processing infrastructure for tropical fruit, coffee, and cocoa, producing dehydrated products, marmalades, and chocolates. The latter are among the main processed products with added value.

South America

South America plays a unique role in the world because of its mega-diversity, especially in the countries of the Amazon basin: Bolivia, Brazil, Colombia, Ecuador, Guyana, Peru, Surinam, and Venezuela. These countries are regarded as biological reservoirs of the planet. The region has an enormous capacity to feed the world and, therefore, its resources are under high pressure for land use change or industrial agriculture. Diversified organic production is emerging and developing under these conditions, providing organic products

not only for external markets, but also for domestic ones. These markets are steadily increasing through several innovative strategies.

Andean subregion

The Andean subregion is composed of four Andean countries: Colombia, Ecuador, Peru, and Bolivia. These four countries represent 25 percent of the world's biodiversity.¹

› *Peru*

In Peru, organic production for exports is concentrated on five basic products: Brazil nuts (*Bertholletia excelsa*), coffee, cocoa, banana, and quinoa. In total, however, more than 100 organic products are traded in small amounts. The Brazil nut has by far the largest organic area with almost 50 percent of the national organic area (140'000 hectares of wild collection). Sixty-eight percent of organic producers in Peru are cocoa and coffee growers. The boom of Peruvian cuisine has enhanced the value of native organic products produced by small farmers and campesinos. This boom is giving an interesting dynamic to the market at the national level, especially with regard to native Andean crops, many of which are available locally in organic quality. The "ají amarillo" chili pepper is a key ingredient in Peruvian cuisine and deserves special mention here. Peru and Bolivia are centers of origin and domestication of the "ají" (*Capsicum* spp), and they both gather the genetic diversity of this widely used basic condiment. Currently, however, very little of this production is organically grown.

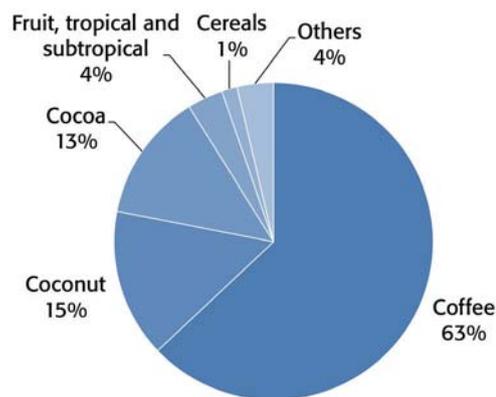


Figure 79: Peru: Use of organic agricultural land 2010 (total: 217'000 hectares).

Source: SENASA Peru

› *Bolivia*

Bolivia's organic production is strong in quinoa, Brazil nuts, coffee, and cocoa. Andean cereals have a particularly high position in the Bolivian organic food supply. They produce

¹ Report GEO Andino, 2003. UNEP-Andean Community-Universidad del Pacífico.

royal quinoa (red, white, black), but also amaranth and kaniwa (*Chenopodium pallidicaule*). Organic producers have managed to add value to their Andean products such as fine chocolates, flours, flakes, puffed cereals, granola, and muesli. In the past years, many other products have been added to the organic product range; among the main ones are medicinal plants, mango, wheat, achiote or annatto (*Bixa orellana*), rice, maca, lemon grass, papaya, avocado, banana, tamarind, guava, cherimoya, pineapple, aloe, wild collection of cocoa, lemon, soybean, and tea. In addition, intra-regional exports have started with Brazil, Chile, and Argentina, but no data are available on this as there is no difference in tariff heading.

› Ecuador

Ecuador's organic exports are based on cocoa, coffee, banana, and shrimp. Besides bananas which are distributed worldwide, it deserves mention that Ecuador has excellent quality organic chocolate, being the first country to have single-origin organic chocolate made entirely in Ecuador and produced according to organic and fair trade standards. The single-region, raw, and specialty chocolate products are crafted to maintain the complex flavor profile of the Arriba Nacional cacao bean. Similar to coffee growers, partnerships with small-scale cacao growers are established to preserve their traditional way of farming, thereby safeguarding the biodiversity of cacao in Ecuador.

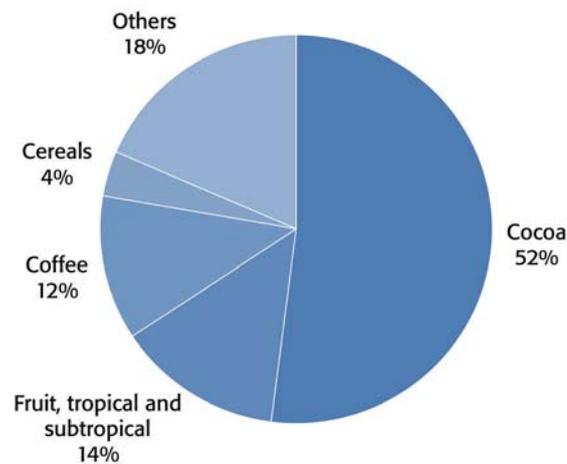


Figure 80: Ecuador: Use of organic agricultural land 2010 (total: 65'000 hectares).

Source: GIZ Ecuador 2011

› Colombia

Colombia is a pioneer country with organic exports, based on organic coffee. Colombia currently has more than 30'000 hectares certified as organic, mostly small farmers producing organic coffee, banana, sugar, oil palm, mangos, and palm heart. There are also many other products sold on domestic markets such as fresh fruits and vegetables, aromatic herbs, processed fruits, fine vinegars, guava pulp, buffalo meat, milk, legumes, pineapple, oranges, and citrus. Colombia has developed an interesting local food supply for

increasing local markets organized at a national level. Fresh fruits and vegetables are the prime products, but there is also plenty of space for added value products such as marmalades, coffee, essential oils, medicinal plants, vinegars, and panela.

South Cone subregion

The South Cone subregion is composed of Brazil, Argentina, Chile, Paraguay, and Uruguay. This subregion is characterized by the big size of some organic projects, basically pastures for animal grazing. Argentina and Chile lead in the number and quality of organic vineyards and wineries. Soybean, sugar, and meat are also important organic products of this subregion.

› Brazil

Brazil is the organic production giant in the region. With a significant domestic market, international organic exports are significant, but they are not only market target for Brazilian organic producers and operators.

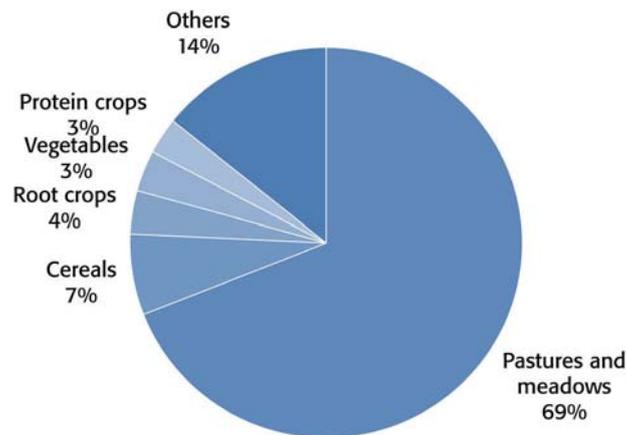


Figure 81: Brazil: Use of the fully converted organic agricultural land 2007 (total: 912'600 hectares)

Source: FiBL estimate, based on 2007 data from Organics Brazil and 2006 data from IDP 2010¹

According to data from 2006, only 60 percent of organic production in Brazil is export-oriented. It is very likely that the domestic market has grown in the last years due to the high purchasing power capacity of Brazilians in this period, resulting in equal balance domestic vs. external markets. Organic exports are fresh and processed products of soybean, sugar, rice, coffee, cocoa, livestock and smaller animals for meat, milk, honey, as well as wild collection (mainly palmito). The development of domestic markets started in the 1970s with pioneer cooperatives organizing farmer's street fairs. Later, specialized stores, delivery schemes, and supermarkets added to the organic supply chain. In Brazil it is

¹ Instituto de Promoção do Desenvolvimento (IPD) (2010): Perfil do mercado orgânico brasileiro como processo de inclusão social. Curitiba Paraná, Brasil.
http://ipd.org.br/upload/tiny_mce/arquivos/Perfil_do_mercado_organico_brasileiro_como_processo_de_inclusao_social.pdf

currently quite easy to get access to diverse organic foods such as fresh vegetables and fruits as well as processed products such as marmalades, sauces, vinegars, oil, rice, sugar, coffee, eggs, cocoa, milk and derivatives, and bakery products. The cosmetic and pharmaceutical industries also have an important share in the domestic market, present in beauty, health, and body care shops as well as in homeopathic and alternative medicine pharmacies.

› *Argentina*

In 2010, Argentina increased its organic cultivated land (arable and permanent crops) by 23 percent compared with 2009. However, the organic grazing areas—and thus the total organically managed area—decreased. The grazing area for organic livestock (bovine and ovine animals) decreased by five percent. The increase of organic cropland is due to a growth in cereals and oilseeds, which increased by 41 percent compared with the previous year. The main products of plant origin exported that are exported include pears, sugar, apples, soybean, and garlic, but also cardamom, cereals, rice, and corn, as well as sunflower expeller. The most important animal products for export are wool and honey. The main crops for processing are sugarcane (40 percent), grapes (29 percent), and olives (24 percent). The domestic market is characterized by a broad and diversified supply of fresh vegetables and fruits, but the domestic market is not yet relevant. In Buenos Aires, organic consumers can find several specialized organic stores and restaurants; in other provinces it is, however, difficult to find organic products. Supermarkets sell organic “yerba mate,” a traditional local infusion, as well as sugar, tea, wine, and Patagonian berry marmalade.

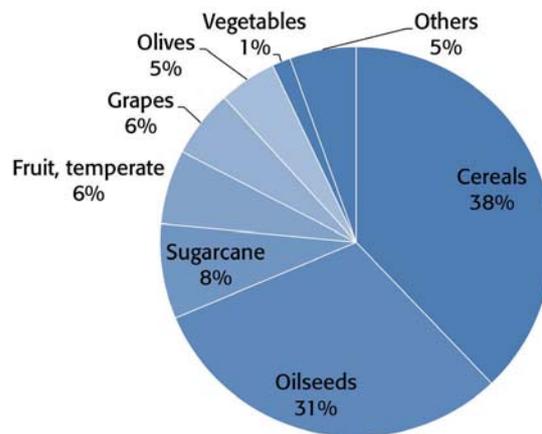


Figure 82: Argentina: Use of the organic cropland 2010 (total cropland: 72'000 hectares, total agricultural land: 4.2 million hectares).

Source: SENASA, Buenos Aires, 2011

› *Chile*

Chile has a prominent professional agricultural sector requiring all operators—conventional or organic—to comply with strict sanitary standards and labor conditions. Most of the organic production is exported to the United States (50 percent) and the

European Union (40 percent). Ten percent of the exports are going to Asia, Switzerland, Brazil, and Australia. According to ODEPA¹ data from 2010, Chile has 31'696 hectares of organic agricultural land (including extensive grazing areas) and an additional 119'078 of wild collection areas. The main wild collection products are rosehips in Southern Chile, which is collected mostly on its own, but also in association with medicinal herbs, black mulberries, blackberries, *Crataegus* or *Hypericum*.

The organic cropland (= arable + permanent cropland) of around 15'000 hectares consists of berries (36 percent), grapes (26 percent), tropical and temperate fruit (19 percent), olives and medicinal plants (8 percent each; see also Figure 83). With 1'268 hectares, apples constitute eight percent of the cropland. Even though their shares are still small, it is important to mention the cultivation of new crops such as Peruvian cherry or cape gooseberry (*Physalis peruviana*), horned melon (*Cucurbitas asaurus*), and pistachio.

Chile has exceptional conditions to grow good quality berries, and Chilean organic berry producers are specialized in bilberry (*Vaccinium*) (62 percent), raspberry (18 percent), black mulberry (8.8 percent), berries (7.7 percent), strawberry, boysenberries, and Marion berry (percentages refer to the 2008 data of ODEPA).

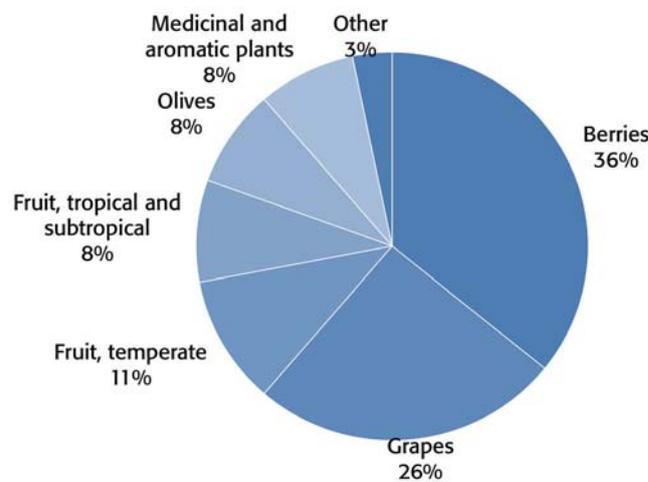


Figure 83: Chile: Use of organic cropland 2010 (total cropland: 15'000 hectares, total organic agricultural land including grassland/grazing areas 32'000 hectares)

Source: ODEPA 2011

The domestic market is growing, but it is still not significant compared with the importance exports have. In addition to the traditional strategies of street fairs, restaurants and specialized stores, there are internet sites offering all kinds of organic products.

¹ ODEPA—Oficina de Estudios y Políticas Agrarias, Ministerio de Agricultura de Chile, Information Service of the Chilean agricultural sector.

› *Paraguay*

In terms of organic exports, Paraguay is the largest supplier of organic sugar in the world. There are seven major companies producing organic sugar, involving 3'500 producers. According to 2008 data, Paraguay has 51'000 hectares of organic land, involving 11'000 producers cultivating sugarcane, sesame, stevia, yerba mate, palm heart, orange, lemon verbena, cotton, peanuts, and soybean. The organic production areas are located in the departments of San Pedro, Caaguazú, Presidente Hayes, Caazapá, Misiones, Guairá, Itapúa y Canindeyú. Regarding organic cotton, Paraguay exports manufactured products for the clothing industry. Fresh fruits and vegetables are marketed at local fairs and a number of sales points in main cities.

› *Uruguay*

Uruguay has 0.93 million hectares of organic land according to 2006 data. This corresponds to six percent of the agricultural land. Ninety-four percent of the organic agricultural land is grazing areas for livestock for meat exports. The remainder (six percent) is dedicated to organic dairy farming, extensive agriculture, citrus, fruits, and aromatic and medicinal herbs. Apiculture is also an important economic activity for organic production with 11'400 hives for honey exports. The organic domestic market relies on approximately 150 operators producing meat, vegetables, fruits, honey, herbs, sweets, canned products, dairy products, and wine. The main marketing channels for organic products are supermarkets (59 percent), direct sales (25 percent), street fairs (9 percent), and specialized fairs (7 percent). The domestic organic market is valued at 1.3 million US dollars.

Organic Guarantee System

All countries in the region have some kind of organic regulation with detailed requirements for organic production and guarantee systems. Third party certification is applied widely, and the region has many certification bodies with highly qualified local staff.

Since 2008, the Ministries of Agriculture created the Inter American Commission on Organic Agriculture (CIAO). Control authorities on organic agriculture meet annually to improve their function of supervising organic production and improving organic quality assurance. Presently, CIAO includes 18 country members: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Honduras, Guatemala, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Uruguay, and Venezuela. The Board of Directors consists of Costa Rica, Mexico, Paraguay, and Argentina, Argentina, represented by the competent authority SENASA, being the president of the Board. In 2011, under CIAO's institutional support, Costa Rica, Honduras, Guatemala, El Salvador, Nicaragua, Panama, and Dominican Republic finished the process of developing the first organic agriculture regional standard on the American continent. After public national and regional consultations and workshops, the regional standard is currently in consultation with the WTO. In 2011, CIAO introduced a project to develop a regional standard for organic agriculture for the Andean countries. This initiative is presently at an early stage. Another recent initiative—since June 2011—of CIAO is the development of a tool to assess performance and to detect areas to be improved, with the aim to standardize the work that control authorities carry out at the regional level.

In Brazil, the organic agriculture regulation came into force in January 2011. For organic imports, this means the following:

- (a) Imported organic products can be traded in the country only if they comply with the Brazilian regulation on organic production;
- (b) The admission of imported organic products to the country will only be permitted if the guarantee of the product is carried out by a conformity assessment body accredited by MAPA (Ministry of Agriculture, Livestock, Fisheries and Supply), or if the country of origin already has an equivalence agreement of its conformity assessment system with the Brazilian System of Organic Conformity Assessment;
- (c) Imported organic products will lose their organic status, if they are subject to quarantine treatments that are not compatible with the Brazilian organic regulation.

Regarding labeling of imported organic products, controlled either by accredited bodies in Brazil or by equivalence agreements, the label of the products must contain the seal of the Brazilian System of Organic Conformity Assessment (SisOrg). To read more about SisOrg, read IN 19 (IN=Instrucao Normativa) from May 2009 (www.prefiraorganicos.com.br).

Besides the third party certification system, Participatory Guarantee Systems (PGS) are increasing in number and are in some countries officially recognized by the national authorities. Participatory Guarantee Systems are applied to guarantee organic products from family agriculture and for direct sales on the local market. It is still a major point of discussion in many of the regulations that accept PGS, what is a "local market". This discussion is especially relevant in Mexico, where the implementation of the Organic Law and regulation allows organic family farmers to sell their products only in their local fairs. There are thousands of organic family farmers who are not visible in the official statistics. PGS is a tool not only for the development of local organic markets, but also a practice aiming to include all farmers -big and small- in the region. In Colombia, for example, it is estimated that there are 11'133 hectares of organic land managed by 81'255 families and 956 grassroot organizations consisting of people of various origins and ethnic backgrounds including afro-descendants, indigenous peoples, and campesinos. PGS-related organizations and people are organized in the PGS Latin American Forum, and they gather every year. The last meeting in 2011 in Bolivia delivered a public communication indicating the main concerns and perspective for future collaboration and work.

Governmental support

The participation of governments in the organic sector has been focused on control and regulatory issues. This is seen in the many organic regulations the region has. The organic movement expects a more effective and clear participation of governments through public policies to foster and develop organic agriculture not only for export-oriented operators, but also for the domestic organic market and family farmers. However, there are interesting experiences including governmental support with a multi-stakeholder approach.

In Ecuador, recent initiatives involve grassroot organizations and public organizations such as UNOCANC (Union de Organizaciones Campesinas del Norte de Cotopaxi), FAO, and the Ministry of Agriculture to produce certified organic Andean products, vegetables, and livestock.

The Belize Organic Alliance (BOA) is a group of organic growers and consumers, starting a PGS process in the district of Cayo. With the technical support of the Ministry of Agriculture of Belize and the Inter American Institute for Cooperation on Agriculture

(IICA), BOA is being trained on organizational aspects as well as on organic certification, inspection, and practices.

Very few countries have a national strategy to foster organic agriculture. Paraguay developed its national strategy and made it public in 2008, but has not had any funds to implement it. In Nicaragua the situation is similar. In January 2011, Chile made its national strategy for organic agriculture public. Since 2002, Costa Rica has had a National Organic Agriculture Program (PNAO) to develop organic agriculture, and Brazil has the Coordination on Agroecology in the Ministry of Agriculture in charge of organic agriculture development and regulation.

In Colombia, the organic production chain (Cadena de Produccion Organica) was officially established in December 2011, putting organic production on the agenda of the Ministry of Agriculture and Rural Development. The board of directors is comprised of a representative multi-stakeholder group from the organic sector: producers, traders, certification bodies, NGOs, researchers, service providers and, among the public entities, there is the ICA (agricultural health and food service of the Ministry of Agriculture and Rural Development) and Parques Naturales (National Parks of the Ministry of Environment, Housing and Territorial Development). Work will focus on several topics: promotion, funding and support, marketing and public procurement, certification and standards, and training.

The Family Agriculture Network (REAF), quite active in the South Cone, is addressing organic and sustainable agriculture for family farming. In May 2011, the Andean Community (CAN) finalized the project "Organic Family Agriculture in the Andean Community." As a result, the government representatives and Ministries of Agriculture of the ad hoc working group of the project approved the Regional Program for the Promotion of Organic Agriculture. In order to make this program official and binding, a decision of the Andean Community should be approved in the short-term. The program addresses the need for a more inclusive promotion of organic agriculture in the Andean countries, providing capacity building for public and civil society stakeholders, integration mechanisms, information management, funding and available resources, research, and extension.

In terms of institutional markets, Brazil has been successful in providing organic food from family farmers for the national program of school meals, which is part of the Fome Zero Action (Zero Hunger). The Law Nr. 11.947 establishes that at least 30 percent of school meals should be purchased from family farms, giving priority to those farms producing organically. In 2011, this governmental initiative has been awarded the "Gestor Eficiente da Merenda Escolar" award in 22 municipalities that successfully implemented the strategy of Fome Zero.

The FIFA World Cup 2014 will be held in Brazil. The Brazilian organic sector is not staying away from this major event. In December 2011, the approval of the Organic and Sustainable Cup Campaign was officially announced. This campaign will be launched in the first half of 2012. The aim is to motivate organic operators to provide organic products and services for the World Cup. The initiative is led by the Ministry of Agricultural Development (MDA), Planeta Organico and IPD (Development Promotion Institute / Organics Brasil).

Education, extension, and research

Although the public sector has little presence in extension and research services due to lack of resources and low priority, there are some interesting initiatives being carried out. PROCISUR, a regional project since 2004 implemented by the national research agencies, develops organic production and family agriculture. It is particularly active in the South Cone subregion.

In Colombia, the National Training Service (SENA—Servicio Nacional de Aprendizaje), part of the Ministry of Labour, has annually trained 5'000 students in organic agriculture since 2004. In some locations, it has been shifting its focus completely to organic agriculture (for instance SENA Pitalito).

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Peru: The Market for Organic Products

F. JAVIER MARTINEZ¹

The market for organic products in Peru is increasing in importance. This is not only because of increasing local and international sales, but also because imports are becoming more important.

Today, the country capital city of Lima has more than 40 points of sale. The organic markets—called “Bioferias”—are pioneers in the marketing of organic products in Peru, registering sales of over 600'000 US dollars per year. It is estimated that the local market size is around 13.1 to 23.2 million US dollars.

General market outlook

On the supply side, the outlook for the organic market in Peru is positive for several reasons:

- Availability of private credit for activities related to the implementation of clean technologies and reduction of CO₂ emissions;
- Increasing popularity and availability of organic products at a local level;
- Companies' interest to use healthier and environmentally friendlier inputs in the production process;
- Better availability of organic products in the general retail trade;
- Development of projects promoting the consumption of organic products.

On the demand side, the following aspects are noteworthy:

- The increasing interest of families from Lima to change to ecological consumption habits (3 percent in 2000, 10 percent in 2002, 23 percent in 2006);
- The increasing consumer fear that conventional products could have negative effects on their health (allergies, etc.);
- An increasing number of tourists coming to Peru (2.06 million in 2008, 2.14 million in 2009, 2.25 million in 2010), who have healthy and environmentally friendly consumption habits;
- Increasingly sophisticated consumption patterns.

In addition, Peruvian exports have been strengthened by better prices for coffee and cocoa and the introduction of other products such as ginger.

Current challenges

However, local organic production is still facing significant problems to grow and develop. These include:

- **The limited availability of processing facilities:** Such facilities are mainly used in the food industry.

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- **The conditions imposed by supermarkets:** Supermarkets demand that the suppliers provide large production volumes in order to assure continuous supply.
- **The uncertain position of the Government towards the entry of transgenic plants:** Government authorities have not yet decided on the conditions of the use or the consumption of transgenic food.

Peruvian exports of organic products have continually grown. They increased by 36.4 percent in the years from 2005 to 2010 and by 41.8 percent between January 2011 and April 2011.

These exports are mainly organic primary and processed food products. During the year 2010, this sector accounted for 95.8 percent of total exports while the textile sector reached 4.2 percent.

The main organic exported food products are coffee, banana, and cocoa. It should be noted that since 2009, quinoa has pushed the mango from the list of top five products due to the pressure on farm prices, which is affecting the profitability of mango production.

The main markets of Peruvian organic food exports are the United States and the Netherlands accounting for 46.7 percent of all imports.

The main organic textile product for export is cotton. It has been recovering since 2008, and reached 9.2 million US dollars in 2010. The main market is the United States. During 2010, Germany exceeded the purchases of Japan and Bolivia and also entered the top five.

Imports

Peruvian imports of organic products are increasing as well. Imports have increased by 95.7 percent during 2005 and 2010 by 46.4 percent during the period January to April 2011 compared to the same period from 2010.

These imports are mainly food products. In the year 2010, this sector accounted for 61.8 percent of total imports, while textiles and other manufactured non-food products reached 35.2 and 2.93 percent respectively.

During the year 2010, wheat and soy were the main organic products imported because of a boom of the organic bakery sector.

Peruvian imports of organic products come mainly from the United States and Bolivia (42.1 percent of all imports).

In the manufacturing sector, Sri Lanka (39.3 million US dollars) and Colombia (7 million US dollars) were the unique providers for the Peruvian markets. They provided organic building materials.

The main organic textile product imported is cotton. In the year 2010, it reached 0.56 million US dollars. Peruvian imports of organic textile products come mainly from China and Mexico. They accounted for 86.6 percent of all organic textile imports.

Finally, the Peruvian imports of organic products are marketed via wholesalers (distributors and manufacturers), retailers (cafes and restaurants, e-commerce, exporters, retail shops), and direct imports (importers that buy products for personal consumption).

In the year 2010, wholesalers accounted for 73.8 percent of the Peruvian imports of organic products while retailers accounted for 26.1 percent.

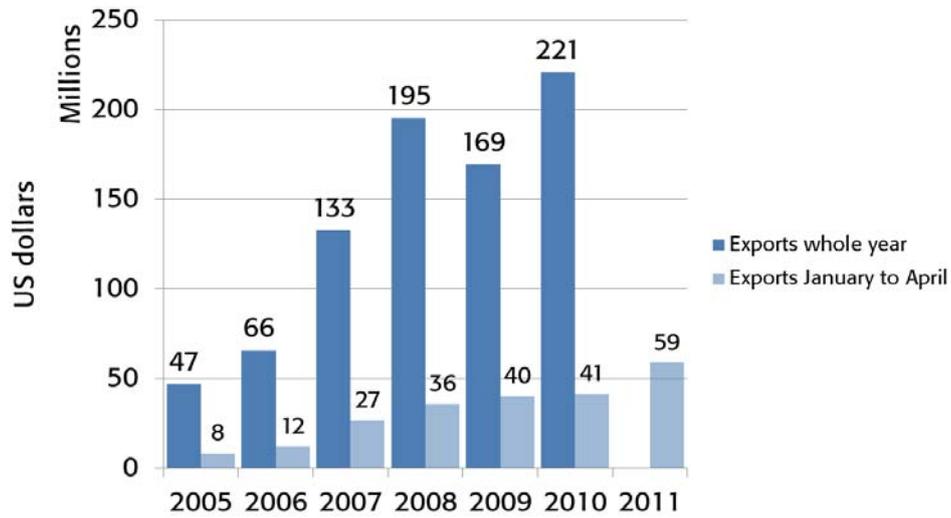


Figure 84: Peru: Exports of organic products 2005–2011 (Estimates)

Source: SUNAT

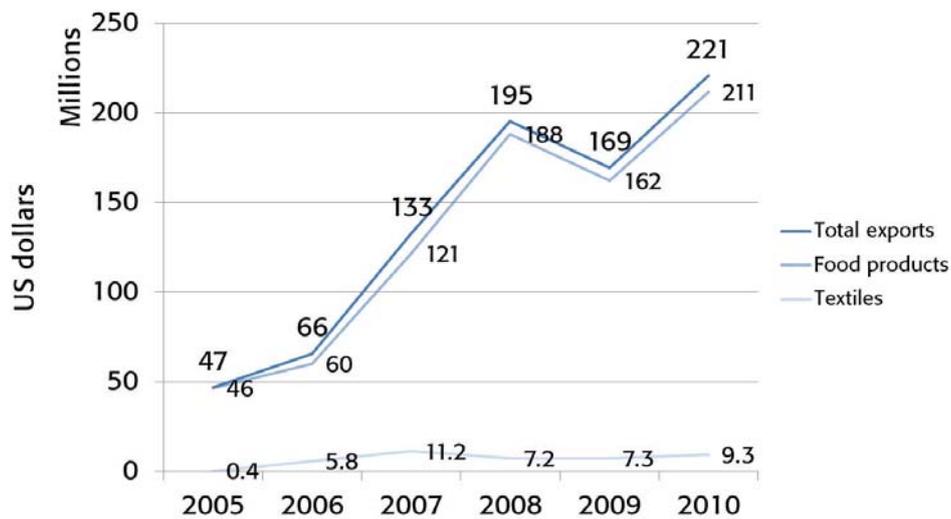


Figure 85: Peru: Exports of organic products by sector 2005–2011 (Estimates)

Source: SUNAT

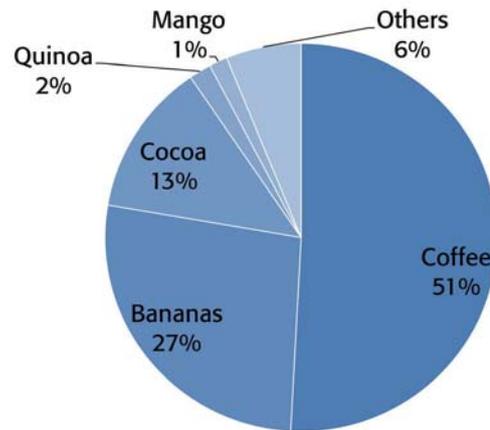


Figure 86: Peru: Exports of organic food products by product 2010, based on export values (Estimates)

Source: SUNAT

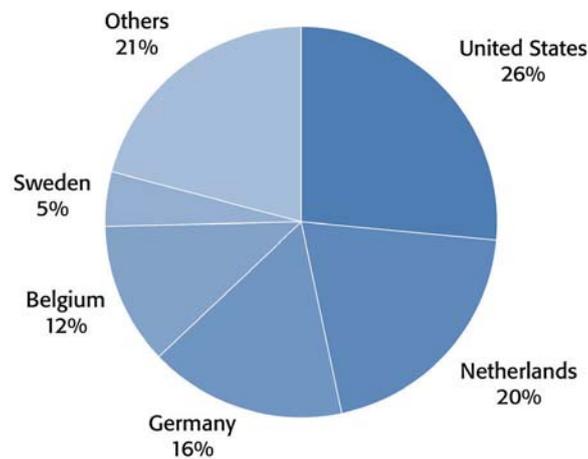


Figure 87: Peru: Exports of organic products by destinations 2010 (Estimates)

Source: SUNAT

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Organic Agriculture in Latin America and Caribbean: Graphs

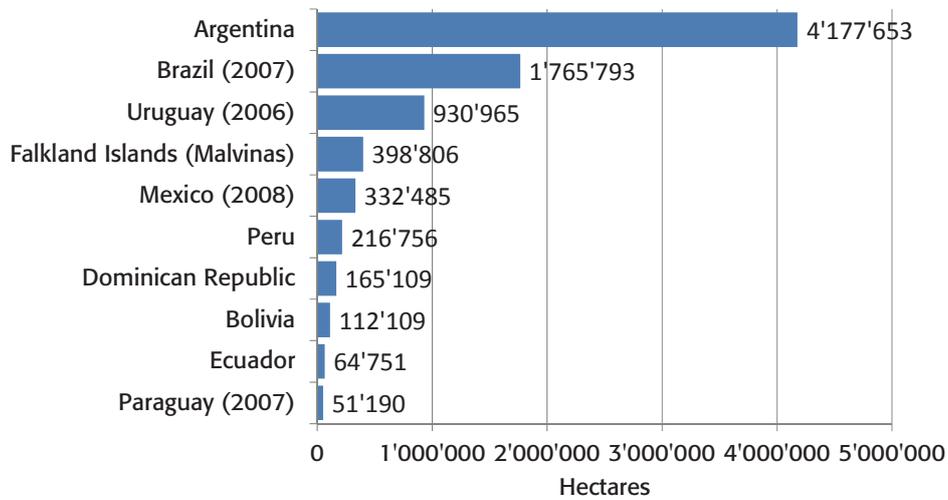


Figure 88: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

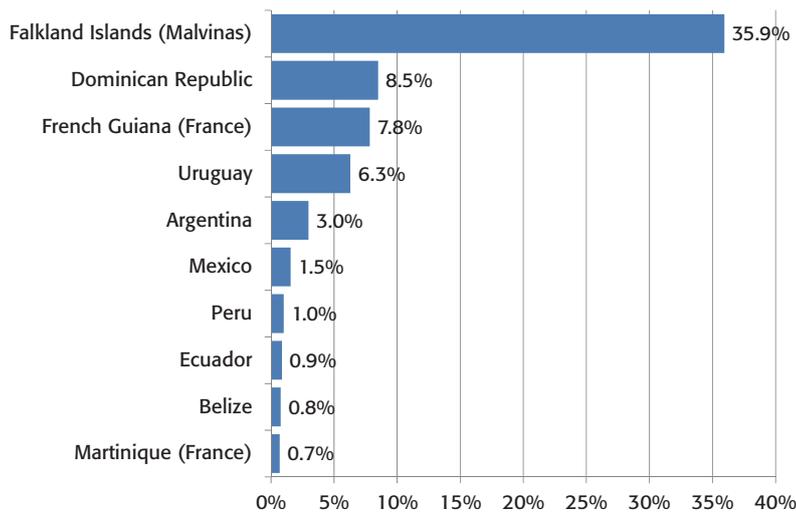


Figure 89: Latin America and Caribbean: The ten countries with the highest shares of organic agricultural land 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

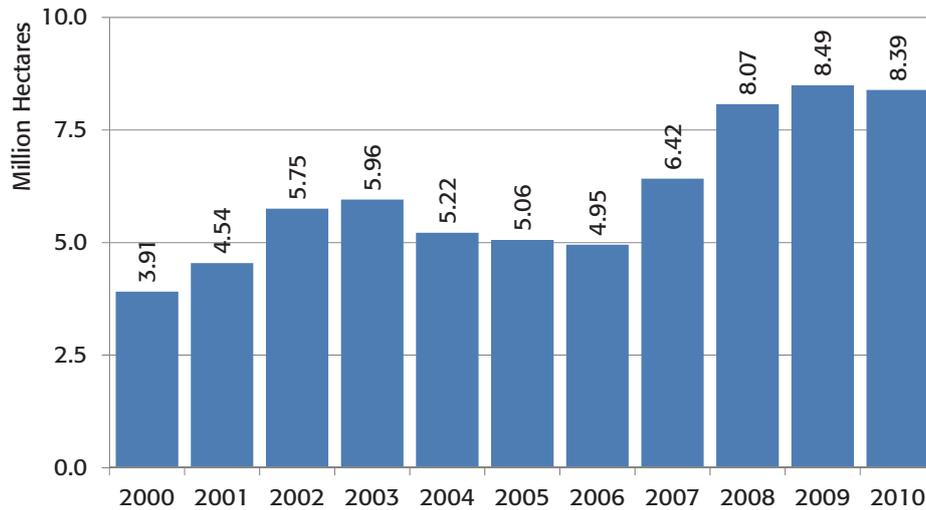


Figure 90: Latin America and Caribbean: Development of organic agricultural land 2000-2010

Source: FiBL-IFOAM-SOEL Surveys 1999-2010

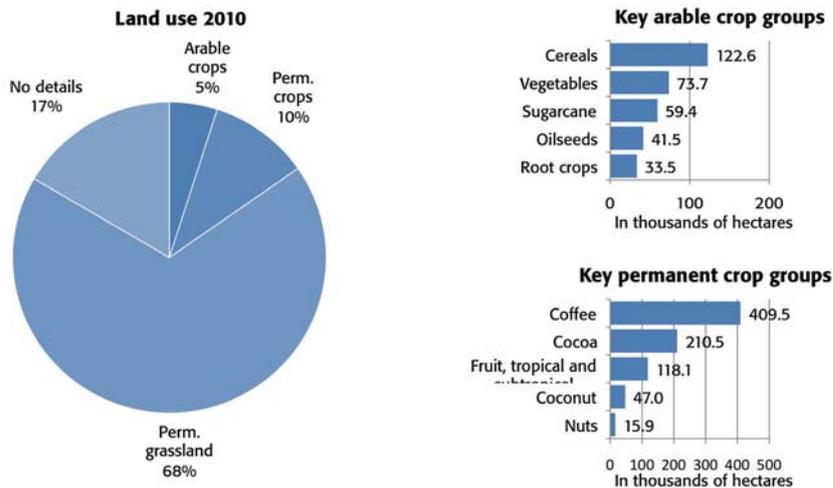


Figure 91: Latin America and Caribbean: Land use in organic agriculture 2010

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Organic Agriculture in Latin America and Caribbean: Tables

Table 70: Latin America: Organic agricultural land, share of total agricultural land and number of producers 2010

Country	Area [ha]	Share of total agr. land	Producers
Argentina	4'177'653	2.97%	1'856
Belize	1'177	0.77%	2'017
Bolivia (Plurinational State of)	112'109	0.30%	11'646
Brazil	1'765'793	0.68%	7'250
Chile	31'696	0.20%	529
Colombia	33'334	0.08%	4'775
Costa Rica	11'114	0.62%	3'000
Cuba	14'314	0.22%	2'467
Dominican Republic	165'109	8.49%	23'376
Ecuador	64'751	0.86%	13'114
El Salvador	6'736	0.44%	2'000
Falkland Islands (Malvinas)	398'806	35.94%	8
French Guiana (France)	1'776	7.82%	27
Grenada	85	0.68%	3
Guadeloupe (France)	27	0.07%	26
Guatemala	13'375	0.30%	3'008
Guyana	4'249	0.25%	74
Haiti	188	0.01%	42
Honduras	17'825	0.56%	1'113
Jamaica	542	0.12%	80
Martinique (France)	193	0.69%	27
Mexico	332'485	1.55%	128'862
Nicaragua	33'621	0.65%	10'060
Panama	3'242	0.15%	9
Paraguay	51'190	0.24%	11'401
Peru	216'756	1.01%	44'827
Suriname	11	0.01%	1
Trinidad and Tobago	No data	0.00%	No data
Uruguay	930'965	6.29%	630
Venezuela (Bolivarian Republic of)	337	0.02%	4
Total	8'389'459	1.36%	272'232

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 71: Latin America: All organic areas 2010

Country	Agriculture [ha]	Aquaculture [ha]	Wild collection [ha]	Total [ha]
Argentina	4'177'653		725'152	4'902'805
Belize	1'177			1'177
Bolivia	112'109		828'606	940'715
Brazil	1'765'793	2'700	6'200'380	7'968'873
Chile	31'696		119'087	150'783
Colombia	33'334		6'855	40'189
Costa Rica	11'114			11'114
Cuba	14'314			14'314
Dominican Republic	165'109			165'109
Ecuador	64'751	1'760	9'680	76'191
El Salvador	6'736			6'736
Falkland Islands (Malvinas)	398'806			398'806
French Guiana (France)	1'776			1'776
Grenada	85			85
Guadeloupe (France)	27			27
Guatemala	13'375			13'375
Guyana	4'249		59'930	64'179
Haiti	188			188
Honduras	17'825	5		17'830
Jamaica	542		0	542
Martinique (France)	193			193
Mexico	332'485		58'530	391'015
Nicaragua	33'621		11'463	45'084
Panama	3'242			3'242
Paraguay	51'190			51'190
Peru	216'756	4	172'666	389'426
oSuriname	11			11
Uruguay	930'965		2'300	933'265
Venezuela (Bolivarian Republic of)	337			337
Total	8'389'459	4'469	8'194'649	16'588'578

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 72: Latin America: Land use in organic agriculture 2010

Main use	Crop category	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	1'382'758
Arable crops	Arable crops, no details	36
	Arable crops, other	20'609
	Cereals	122'596
	Flowers and ornamental plants	8
	Green fodder from arable land	15
	Industrial crops	12'557
	Medicinal and aromatic plants	16'269
	Oilseeds	41'509
	Protein crops	30'131
	Root crops	33'510
	Seeds and seedlings	10
	Strawberries	215
	Sugarcane	59'429
	Textile crops	1'703
	Tobacco	42
	Vegetables	73'709
Arable crops total		412'349
Cropland, no details	Cropland, no details	7'234
Other agricultural land	Fallow land, crop rotation	1
	Unutilized land	30'000
Other agricultural land, total		30'001
Permanent crops	Berries	6'048
	Citrus fruit	15'629
	Cocoa	210'483
	Coconut	47'050
	Coffee	409'515
	Flowers and ornamental plants, permanent	10
	Fruit, temperate	6'909
	Fruit, tropical and subtropical	118'094
	Fruit/nuts/berries	1'000
	Grapes	7'948
	Medicinal and aromatic plants, permanent	333
	Nurseries	15
	Nuts	15'855
	Olives	5'188
	Other permanent crops	15'156
	Tea/mate, etc.	6'854
Permanent crops total		866'086
Permanent grassland total		5'691'032
Total		8'389'459

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 73: Latin America: Use of wild collection areas 2010

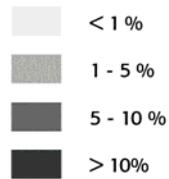
Category of crops harvested	Area [ha]
Beekeeping	732'925
Forest honey	168
Fruit, wild	12'126
Medicinal and aromatic plants, wild	239
Mushrooms, wild	980
Nuts, wild	800'687
Palmito, wild	66'780
Wild collection, no details	6'579'176
Wild collection, other	1'568
Total	8'194'649

Source: FiBL-IFOAM Survey 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

North America



Share of organic agricultural land



Map 6: Organic agricultural land in Canada and the US 2010

Source: Canadian Organic Growers (COG) und United States Department of Agriculture (USDA)

For Canada: Conversion area included.
 For detailed data sources see annex, page 312.

North American Overview

BARBARA FITCH HAUMANN¹

In North America, 2011 witnessed rising concern over genetic engineering (GE), particularly for the organic sector, and stepped-up efforts for mandatory GE labeling to safeguard consumers' right to know what is in what they eat.

These concerns were exacerbated by action in early 2011 by the U.S. Department of Agriculture (USDA) allowing commercial planting of alfalfa genetically engineered to tolerate glyphosate (Roundup) herbicide and a subsequent USDA decision allowing planting of GE sugar beets despite a court order to complete a final Environmental Impact Statement (EIS) before any decision on its deregulation.

The outcry from organic and other non-GE producers led U.S. Secretary of Agriculture Tom Vilsack to charge USDA's newly reconstituted Advisory Committee on Biotechnology and 21st Century Agriculture (AC21) to explore whether and how to compensate producers who sustain economic losses as a result of the unintended presence of biotechnology-enhanced trait in organic and other non-GE crops.

That committee, whose work is ongoing and includes representation from the organic industry, has been asked to answer the following:

- What types of compensation mechanisms, if any, would be appropriate to address economic losses by farmers in which the value of their crops is reduced by unintended presence of GE materials?
- What would be necessary to implement such mechanisms? What would be the eligibility standard for a loss and what tools and triggers would be needed to verify and measure such losses and determine if claims are compensable?
- What other actions would be appropriate to bolster or facilitate coexistence among different agricultural production systems in the United States?

Meanwhile, USDA's National Institute of Food and Agriculture (NIFA) awarded eight research grants to study the agricultural effects of GE. The Biotechnology Risk Assessment Grants (BRAG) program supports research in identifying and developing practices to minimize risks associated with GE organisms; developing methods to monitor the dispersal of GE organisms; increasing knowledge about the characteristics, rates and methods of gene transfer that may occur between GE organisms and related wild and domesticated organisms; and providing analysis which compares impacts of organisms modified through GE to other types of production systems.

The Organic Trade Association's (OTA's) Board of Directors in July reviewed, revised and adopted an updated policy position on genetically modified organisms (GMOs). While continuing to call for a moratorium on GMOs in agriculture, OTA's policy supports mandatory labeling of all agricultural GMOs and their products, advocates for a more robust regulatory framework for federal oversight of GMO crops, calls for bolstering

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organic as the gold standard by advocating for continuous improvement of the organic practice standard, advocates for policies that assign the cost of contamination prevention and market loss to the developers of GMO technology, advocates for a seed purity standard to secure a seed supply to the organic sector that is free of GMOs, and calls for educating the public and policymakers regarding the environmental and health concerns emerging with GMOs.

In Canada, meanwhile, GE alfalfa has yet to officially enter the country. Although it has been approved, no registered variety exists at this time. A broad cross-section of organic and consumer groups has been voicing concern over the impact this could have on organic farms as a result of general environmental release.

Canada's Organic Value Chain Roundtable, an industry advisory body to the government, commissioned a study on the "Challenges and approaches in mitigating risks associated with the adventitious presence of GM products in organic crop production in Canada." The study evaluates the relative risks and costs from GE contamination of organic crops for corn, soy, canola, alfalfa and wheat. Alfalfa and wheat have yet to be approved and commercialized in Canada, but are shown to present a relatively high risk and economic cost.

Following the Canada Organic Trade Association's (COTA's) successful Parliamentary conference and organic reception in Ottawa during Organic Week in October, three high-profile members of the Canadian organic sector were called to appear before the House Standing Committee on Agriculture and Agri-Food. The Canadian Organic Growers, Organic Federation of Canada and COTA appeared before elected members to speak on their current concerns and priorities over the next five years, including GE alfalfa, and the new movement towards a "low-level presence" threshold for unapproved GE products showing up in imports.

Other consultations have shown the Canadian government listening to organic and consumer group advocacy on the proliferation of un-defined "natural" food claims in the marketplace. Following industry consultations, the Canadian Food Inspection Agency published draft guidelines that would make "natural" claims on meat products all but impossible, unless relating to the hunting of wild game. The government further plans to broaden this consultation to include all foods in 2012.

In advocacy efforts, organic interests joined forces to organize and take part in a 313-mile GMO Right2Know March that began in New York City on Oct. 1, and ended Oct. 16 in Washington, D.C. The goal of the campaign was to raise consumer awareness and pressure the U.S. government on the lack of labeling of foods made with GMOs.

In an additional effort, more than 450 businesses and organizations started a 'Just Label It: We Have a Right to Know' campaign, including a petition to the U.S. Food and Drug Administration (FDA) calling for labels on products that use GE ingredients. By early December, over 410,000 comments in support of GE labeling had been submitted to FDA.

Meanwhile, on Nov. 10, the California Right to Know Campaign filed the California Right to Know Genetically Engineered Food Act with the State Attorney General. The initiative, if approved by California voters in a statewide ballot in 2012, would require that food sold in retail outlets be labeled if genetically engineered, or if it contains GE ingredients.

Equivalency agreements

At the end of June 2011, the Government of Canada entered into an equivalency arrangement on the trade of organic products with the European Union (EU). It is the world's second such agreement. The first organic equivalency arrangement was signed by the Canadian Food Inspection Agency and the U.S. Department of Agriculture (USDA) in June 2009.

Unlike the U.S.–Canada arrangement, the EU–Canada equivalency does not include any “variances” or additional requirements at the standards level. This means that products certified to the Canadian or European standards are recognized as fully organic in both jurisdictions without the need for additional practices or restrictions in place. The respective organic logos of both jurisdictions may also be used on equivalent products. However, the European language in its regulatory amendment includes parameters that limit recognition to products and ingredients originating exclusively from Canada.

COTA has formally expressed concern that such restrictions may negatively affect Canadian organic manufacturers who must source many of their organic ingredients from outside the country. COTA has received assurances that these scenarios and concerns are being reviewed and addressed in ongoing talks between Canada and the EU on full implementation of the agreement. However, even in weeks immediately following announcement of the agreement, it was evident that many Canadian businesses saw a significant increase in requests from Europe, particularly in the raw commodity sector.

In another development, Canada and the United States in late January 2012 took another step toward full equivalency with Canada's recognition of U.S. organic requirements for ruminants, including year-round access to the outdoors and 30 percent of their feed during the grazing season from pasture, as equivalent to its standards for ruminant stocking rates. This recognition will streamline trade for U.S. organic dairy, beef, sheep, goat and bison producers exporting products to Canada.

In another major development, the European Commission's Standing Committee on Organic Farming (SCOF) in Brussels in December 2011 approved a framework for an organic equivalence arrangement between the world's two largest markets for organic food.

Under the proposed arrangement, the European Union (EU) and United States will work together to promote strong organic programs, protect organic standards, enhance cooperation and facilitate trade in organic products. OTA fully supports this initiative, and believes the new EU-U.S. organic equivalence cooperation arrangement will provide expanded market access, reduce duplicative requirements, and reduce certification costs while protecting organic integrity. OTA's EU-U.S. Trade Task Force has identified an organic equivalence arrangement as the top priority to enhance trade in organic products and provide long-term opportunities for U.S. organic producers and handlers.

At the time of this writing, the U.S. government was conducting legal and technical reviews of the proposed arrangement and preparing the documentation and notification necessary to finalize the arrangement. Both sides hoped to finalize the arrangement early in 2012.

Trade codes

While Canada has had harmonized serial codes in place to track over 60 imported organic products since 2007, 2011 was the first year that the United States had trade codes in place for tracking a select number of U.S. imports and exports of organic products. As a result, the United States now has a way of estimating at least a share of U.S. organic import and exports.

United States Country Report

BY BARBARA FITCH HAUMANN¹

Organic agriculture continues to gain ground in the United States, with a growing market and increasing consumer interest. Harmonized trade codes, put in place in 2011 for the first time on a limited number of organic products, have started to provide data, albeit limited, on U.S. organic imports and exports. Meanwhile, the organic sector has diligently advocated for continued provisions for organic agriculture and funding for organic programs both in annual appropriations talks as well as in the new Farm Bill slated to be developed during 2012.

Organic market

The U.S. organic industry (food and non-food) grew at a rate of nearly eight percent in 2010, to reach nearly 29 billion US dollars (\$), according to findings from the Organic Trade Association's (OTA's) 2011 Organic Industry Survey. While total U.S. food sales grew by less than one percent in 2010, the organic food industry grew by 7.7 percent.

Survey results also showed that the U.S. organic industry is thriving and hiring. In 2010, 40 percent of surveyed organic companies reported positive full-time employment growth. Companies with fewer than five employees were least likely to add full-time employees (23 percent). About half of companies with more than 50 employees experienced positive full-time employment growth. What's more, in 2011, 46 percent of respondents anticipate an increase in employment over 2010 levels. In addition, 50 percent expect employment to remain even, and only five percent foresee a decrease.

Experiencing the most growth, organic fruits and vegetables, which represent 39.7 percent of total organic food value, and nearly 12 percent of all U.S. fruit and vegetable sales, reached nearly \$10.6 billion in 2010, up 11.8 percent from 2009 performance. Organic dairy, the second-largest category, experienced nine percent growth to achieve a value of \$3.9 billion, and captured nearly six percent of the total U.S. market for dairy products.

The lion's share of U.S. organic food sales—54 percent—are in mainstream grocers, club stores and retailers. Natural and specialty retailers capture 39 percent of total organic food sales, with direct and export sales representing the remaining 7 percent. Although still a small percentage of sales, farmers' markets, co-ops and community-supported agricultural operations continue to gain interest as consumers increasingly look for locally and regionally produced organic foods.

In the organic non-food sector, organic supplements led, with a value of \$681 million, representing 7.4 percent growth over 2009 figures. Organic fiber (linen and clothing) totaled a value of \$605 million, achieving 16 percent year-over-year growth. Personal care products, at \$490 million, increased 6.6 percent from 2009.

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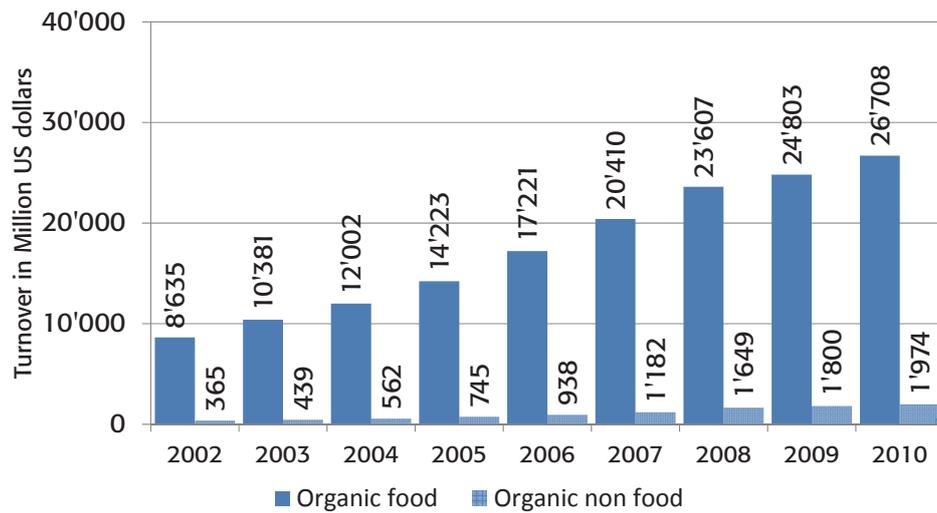


Figure 92: Total U.S. Organic Sales and Growth, 2002-2010

Source: Organic Trade Association's 2011 Organic Industry Survey: Executive Summary¹

The survey results, released in April 2011, estimated that organic food sales would grow by about 10 percent in 2011, and an additional 11 percent in 2012. Organic non-food sales, meanwhile, were expected to grow by 11 percent in 2011 and 12 percent in 2012.

Production

U.S. domestic production of certified organic products continues to grow, and organic imports may be expanding even faster. Overall, the latest official information concerning U.S. organic production is only available through 2008, when certified organic acreage in the United States reached more than 4.8 million acres (1.9 million hectares) in 2008, according to USDA's Economic Research Service (ERS). U.S. total organic cropland reached 2'655'382 acres (1'074'594 hectares) in 2008, while land devoted to organic pasture totaled 2'160'577 acres (874'355 hectares). ERS data are based on certified organic operations as reported by USDA-accredited certification agencies.

However, for this report, Catherine Greene, economist with USDA's Economic Research Service, provided the following updated information:

- Organic horticulture and dairy production continue to expand in the United States. Adoption of certified organic farming systems has been highest in the horticulture and dairy sectors, and they are also the top sectors in terms of market penetration. By 2008, when the most recent national organic production estimates of were published, certified organic vegetable acreage accounted for over eight percent of total vegetable acreage in the United States, and certified organic fruit acreage and milk cows accounted for about three percent of the total.

¹ The summary is available at <http://www.ota.com/pics/documents/OTA2011IndustrySurveyExecSummary.pdf>

- Organic dairy production in the United States has expanded substantially during the last five years. According to estimates from USDA's Agricultural Marketing Service, the total volume in U.S. sales of organic fluid milk products doubled between 2006 and 2011, reaching 2.1 billion pounds in 2011 and accounting for nearly four percent of the total. The volume in U.S. sales of organic fluid milk showed double-digit annual growth every year between 2006 and 2011 except in 2009. In contrast, the volume of conventional fluid milk sales decreased 2.4 percent between 2006 and 2011, and declined slightly in most years during most of this period. Although there are a few large organic dairies in the U.S., on average organic operations are substantially smaller than their conventional operations.
- California is the top state in horticultural production, and also leads the nation in certified organic horticultural production. One of the leading certification agencies in California, and the U.S., is California Certified Organic Farmers (CCOF). According to estimates from CCOF, certified organic fruit and vegetable production in California has also expanded substantially since 2006. Nearly 150,000 acres (60'702 hectares) of organic fruit and vegetables in California were certified by CCOF in 2010, up nearly 80 percent since 2006. Although CCOF certified fruit and vegetable acreage increased less than one percent in 2009, when the U.S. economy weakened, certified acreage showed double-digit growth every other year during this period.
- Organic fruit and vegetable acreage in other states is also likely to have increased recent years. For example, Washington is the top producing state specifically for organic tree fruit, including apples, pears, and cherries. Washington State University estimates that certified organic acreage of these three fruits in Washington doubled between 2006 and 2010, to nearly 19'000 acres (7'689 hectares) in 2010. However, annual growth was negative for both apples and cherries in 2010. Tree fruit managed organically accounts for a significant share of total tree fruit acreage in Washington, accounting for nearly 10 percent of total apple acres, 9 percent of pear acres and 6 percent of cherry acres.

Organic trade

In January 2011, the Commerce Department's U.S. Census Bureau for the first time broke out 23 trade codes for top U.S. organic exports and 20 trade codes for top U.S. organic imports. All but two of the trade codes for organic exports are for fresh fruits or vegetables, while most of the organic import codes are for coffee, soybeans, tea and other non-horticultural commodities. According to Census estimates, the U.S. exported \$339 million in mostly horticultural commodities between January and October 2011, and imported \$593 million in coffee and other commodities during this period.

Table 74: United States of America: Commodities exported January – October 2011

Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Product	Value (in Thousands of dollars)	Product Code
Organic Lettuce Not Head Fr/Ch	71,471	0095AT
Organic Grapes Fresh	39,701	0165AT
Organic Apples Fresh	32,096	0175AT
Organic Cherries Fresh	30,585	0195AT
Organic Tomato Sauce Ex Ketchp	20,387	0235AT
Organic Carrots Fr/Ch	19,347	0105AT
Organic Spinach Fr/Ch	17,307	0135AT
Organic Cauliflower Fr/Ch	16,253	0065AT
Organic Cult Blueberries Fresh	16,193	0215AT
Organic Strawberries Fresh	14,854	0205AT
Organic Oranges Fr/Dr	12,955	0145AT
Organic Coffee Roast Not Decaf	11,443	0225AT
Organic Broccoli Fr/Ch	9,098	0075AT
Organic Pears/Quince Fresh	6,041	0185AT
Organic Celery Fr/Ch	5,801	0115AT
Organic Lemons Fr/Dr	4,971	0155AT
Organic Tomato Other Fr/Ch	2,399	0045AT
Organic Peppers Fr/Ch	1,744	0125AT
Organic Head Lettuce Fr/Ch	1,607	0085AT
Organic Potatoes Fr/Ch Xsd Oth	1,533	0015AT
Organic Roma Plum Tomato Fr/Ch	1,060	0035AT
Organic Cherry Tomato Fr/Ch	1,019	0025AT
Organic Onion Sets Fr/Ch	793	0055AT
Total	338,659	

Table 75: United States of America: Consumption commodities imported January – October 2011

Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Product	Value	Product Code
Organic Coffee Arabica Nr Nd	373,991	0085AT
Organic Coffee Rst Nd <2Kg Ret	37,833	0115AT
Organic Soybeans Except Seed	35,550	0205AT
Organic Coffee N/Rst Nd Other	27,202	0095AT
Organic Coffee N/Rst Decaf	24,323	0105AT
Organic Rice Semi/Whol Milled	20,353	0195AT
Organic Avocado-Hslike Fr/Dr	13,695	0035AT
Organic Blk Tea Ferm Bag<3Kg	12,759	0175AT
Organic Grn Tea Not Flav<3K	11,951	0155AT
Organic Coffee Rst Nd Other	7,894	0125AT
Organic Apples Fr >22Cents/Kg	5,512	0045AT
Organic Coffee Rst Dec<2K Ret	5,290	0135AT
Organic Bell Peppers Greenhse	5,253	0015AT
Organic Grn Tea Not Flav Other	3,915	0165AT
Organic Pears Fresh Other Time	2,251	0065AT
Organic Cultiv Blueberries Fr	2,178	0075AT
Organic Pears Fresh 4/1-6/30	1,320	0055AT
Organic Bell Peppers Fr Other	952	0025AT
Organic Grn Tea Flav<3K	537	0145AT
Organic Durum Wheat Not Seed	461	0185AT
Total	593,222	

Notes for commodities during this period.

Table 74 and Table 75

1. Data Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

2. Organics-Selected: The organic product group only includes selected codes.

3. Organics-Selected: Beginning on Jan 1, 2011, selected U.S. import and export organic trade codes have been established.

4. Product Group: Organics-Selected

The top U.S. organic exports between January and October, 2011 were organic lettuce, valued at \$71 million, fresh grapes (\$40 million), fresh apples (\$32 million) and fresh cherries (\$31 million). Fresh organic carrots, spinach, cauliflower, blueberries, strawberries and oranges, along with tomato sauce and roasted coffee, were other top organic exports during this period, with approximately \$10 million to 20 million each in export value. Canada was the dominant market for U.S. organic exports, distantly followed by Mexico and Japan.

The top U.S. organic import between January and October, 2011 was Arabica coffee beans, which accounted for \$374 million of the total \$593 million in organic imports during this period. Organic imports of roasted and other types of coffee were valued at almost \$100 million during January through October 2011. Other U.S. organic imports include soybeans, valued \$36 million during this period, tea (\$29 million), rice (\$20 million), fresh avocado (\$14 million) and fresh apples (\$6 million). The top three U.S. organic suppliers were Colombia, Mexico, and Brazil.

As of December 2011, there were 93 certification agencies worldwide accredited to USDA's National Organic Program (NOP). Of that figure, 52 were domestically based, and 41 were from outside the United States. According to NOP's website, there were 30,490 operations certified for organic production and handling during the 2010 calendar year.

Data collection

Data collection is an ongoing need for the U.S. organic sector. Currently, USDA's National Agriculture Statistics Service (NASS) is encouraging all U.S. organic producers to complete the new 2011 Organic Production Survey. Funded by USDA's Risk Management Agency, this survey gives certified organic producers the opportunity to showcase their contributions to U.S. agriculture, and help ensure the continued growth and sustainability of organic farming in the United States.

Survey results will help shape decisions regarding farm policy, funding allocations, availability of goods and services, community development, and other key issues.

The 2008 Organic Production Survey found that the average production expenditures are higher for organic farms (\$171,978) than for all farms nationwide (\$109,359). The new information will help the USDA re-evaluate federal crop insurance programs to ensure USDA-certified organic producers receive equitable insurance rates and programs for the food and fiber they produce.

Meanwhile, other data collection is helping to prove the benefits of organic agriculture. For instance, a special Agricultural Resource Management Survey conducted by USDA has shown that organic wheat and all wheat producers had similar yields, on average, in 2009, but organic wheat producers received significant price premiums. As a result, the average gross value of production for organic wheat was \$110 per acre higher than for all wheat producers, the USDA's Economic Research Service data show.¹ (<http://www.ers.usda.gov/Data/CostsAndReturns/features.htm>).

Total costs on organic wheat acreage were about \$13 less per acre than for all producers, on average, due to lower operating costs. These yield, price and cost relationships resulted in average returns above total costs for organic producers of more than \$120 per acre above the average return for all wheat producers in 2009 (<http://www.ers.usda.gov/ChartsOfNote/Default.aspx>, posted on Tuesday, Dec. 6, 2011).

Government funding

In late November, the U.S. House of Representatives and U.S. Senate passed Fiscal Year 2012 Agricultural Appropriations. Agriculture appropriations for Fiscal Year 2012 total

¹ Economic Research Service (ERS) of the United States Department of Agriculture (USDA): Data sets: Commodity Costs and Returns: Features, Update November 1, 2011. The website of the ERS, Washington, available at <http://www.ers.usda.gov/Data/CostsAndReturns/features.htm>

\$19.9 billion, roughly \$100 million less than Fiscal Year 2011, and \$3.2 billion less than Fiscal Year 2010. However, programs important to the organic industry were spared from any cuts below Fiscal Year 2011 levels. Maintaining funds for organic programs at levels that are the same or higher than Fiscal Year 2011 in the current fiscal and political environment is a direct result of the efforts by the Organic Trade Association's membership to participate in the political process by attending Hill meetings at the April 2011 Policy Conference, and being willing to contact their members of Congress when needed.

The big hurdle for the organic industry during 2012 will be the development by Congress of the next Farm Bill. Although agricultural leaders offered a package to the congressional Super-Committee in late 2011 that would have protected and added to organic provisions that are in the current 2008 Farm Bill, the Super-Committee failed to offer a recommendation on a lower agriculture budget. As a result, the next Farm Bill will need to go through a lengthy, and perhaps contentious, process.

In preparation for this process, OTA has drawn up Farm Bill funding priorities, including:

- \$5 million over the life of the Farm Bill for technology upgrades for the National Organic Program (NOP)
- Authorized funding for NOP at \$10 million in FY2013, \$12 million for FY 2014, \$14.4 million for FY2015, \$17.28 million for FY2016, and \$20.736 million for FY17 authorized funding
- \$30 million annually mandatory funding, and \$25 million annually additional authorized funding, for the Organic Agriculture Research and Extension Initiative competitive grants program dedicated to organic
- \$5 million mandatory funding over the life of the Farm Bill, with an additional \$5 million annually authorized funding for the Organic Data Initiative which funds basic USDA data collection on the organic sector
- \$30 million total mandatory funding over the life of the Farm Bill for the National Organic Certification Cost-Share Program which offsets the costs of certification by providing reimbursement of no more than \$750 per year, capped at 75 percent of total certification costs

Report language directing the National Resources and Conservation Service to make funding through the Environmental Quality Incentives Program (EQIP) Organic Initiative more accessible to organic farmers.

Report language directing the Secretary to continue work on price elections for organic crops, remove premiums from crop insurance rates for organic farmers and create appropriate risk management tools that take into consideration the needs of the organic sector, including the diversity of organic farms.

Standards work

Through 2011, NOP posted its guidance on standards in its Organic Program Handbook, which is accessible on its website (www.ams.usda.gov/nop). This compilation of guidance documents, policy memos, and instructions is intended to clarify policies and assist those who own, manage, or certify organic operations with complying with NOP regulations.

For example, in May, NOP posted final guidance on the issues of compost and vermicompost; wild crop harvesting; commingling and contamination prevention; and the use of chlorine materials in organic production and handling.

Among other issues in the forefront during 2011 were the topics of residue testing as a means for compliance verification of the process-based organic standards, sunset review of various substances to determine whether they should be reapproved for use or disallowed in organic production, and livestock handling issues, including outdoor access for poultry.

Consumer attitudes

Seventy-eight percent – more U.S. families than ever before – are choosing organic foods, according to the U.S. Families' Attitudes & Beliefs 2011 Tracking Study released in November 2011 by the Organic Trade Association.

“In a time when the severity of the economy often means compromising on quality and values, it is extremely encouraging to see consumers including organic products in their shopping carts,” said Christine Bushway, OTA's Executive Director and CEO.

According to the study, four in ten families indicate they are buying more organic products than they were a year ago. The findings are in line with those in OTA's 2011 Organic Industry Survey released in April, which revealed that the U.S. organic industry grew at a rate of nearly eight percent in 2010, and was one of the few sectors of the U.S. economy that continued to add jobs.

Nearly half – 48 percent – of parents surveyed revealed that their strongest motivator for buying organic is their belief that organic products “are healthier for me and my children.” Other motivators for purchasing organic included concern over the effects of pesticides, hormones and antibiotics on children, and the desire to avoid highly processed or artificial ingredients.

Following decades of consumer marketing efforts by OTA and others in the organic community, 72 percent of parents are now familiar with the USDA Organic seal, up significantly from 65 percent in 2009. However, the study also found that three in ten U.S. families are new entrants to the organic marketplace. This figure is consistent with prior years' findings, and indicates a need for continued consumer outreach and education on the basic value proposition offered by organic agriculture and products.

Research findings

As Congress prepares to step up its work to shape a new Farm Bill during 2012, research findings recently released verify the profitability and benefits of organic agriculture.

The Rodale Institute's report, *The Farming Systems Trial: Celebrating 30 years*,¹ highlights the major findings from Rodale's long-term side-by-side field trial comparisons of organic and conventional systems. These findings, which prove the benefits of organic agriculture, show: 1) Organic yields match conventional yields; 2) Organic outperforms conventional in years of drought; 3) Organic farming systems build rather than deplete soil organic matter, making it a more sustainable system; 4) Organic farming uses 45 percent less energy and is

¹ Rodale Institute (2011): *The Farming Systems Trial: Celebrating 30 years*. The Rodale Institute, Kutztown. Available at <http://www.rodaleinstitute.org/files/FSTbookletFINAL.pdf>

more efficient; 5) Conventional systems produce 40 percent more greenhouse gases; and 6) Organic farming systems are more profitable than conventional.

Meanwhile, the Organic Farming Research Foundation (OFRF) released its own report documenting how organic farming is good for people, the environment, and the economy. The report, *Organic Farming for Health and Prosperity*, shows findings on how organic farming is good for human health, job creation, the economy, soil and water, for birds and bees, and for slowing climate change. The report also makes five recommendations directed at agricultural policy makers: expand organic research funding, ensure fair and appropriate risk management tools, meet market demand, create a robust organic transition assistance program, and reward environmental benefits.

Still other information analyzed 18 years of crop yield and farm management data from a long-term University of Minnesota trial. The findings show that an organic crop rotation was consistently more profitable and carried less risk of low returns than conventional corn and soybean production, according to research published in the September-October issue of the *Agronomy Journal*¹. Study leader Timothy Delbridge, a University of Minnesota doctoral student in agricultural economics, said the research didn't take into consideration the difficulties and cost of transitioning to organic. However, the results offer convincing new evidence that going organic will be lucrative over the long haul. A pdf of the research article is available for download.

In addition, 13 years of data from a side-by-side comparison at Iowa State University's Neely-Kinyon Research and Demonstration Farm has proven that organic crop systems can provide similar yields and higher economic returns than a conventional corn-soybean rotation. The Long-Term Agroecological Research Experiment,² which began in 1998, shows that organic crops can remain competitive with conventional crops even during the three-year transition. In addition to profitability, the trials have shown organic agriculture helps build healthy soils.

Moreover, an interdisciplinary team of researchers from the University of Minnesota, McGill University, University of California at Santa Barbara, University of Wisconsin, Arizona State University, Stockholm University and the University of Bonn have published an analysis in the Oct. 20, 2011, edition of *Nature* outlining solutions for a cultivated planet to meet growing food needs. They wrote, "To meet the world's future food security and sustainability needs, food production must grow substantially while, at the same time, agriculture's environmental footprint must shrink dramatically." Among their findings: "Conventional approaches to intensive agriculture, especially the unbridled use of irrigation and fertilizers, have been major causes of environmental degradation. Closing yield gaps without environmental degradation will require new approaches, including reforming conventional agriculture and adopting lessons from organic systems and precision agriculture."

¹ Delbridge, Timothy A., Jeffrey A. Coulter, Robert P. King, Craig C. Sheaffer, and Donald L. Wyse (2011) Economic Performance of Long-Term Organic and Conventional Cropping Systems in Minnesota *Agronomy Journal*. *Agronomy Journal*, Volume 103, Issue 5, 2011, Available at <https://www.agronomy.org/publications/aj/view/103-5/aj10-0371-pub.pdf>. Information available at <https://www.agronomy.org/story/2011/sep/thu/organic-farming-profitable-long-term>

² The Long-Term Agroecological Research Experiment at the website of the Leopold Center for Sustainable Agriculture. Available at <http://www.leopold.iastate.edu/pubs-and-papers/2011-11-ltar-experiment>

Equivalency update

For some time, officials from the United States and European Union have been exploring an equivalency agreement concerning their organic standards. In December 2011, the European Commission's Standing Committee on Organic Farming (SCOF) in Brussels approved a framework for an organic equivalence arrangement between the world's two largest markets for organic food.

Under the proposed arrangement, the European Union (EU) and United States will work together to promote strong organic programs, protect organic standards, enhance cooperation and facilitate trade in organic products. The Organic Trade Association (OTA) fully supports this initiative, and believes the new EU - U.S. organic equivalence cooperation arrangement will provide expanded market access, reduce duplicative requirements, and reduce certification costs while protecting organic integrity. OTA's EU-U.S. Trade Task Force has identified an organic equivalence arrangement as the top priority to enhance trade in organic products and provide long-term opportunities for U.S. organic producers and handlers.

As of this writing, the U.S. government is conducting legal and technical reviews of the proposed arrangement and preparing the documentation and notification necessary to finalize the arrangement. Both sides hope to finalize the arrangement early in 2012.

Further reading and links

- Agronomy Journal: <https://www.agronomy.org/story/2011/sep/thu/organic-farming-profitable-long-term> and September-October 2011(pdf: <https://www.agronomy.org/publications/aj/view/103-5/aj10-0371-pub.pdf>)
- Iowa State University's Neely-Kinyon Research and Demonstration Farm: Side-by-side comparison, (<http://www.leopold.iastate.edu/pubs-and-papers/2011-11-ltar-experiment>)
- Nature, Oct. 20, 2011, article on solutions for a cultivated planet to meet growing food needs
- Organic Farming Research Foundation (OFRF), Organic Farming for Health and Prosperity, available at <http://ofrf.org/publications/OrganicFarmingforHealthandProsperity.pdf>
- Organic Trade Association online resource listing the organic products for which there are trade codes: http://www.ota.com/GlobalMarkets/Trade_Equivalency.html
- Organic Trade Association: U.S. Families Organic Beliefs & Attitudes 2011. Tracking Survey. Information available at <https://www.ota.com/bookstore/2.html>
- Organic Trade Association's 2011 Organic Industry Survey, April 2011, available at <http://www.ota.com/pics/documents/2011OrganicIndustrySurvey.pdf>
- Rodale Institute's report, The Farming Systems Trial: Celebrating 30 years, available at <http://www.rodaleinstitute.org/files/FSTbookletFINAL.pdf>
- USDA's National Organic Program: <http://www.ams.usda.gov/nop>
- USDA's Economic Research Service: www.ers.usda.gov/, search for "organic"
- USDA's Foreign Agricultural Services' Global Agricultural Trade System, available at www.fas.usda.gov/gats/default.aspx

Acknowledgement

Special thanks to Catherine Greene of the U.S. Department of Agriculture's Economic Research Service for her contributions to this update.

Canada

MATTHEW HOLMES¹ AND ANNE MACEY²

Organic market

Through 2010 and 2011, the Canadian organic market continued to show signs of solid growth and consumer confidence, following the introduction of mandatory federal regulations for organic in 2009. Using limited data on organic imports and sales of fresh products, the Canada Organic Trade Association has estimated that the Canadian consumer market was valued at 2.6 billion Canadian dollars by the end of 2010. This represents a 60 percent increase over the most recent market benchmark (2008), conducted prior to the recession and before the mandatory system came into effect.

June 2011 was also notable as the end to Canada's "stream of commerce" policy, at which point the 2009 federal law came into full effect. This had an impact throughout the supply chain, but particularly on some imports and on packaging. As discussed in the North American overview, 2011 was also significant for the announcement of the EU-Canada equivalency agreement. However, there is still a strong desire within the Canadian organic sector to see the terms of this agreement improved to include the Canadian processing sector.

Organic production

Unfortunately, significant data collection challenges were encountered in attempting to measure organic production in 2010. The Canadian competent authority has not yet implemented mandatory data collection through its accredited certifying bodies, and many of these bodies use different data and collection methods, making aggregation difficult. Compounding this, some certifiers failed to provide any data for 2010, leaving gaps that make an understanding of the entire country's production next to impossible. The organic sector is encouraging certifiers to use a more harmonized system for data collection and sharing, while also pressuring the Canadian Food Inspection Agency (CFIA) to put in place consistent and long-term data collection. For the authors, it is very disappointing that after eight years of tracking changes in acreage, the numbers are not available for 2010.

What the available data has revealed, is a decline in organic producer numbers in important growing regions, such as the Prairies. It is not known what impact this has had on the overall organic acreage in the country, though it is presumed that this has also declined. However, it is worth noting that in some regions, producer numbers have declined while acreage has actually increased. The only complete data for 2010 is that for Quebec and Ontario, with both provinces showing increases in acreage from 2009. An additional 1'108 hectares (2'738 acres) were reported in Quebec for 2010 (2.7 percent) and 3'139 hectares (7'756 acres) in Ontario (6.7 percent). Some of the Ontario increase may be due to the fact that for one certifier only a rough estimate was provided in 2009. As a point of reference, in 2009 Canada had 695'463 hectares (1'718'468 acres) in production and 210'231 hectares (519'474 acres) of land for wild-harvest and pasture.

¹ Matthew Holmes, Executive director, Canada Organic Trade Association (COTA), PO Box 6364, Sackville, NB E4L 1G6, www.otacanada.com.

² Anne Macey, Canadian Organic Growers (COG), www.cog.ca

Table 76: Canada: Organic farms, processors and handler 2009 and 2010

Province	Primary producers 2009	Primary producers 2010	% change primary producers	Farms in Transition	Processors ¹	Handlers ²
British Columbia	475	471	-0.8%	62	124	57
Alberta	319	275	-10.6%	1	59	15
Saskatchewan	1'123	938	-16%		72	3
Manitoba	168	158	-5.9%		34	3
Ontario	716	685	-4.3%	33	248	18
Quebec	956	1'054	10.25%	96	291	143
New Brunswick	56	56	0	1	13	1
Nova Scotia	47	43	-8.5%	2	20	2
Prince Edward Island	48	43	-10.4%	2	6	3
Newfoundland	2	2	0		3	0
Yukon	4	6	50%		0	0
Northern Territories		1			0	0
Totals	3'914	3732	-4.6%	197	870	245

Source: Canadian Organic Growers 2010-2012

Table 77: Canada: Certified acreage by province: grey shaded = data incomplete

Province	Farmed land		Wild land for harvesting/pasture	
	Hectares	Hectares in transition	Ha	
British Columbia	5082	?	?	Acreage data only available for 50% of operators.
Alberta	11900	?	?	Acreage data only available for 57% of operators. Wild land includes native pasture/ crownland for cattle range.
Saskatchewan	197407	?	?	Acreage data only available for 53% of operators
Manitoba	10137	?	?	Acreage data only available for 23% of operators.
Ontario	49'909	2'320	4'707	Data from 100% of operators
Quebec	42'492	3'609		Data from 100% of operators except Wild blueberries & maple forest not included.
New Brunswick	?	?	3'250	Numbers under wild land are Maple forest acreage from 2009 which is not considered to have changed significantly.
Nova Scotia	?	?		
Prince Edward Island	906.5	?		Data from 23% of operators
Newfoundland, Yukon and Northern Territories	?	?	?	

Source: Canadian Organic Growers 2011

¹ Includes food manufacturers & seed cleaners² Includes packers, brokers & retail

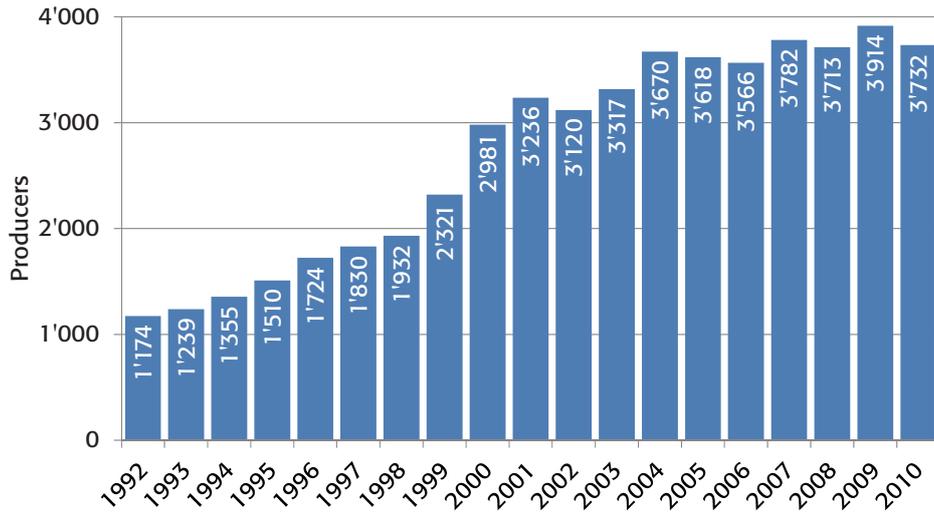


Figure 93: Canada: Certified organic farms 1992-2010

Source: Canadian Organic Growers 1992-2012

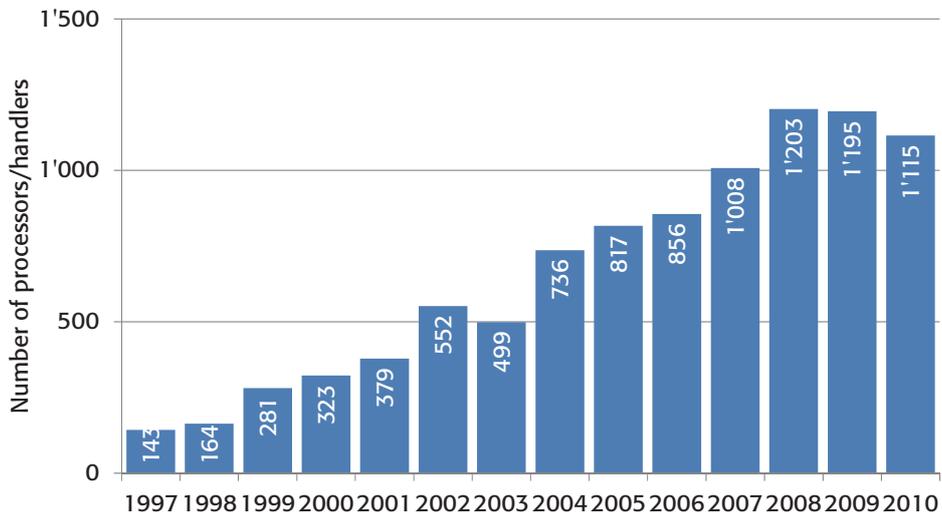


Figure 94: Canada: Development of certified organic processors and handlers 1998-2010

Source: Canadian Organic Growers 1997-2012

Overall, there were 182 fewer certified farms/primary producers reported in 2010 compared with 2009. The greatest decline occurred in the Prairie provinces, and likely for a number of different reasons: the record-high grain prices of 2007-08 were closely followed by the retraction and recession in 2009 and 2010, which impacted the grains sector more than many others. This, coupled with competitive pressures, high conventional commodity prices (drawing some producers away from organic), and challenges within the market place (such as the increase in “natural” products using conventional ingredients) likely all contributed in some way to the present situation.

Another aspect of this producer decline, in Canada, is linked to the fact that small growers who only market within the limits of their home province do not have to comply with the federal regulations (unless their province adopts regulations consistent with the federal rule). As a result, it is suspected that many have chosen to forego certification, while still representing their products as organic in the local marketplace. The competition between certified and uncertified organic, under a regulatory system, which requires the majority to be fully compliant, is an acute concern for the Canadian organic sector. There is a strong push on the provincial governments to work with CFIA to close the loophole and adopt organic regulations.

Significantly, the only province with a mandatory organic regulation in place, Quebec, is the only one to consistently show growth in production and acreage. As of 2010, Quebec now has the largest number of organic growers in the country, following the significant decline (16 percent) in grower numbers in Saskatchewan. In Ontario, although numbers show a decline of 4.3 percent from 2009, the acreage reported as being under organic management has increased by 6.7 percent.

The number of certified processors and handlers appears to have dropped slightly from 1'195 in 2009 to 1'115 in 2010. However, this may have more to do with how operations are classified and the fact that service providers are not certified under the Organic Products Regulations than with any real differences. In Quebec, the number of certified processors continues to increase each year.

Highlight

Canadian Organic Growers and the Canada Organic Trade Association again held Canada's second Organic Week from Oct. 15–22, 2011, with hundreds of community events and participating retailers helping to showcase organic products and practices to consumers across the country. A social media element and strong web presence were also included in the national campaign, as was a six-page feature section in the national newspaper, *The Globe and Mail*.

In conjunction with Organic Week, COTA (Canada Organic Trade Association) organized the second Parliament Day on October 18, 2011. The morning conference included a number of speakers on marketing and government relations, as well as a keynote by Elizabeth May, the first federally elected Member of Parliament from the Green Party of Canada. Participants then held a series of meetings with Members of Parliament and the Senate to issues important to the organic sector. The day ended with the organic sector hosting MPs and Senators for an all-organic reception on Parliament Hill. Following this event, three senior representatives of the organic sector, speaking for the Canadian Organic Growers, Canada Organic Trade Association, and Organic Federation of Canada, were all

invited to appear before the House Standing Committee on Agriculture to testify on needs and priorities for organic under the coming five-year agricultural policy framework.

Also of note, the province of Quebec announced in late 2011 that it would shelve its provincial organic standards and adopt the national organic standards in January 2012, thereby helping to harmonize and streamline the regulatory system for organics in the country.

Research

The Organic Agriculture Centre of Canada continued its work on the Organic Science Cluster, a multi-year project funded by 6.5 million Canadian dollars in Canadian government funds, and 2.2 million Canadian dollars in industry contributions. (See: *The World of Organic Agriculture 2011: Canada* for more information on this project.) The Organic Agriculture Centre of Canada with OFC also began preparing for the first Canadian Organic Science Conference to be held early in 2012.

A study commissioned by Agriculture and Agri-Food Canada's Organic Value Chain Roundtable, was published in the journal *Sustainability*. "The Carbon and Global Warming Potential Impacts of Organic Farming: Does It Have a Significant Role in an Energy Constrained World?" by Dr. Derek Lynch, Canada Research Chair in Organic Agriculture, et al., analyzed 130 studies to compare farm-level energy use and global warming potential (GWP) of organic and conventional production sectors. Cross-cutting issues such as tillage, compost, soil carbon sequestration and energy offsets were also reviewed. Finally, the authors contrasted energy and GWP data from the wider food system to conclude that the evidence strongly favors organic farming with respect to whole-farm energy use and energy efficiency both on a per hectare and per farm product basis.¹

Challenges

Late in 2011, the government began consulting with stakeholders relating to two areas that have historically represented significant concern for the organic sector.

In the first, the government was seeking input on a proposed import policy for unapproved genetically engineered crops based on "low-level presence"—that is, permitting GMOs that the Canadian government has not approved but which show up only at low levels and "unintentionally" in product imports. They are seeking a policy, which will allow such occurrences without an automatic compliance mechanism or product removal. The organic sector unanimously rejected this proposed policy as exposing the organic sector to increased impacts and risk from GE crops.

In the second, a more favorable position was taken in draft guidelines being consulted on by the government concerning "natural" claims on meat and animal products. The organic sector supported the government's conclusion that products which result from animal husbandry which uses hormone or antibiotic treatment, or which removes animals from their natural state, behavior and environment cannot be considered "natural" products.

¹ Lynch, Derek H.; MacRae, Rod; Martin, Ralph C. 2011. "The Carbon and Global Warming Potential Impacts of Organic Farming: Does It Have a Significant Role in an Energy Constrained World?." *Sustainability* 3, no. 2: 322-362. Information is available at <http://www.mdpi.com/2071-1050/3/2/322/>

Finally, the challenge of finding some mechanism by which the Canadian organic sector can maintain and update its national organic standards is a very real concern. Given the mood of fiscal restraint in Ottawa, the standards are currently viewed as an expense to be borne by the organic sector exclusively. Many in the sector, on the other hand, feel that in order to ensure we meet our obligations under the domestic regulations, but also our equivalency agreements with trading partners, we must have a transparent system with public sector commitments that ensures the standards can be reviewed, evaluated, and updated on an ongoing basis into the future.

Expanding production and supply

There are a number of efforts underway to expand production and supply in Canada, and to promote domestic organic products. However, it must also be noted that we are only now encountering the mystery of a serious dip in the number of producers, requiring further investigation.

In the area of aquaculture, the draft Canadian organic aquaculture standards have undergone a second public consultation and balloting process. The standards are very close to EU organic aquaculture standards, and have also introduced basic metrics for evaluation and compliance, which aim to minimize potential negative environmental impacts. There is still vocal concern being expressed by the Canadian environmental community, and it remains to be seen whether the standards will see themselves brought in under the scope of the federal regulations or continue to undergo consultation and adjustment.

A couple of initiatives were also started in 2011 to develop a domestic brand for Canadian organic products (through the work of the Organic Value Chain Roundtable), as well as provide Canadian organic export products with the resources and brand attributes to differentiate themselves in the international market (through an announced 200'000 Canadian dollars in support to COTA through Agriculture Canada's AgriMarketing program).

Outlook

All aspects of organic in Canada continue to develop despite a number of internal contradictions and challenges. Consumer demand is strong, and the market proves itself to be robust and resilient in times of adversity. Canada has also been one of the most progressive leaders of the new era of organic equivalency and harmonization, achieving trade recognitions that few have been able to achieve before now. However, despite these favorable conditions, the sector is seemingly still in the early days of domestic capacity development and must grow past the fragmentation and regionalism that the historic lack of a national system has allowed to happen. With the national regulatory framework now firmly in place for the sector to build upon, and the world's best organic markets within easy reach, with a few adjustments and commitments the Canadian organic sector should be able to grow well into the future.

Organic Agriculture in North America: Graphs

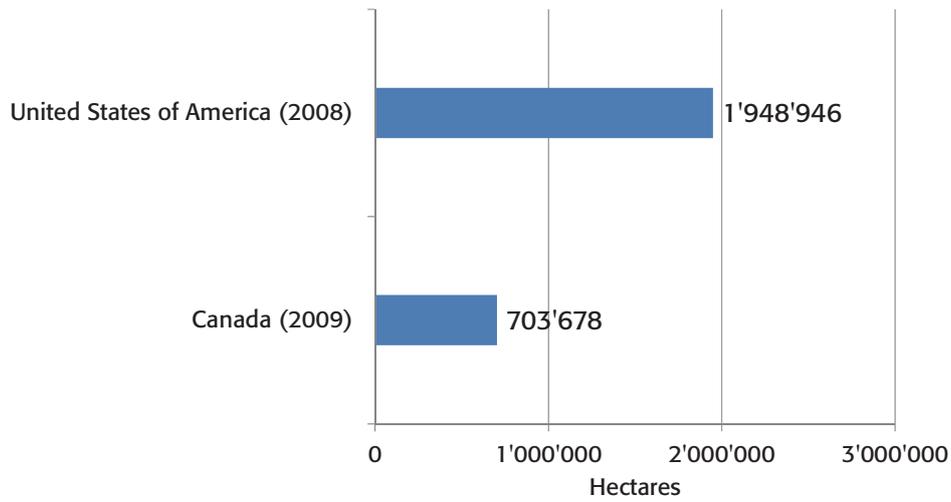


Figure 95: North America: Organic agricultural land in Canada (2009) and the United States (2008)

Source: Canadian Organic Growers and United States Department of Agriculture

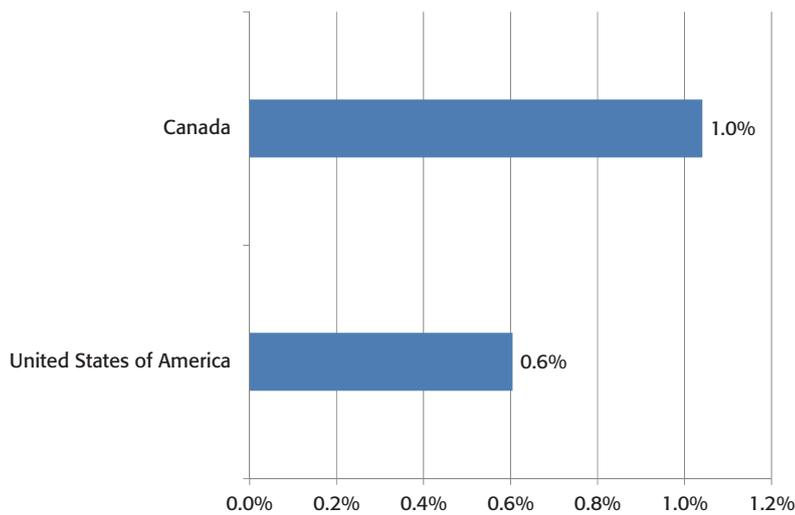


Figure 96: North America: Organic share of total organic agricultural land in Canada (2009) and the United States (2008)

Source: Canadian Organic Growers and United States Department of Agriculture

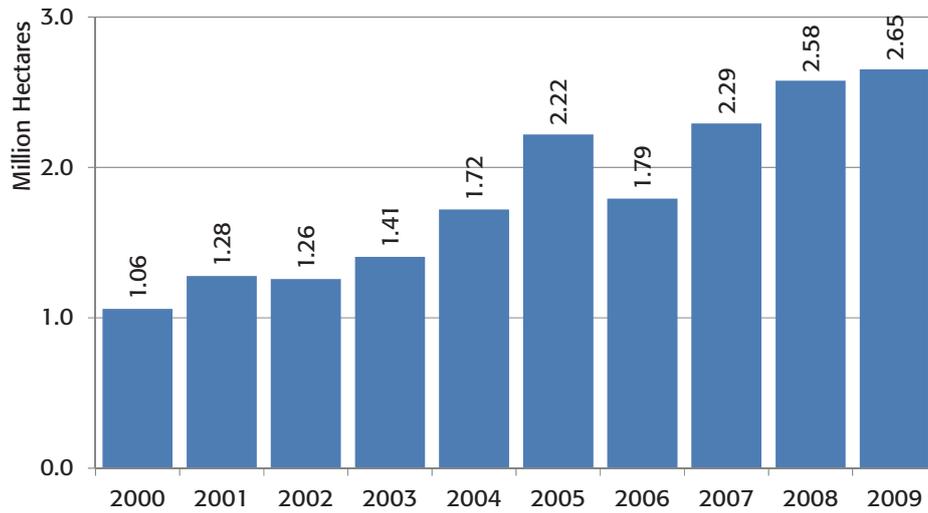


Figure 97: North America: Development of organic agricultural land 2000-2009 (for the US the latest available data are from 2008, for Canada from 2009)

Source: Canadian Organic Growers and United States Department of Agriculture

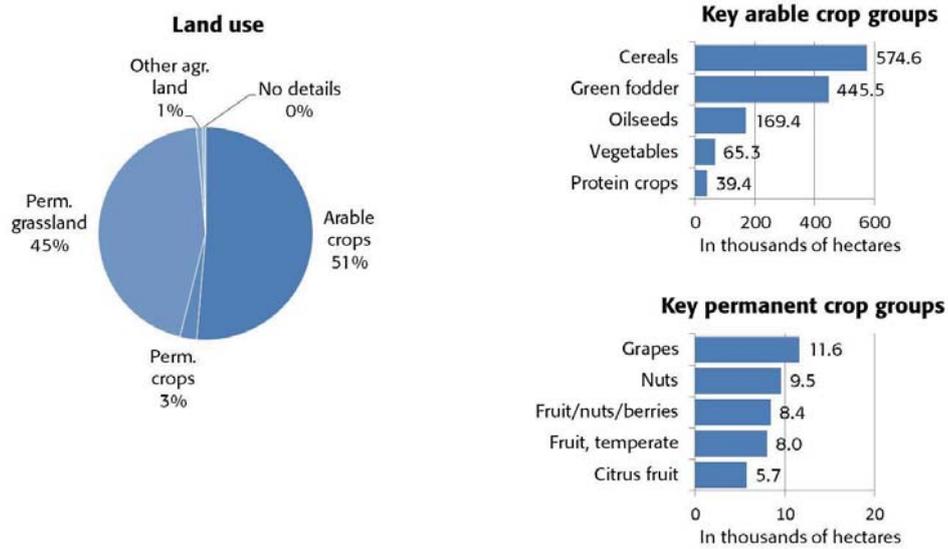


Figure 98: North America: Land use in organic agriculture 2009 (for the US the latest available data are from 2008, for Canada from 2009).

Source: Canadian Organic Growers and United States Department of Agriculture

Organic Agriculture in North America: Tables

Table 78: North America: Organic agricultural land, share of total agricultural land and number of producers

Country	Agr. Land [ha]	Share of total agr. land	Producers
Canada	703'678	1.04%	3'929
United States of America	1'948'946	0.60%	12'941
Total	2'652'624	0.68%	16'870

Source: Canadian Organic Growers and United States Department of Agriculture

Table 79: North America: All organic areas

Country	Agriculture [ha]	Wild collection [ha]	Total [ha]
Canada	703'678	210'231	913'909
United States of America	1'948'946		1'948'946
Total	2'652'624	210'231	2'862'855

Source: Canadian Organic Growers and United States Department of Agriculture

Table 80: North America: Land use in organic agriculture

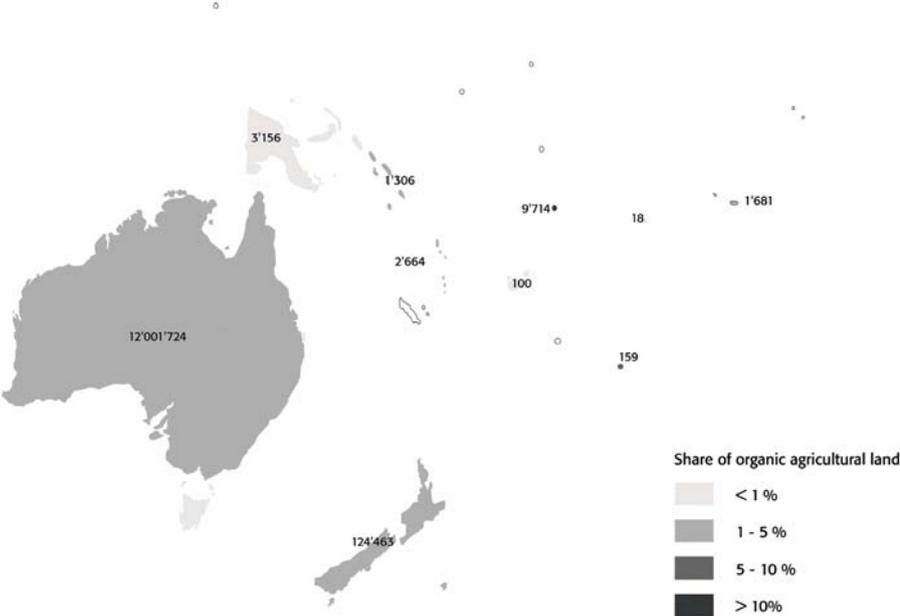
Main use	Crop category	Northern America
Agricultural land and crops, no details	Agricultural land and crops, no details	12'321
Arable crops	Cereals	574'611
	Flowers and ornamental plants	106
	Green fodder from arable land	445'489
	Medicinal and aromatic plants	5'489
	Mushrooms and truffles	55
	Oilseeds	169'385
	Protein crops	39'409
	Root crops	3'942
	Textile crops	7'393
	Vegetables	65'264
Arable crops total		1'311'143
Cropland, no details	Cropland, no details	97'561
Other agricultural land	Fallow land, crop rotation	23'338
	Home gardens	
Other agricultural land, total		23'338
Permanent crops	Berries	4'434
	Citrus fruit	5'692
	Fruit, temperate	8'023
	Fruit, tropical and subtropical	3'595
	Fruit/nuts/berries	8'401
	Grapes	11'577

NORTH AMERICA: TABLES

Main use	Crop category	Northern America
	Nurseries	596
	Nuts	9'533
	Other permanent crops	12'721
	Tea/mate, etc.	
<i>Permanent crops total</i>		64'572
<i>Permanent grassland total</i>		1'143'689
Total		2'652'624

Source: Canadian Organic Growers and United States Department of Agriculture

Oceania



Map 7: Organic agricultural land in the countries of Oceania 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Organic Farming in Australia¹

Els Wynen² and Alexandra Mitchell³

Size of the industry

No new data on the size of the industry have been published since 2009. For that year the area under organic management was estimated to be 12'001'724 hectares (Mitchell et al. 2010), based on figures from the Australian Quarantine Inspection Service (AQIS). This represented 2.9 percent of the total agricultural area of 409 million hectares in Australia in 2009 (FAOSTAT 2011), for which 2'129 producers were certified. From next year, the problem with data availability on organic producers and production in Australia may be ameliorated by the collection of data on organic agriculture by the Australian Bureau of Statistics (ABS). There will also be another issue of the Australian Organic Market Report, and it will be interesting to compare the census results (ABS) with those of a survey (Marketing Report).

Standards and Certification

The Australian Standard for Organic and Biodynamic Products (AS6000), adopted in 2009, is not legally mandatory. However, it can assist Australia's regulatory authorities, such as the Australian Competition and Consumer Commission, to use existing regulatory laws (such as the Trade Practices Act) to challenge in court those who claim to be organic. There have been no legal challenges based on AS6000 to test this—neither for domestically-produced nor imported organic products.

Now that the AS6000 has been published, industry and AQIS are working towards a situation where one standard can be used for the domestic and export market. Not doing so would mean a doubling of cost for maintaining two sets of standards, one set by the certifiers (National Standard, mandatory for organic exports) and one by stakeholders of the whole of the industry (Australian Standard). In the interim, the certification agencies and AQIS have agreed to maintain use of the current National Standard. There has been limited uptake of the AS6000 in lieu of the National Standard (export standards), but some new operations have adopted this standard for products produced for the domestic market only.

One of the issues of great importance in the industry at present is that of the suspension of the certification of an organic farm in Western Australia. This action was taken by the certifier on the grounds that the organic farm was contaminated by genetically modified (GM) canola—allegedly from the neighboring farm. Legal action has been taken, where the organic farmer is suing the conventionally farming neighbor.⁴

¹ Thank you to Dr Paul Kristiansen, University of New England, for his comments.

² Dr. Els Wynen, Eco Landuse Systems, Canberra, Australia, www.elspl.com.au

³ Alexandra Mitchell, School of Rural Science and Agriculture, University of New England, Armidale, NSW Australia

⁴ See also website of the Steve Marsh Benefit Fund: stevemarshbenefitfund.com.au/

Market

No new market data are available. Past market reports are summarized in Table 81. They are discussed in the chapter by Wynen et al. (2011) in the previous edition of “The World of Organic Agriculture.”

Table 81: Australia: Values of organic production: 2001–2009

	Year	Total (Million Australian dollars)	Beef as share of total (%)	Fruit, vegetables and grain as share of total (%)	Total (Million Australian Dollars)
Wynen (2003)	2000/1	89	36.0	51.0	106
Halpin (2004)	2003	140	40.9	49.5	
Kristiansen et al. (2008)	2007	231.5	13.7	57.7	623
Mitchell et al. (2010)	2009	223.2	15.4	58.2	947

Hungry Jack's¹, a large food chain, has begun serving organic beef burgers in its 345 restaurants. The beef is sourced from OBE Organic, which was founded in the early 1990s by a group of Australian pastoral families and is Australia's largest organic meat producer. It consists of 20 members owning a combined cattle herd of 70'000 to 90'000 on more than seven million hectares (OFA 2011a).

The Organic Expo² is now an established annual event, taking place around August in Sydney or Melbourne). In 2011, over 180 exhibitors took part in Sydney.

Over the last few years, some consumer studies have been carried out. Mitchell et al. (2010) report that around 60 percent of Australian households surveyed in a random sample of 1,099 consumers nation-wide reported to have bought at least one organic product in the last twelve months. Pearson (2011) showed that of the 163 self-selected food shoppers in Canberra, 96 percent were concerned about leading a more environmentally friendly lifestyle. Just over half of those (56 percent) thought about the environment when making food related choices—though no data were gathered regarding the purchase of organic food.

Another recent survey on consumer attitudes in two places in Australia, Canberra, and Armidale, indicates that, of the 21 participants selected from a larger (national) sample, barriers and facilitators at the point of purchase have an important influence on translating the intention to buy organic food into actual purchases of such goods (Henryks 2011). Primary factors such as visibility, location and access of organic choices, familiarity with organic products, availability of organic products, appearance, packaging, price, and labeling all contribute to the choice of purchasing organic.

¹ Hungry Jack's website: www.hungryjacks.com.au/.

² Organic Expo website: sydney.organicexpo.com.au

Policy

There is increased recognition of the contribution of organic food in maintaining and improving the health of the population, with many school programs now including significant funding for school garden programs. The Organic School Gardens Program was launched in May 2010 by the Biological Farmers of Australia (BFA). This is a free education program that makes resource materials available to all Australian primary schools and any stakeholders with an interest in organic gardening. It does not include infrastructure or maintenance costs of setting up gardens. Many State and Commonwealth education and health departments are showing an increase in co-funding of such initiatives.

There has been no change in policy or programs by State or Federal Governments to financially supporting conversion of farming operations; i.e. there is no direct government support for organic farmers.

One of the most important Australian Government initiatives, the National Food Plan (NFP), is to develop a comprehensive strategic plan to guide national policy on several of the most important industries, including food. It is needed to replace the current ad hoc, uncoordinated and at times conflicting maze of regulations and policies. The OFA (2011b) has put in a submission to help shape this Plan.

There has been increased recognition of the uniqueness of organic systems with an increase in drafting options for treatment specifically of organic farms in State Government bio-security documentation and spraying regulations at least in some states, such as Victoria and Tasmania.

Research and extension

The Australian organic industry is represented by the peak body, the Organic Federation of Australia (OFA)¹, established in 1997 with the primary aim of working with all parts of the organic industry.

In early 2010, the OFA set up the Environmental Research and Educational Trust to attract increased funding for organic agriculture, to help Australian farmers to produce high quality organic food and to develop Australia's marketing system for organic produce. This Trust has developed three projects on which it wants to focus, one for consumers (information), one for producers (tailor-made compost); and one for the general public (what is organics?).²

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¹ See www.ofa.org.au for further information about the Organic Federation of Australia (OFA).

² See organictrust.ofa.org.au for further information about the Organic Trust.

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The Pacific Islands

KAREN MAPUSUA¹

Recent developments

In 2010, the International Organic Accreditation Service (IOAS) assessed the Pacific Organic Standard (POS) and found it, after some corrective actions, to be equivalent to the requirements of the European Union regulations EC 834(2007) and EC 889(2008). This means that according to the IOAS, the POS is suitable for use by conformity assessment bodies in the Pacific region as a standard for the certification of operators who may wish to export products to the European Union. The year 2011, however, brought little progress in the international recognition of the POS or in developing the organic guarantee system so that the POS can be used for certification.

The slow progress is largely due to a lack of funding support for these developments and delays in funding for establishing the secretariat of the Pacific Organic and Ethical Trade Community (POETCom) within the Secretariat of the Pacific Community (SPC) in Fiji.

The year 2010 also saw the Pacific region's first Participatory Guarantee System (PGS) become operational in New Caledonia. The PGS uses the Pacific Organic Standard (POS) as its production standard. The PGS "BioCaledonia" was developed in a joint project by the Chamber of Agriculture and Arborfruits—a fruit farmers association. Producers and consumers were involved in working groups to define the PGS scheme and the certification process. Official institutions have also recognized this system as it includes an external controller. BioCaledonia applied to the Pacific Organic and Ethical Trade Community (POETCom) for the license to use the Organic Pasifika PGS logo. It was deemed they met all requirements, and this has been granted. A one-year review is now due for this program, but again, this is being constrained by a lack of resources. Therefore, volunteers within the POETCom network are being sought to undertake this work.



Figure 99: Organic Pasifika PGS logo

In 2011, development began for a Participatory Guarantee System (PGS) in the Leeward Islands (French Polynesia), and initial training has been completed.

¹ Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

History

Organic agriculture is not a new concept in the Pacific; it is very much the traditional farming system that Pacific forefathers practiced sustainably for centuries. Today, current farming practices in many communities are still based on “age-old” systems that are free from the residues of agrichemicals and where environmental integrity remains largely intact. However, the motives for organic farming have changed. In the past, farming was predominantly for subsistence living. However, in the cash driven societies that we live in today, overseas markets require products that are labeled and sold as organic, to also meet international standards. While third party certification began in the Pacific in the late 1980s, it has been slow to develop.

The organic movement in the Pacific recognized that one of the major challenges facing Pacific Island organic producers is the high cost of certification, auditing and compliance involved in meeting the organic standards of importing countries or international standards. In order to address this issue, two projects commencing in 2007 have been undertaken, funded by the International Fund for Agricultural Development. They were implemented by the International Federation of Organic Agriculture Movements (IFOAM) and the Secretariat of the Pacific Community (SPC) respectively. The main outcomes of these projects were a) an analysis of the existing situation of organic agriculture and fair trade production in the Pacific islands and b) a set of Pacific Regional Standards for Organic Agriculture Products, which was developed through a locally owned process and multi-sector participation. These projects also facilitated the development of a regional strategy and national plans to lay the foundation of sustainable organic agriculture development in the region. Two key groupings that were tasked with driving organics forward in the Pacific were formed: the first, the Regional Organic Task Force (ROTF) is a technical group representing all sectors and countries involved in organics. This group was charged with developing the Pacific Standard and will be responsible for implementing the Regional Action Plan. The second group, the Pacific High Level Organics Group (PHLOG), consists of Pacific leaders who have shown a commitment to the development of organic agriculture in the region and who provide high-level political support and advocacy.

The first Pacific Organic Standard was officially launched by the Chair of the Pacific High Level Organics Group (PHLOG) and the Prime Minister of Samoa at the Ministers’ of Agriculture and Forestry Conference in Apia Samoa in September 2008. This now provides a platform for further regional policy development around organic agriculture.

In 2009, the Regional Organic Task Force (ROTF) recognized the need to evolve from a technical body to a peak representative body for organics and fair trade in the region. Therefore, the Pacific Organic and Ethical Trade Community (POETCom) was formed. POETCom, which will remain housed in the Secretariat of the Pacific Community, is currently in the process of developing its governance and management structure. It is hoped that a coordinating officer will be in place in the Secretariat of the Pacific Community (SPC) by the end of 2011 to move this process forward.

Key actors

Developments in organic agriculture are being spearheaded by the Pacific High Level Organics Group (PHLOG), the Secretariat of the Pacific Community (SPC), the Pacific Organic and Ethical Trade Community (POETCom) and the POETCom members, as well as lead organic organizations/NGOs in each Pacific Island country including:

- BioCaledonia, New Caledonia
- Bio Fenua, French Polynesia
- Farm Support Organisation, Vanuatu
- Fiji Organic Association, Fiji
- Kastom Garden Association, Solomon Islands
- Niue Organic Farmers Association
- Pacific Spices, Papua New Guinea
- Titikaveka Growers Association, Cook Islands
- Tonga National Youth Congress, Tonga
- Women in Business Development Incorporated, Samoa

The movement remains farmer and farm support organization driven with support building from national governments as awareness of the potential for organics increases. Regional research and academic institutions are also engaged, including the University of the South Pacific and the National Agricultural Research Institute of Papua New Guinea.

Market and trade

Export

Most of the organically certified products from the region are for export.

The following summary table lists the main crops which are currently organically certified and exported from the Pacific region.

Table 82: Main certified organic export crops in the Pacific region

Products	Countries
Vanilla & other spices & nuts	Fiji, Vanuatu, Niue, Samoa
Cocoa	Vanuatu, Samoa, Papua New Guinea
Virgin Coconut Oil	Samoa, Fiji, Solomon Islands
Nonu /noni (Morinda Citrifolia)	Cook Islands, Samoa, Fiji, Niue, French Polynesia
Papaya (pawpaw)	Fiji
Bananas	Fiji, Papua New Guinea, Samoa
Coffee	Papua New Guinea, Samoa
Beef	Vanuatu

The main international markets for the listed products are Australia and New Zealand, representing the main destination for the export of organic products due to the proximity. Japan is a growing market, and other markets include North American and the European Union.

There is growing interest and activity in the area of fair trade programs and certification. Efforts are being made by the Pacific Organic and Ethical Trade Community (POETCom) to link organic producers into these systems as a way of adding further value to products and ensuring maximum benefits to the farmers.

In September 2011, Pacific exporters exhibited together for the first time under the banner of Pacific Organic and Ethical Trade Community (POETCom) at an international expo. As part of the events surrounding the Pacific Island Forum Leaders' Meeting in Auckland, New Zealand, a "Pacific Showcase" was held. At this event, products and produce from French

Polynesia, Papua New Guinea, Samoa, Solomon Islands and Vanuatu were exhibited and promoted. Public response was very positive.

Domestic markets

Generally, the domestic markets for organic certified products are not very developed and in some cases are non-existent. Organic products are commonly sold as conventional without a premium price. Some initiatives to promote awareness of the consumers about organic products on-going or are in the pipeline. Interesting opportunities are now being explored within the tourist structures of several countries that are facing a growth in the presence of tourists (e.g., Fiji, Cook Islands, and Samoa) focusing on developing Pacific cuisine and linking smallholder organic farmers directly with tourist and hospitality providers. There is continued growth and interest in organic products in New Caledonia and French Polynesia as evidenced by the Participatory Guarantee System (PGS) developments in both countries.

Legislation

Despite the policy brief on organic agriculture developed by the Secretariat of the Pacific Community (SPC) in 2009, the year 2011 saw no changes in legislation or policy development in the region. The policy brief aims to assist governments and others in the region develop relevant policy focuses on how organic agriculture can assist in meeting regional challenges. It outlines seven initial policy recommendations.

Increasingly organic agriculture is gaining mention and recognition in national policy and planning documents, but this has not evolved into formal policies. Once again, there are resource constraints in moving this agenda forward.

Government and international support

The Secretariat of the Pacific Community (SPC) as a regional intergovernmental organization continues to provide some basic support for coordination but as yet has not completed recruitment of a coordination officer for the Pacific Organic and Ethical Trade Community (POETCom). This human resource issue combined with limited international development support in 2011 has slowed the institutional development required to support implementing the Pacific Organic Standard (POS). The Food and Agriculture Organization undertook a study to support the development of an appropriate governance structure for POETCom and the organic guarantee system, but to date the report has not been released to POETCom for consideration and action.

National level activities such as supporting the formation of a coordinating committee in Vanuatu, development of group certification in countries where to date there has been no certification (Tonga and Kiribati) have been supported by OXFAM New Zealand and the Canada Fund. OXFAM New Zealand is also expanding its livelihoods program in the region and is now supporting 3 farmer support organizations in organizational capacity building and developing organic certification programs—Women in Business Development Samoa, Tonga National Youth Congress and Farm Support Association Vanuatu.

Outlook

While the implementation of the Pacific Organic Standard (POS) has been slow due to resource constraints, momentum of the movement remains strong across the region. The

outlook for the development of organics in the region is positive. Interest in organic products from the region appears to be growing. Key challenges around building production to meet projected demand remain. Establishment - the OGS and POETCom governance structure within the Secretariat of the Pacific Community (SPC) will facilitate implementation of the POS. This will ultimately improve access to organic certification for smallholder farmers in the region, and it will also provide a common standard for joint marketing and promotion.

Links/Further reading

- Secretariat of the Pacific Community www.spc.int
- Pacific Organic Standard http://www.spc.int/lrd/lrd/New_LRD_Publications.htm

Organic Agriculture in Oceania: Graphs

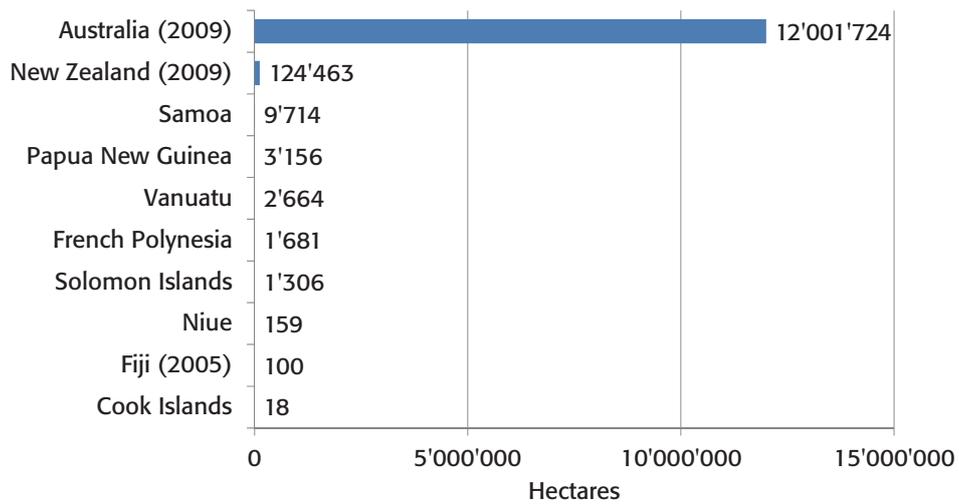


Figure 100: Oceania: Organic agricultural land by country 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

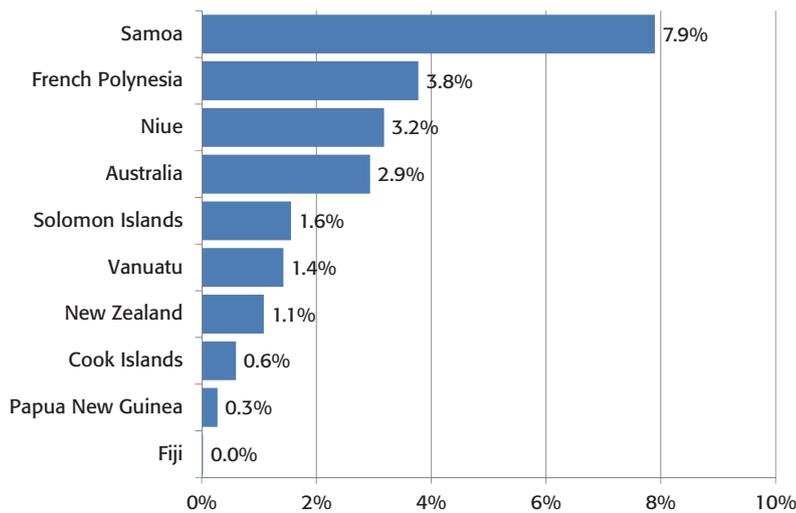


Figure 101: Oceania: Share of organic agricultural land 2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

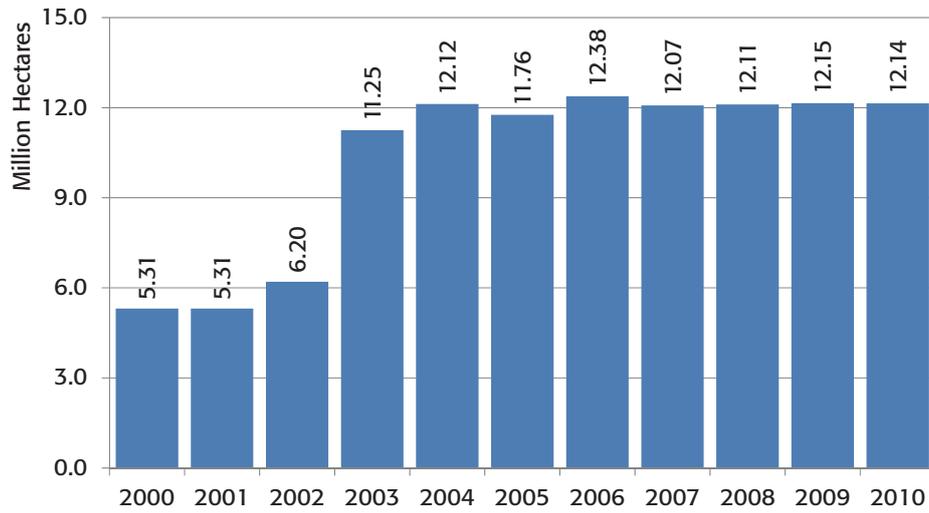


Figure 102: Oceania: Development of organic agriculture land 2000-2010

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Organic Agriculture in Oceania: Tables

Table 83: Oceania: Organic agricultural land, share of total agricultural land and number of producers 2010

Country	Area [ha]	Share of total agr. Land	Producers
Australia	12'001'724	2.93%	2'129
Cook Islands	18	0.60%	12
Fiji	100	0.02%	No data
French Polynesia	1'681	3.78%	17
New Zealand	124'463	1.08%	1'000
Niue	159	3.18%	61
Papua New Guinea	3'156	0.27%	4'559
Samoa	9'714	7.90%	353
Solomon Islands	1'306	1.55%	352
Vanuatu	2'664	1.42%	No data
Total	12'144'984	2.87%	8'483

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 84: Oceania: All organic areas 2010

Country	Agriculture [ha]	Wild collection [ha]	Total [ha]
Australia	12'001'724		12'001'724
Cook Islands	18		18
Fiji	100	50	150
French Polynesia	1'681	500	2'181
New Zealand	124'463		124'463
Niue	159		159
Papua New Guinea	3'156		3'156
Samoa	9'714		9'714
Solomon Islands	1'306		1'306
Vanuatu	2'664		2'664
Total	12'144'984	550	12'145'534

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Table 85: Oceania: Land use in organic agriculture 2010

Main use	Crop category	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	318'125
Arable crops	Arable crops, no details	32'500
	Arable crops, other	
	Cereals	3'905
	Flowers and ornamental plants	
	Green fodder from arable land	
	Hops	
	Industrial crops	
	Medicinal and aromatic plants	19
	Mushrooms	
	Mushrooms and truffles	
	Oilseeds	217
	Protein crops	18
	Root crops	
	Seeds and seedlings	
	Strawberries	15
	Sugarcane	
	Textile crops	
	Tobacco	
	Vegetables	1'388
Arable crops total		38'062
Cropland, no details	Cropland, no details	7'956
Other agricultural land	Fallow land, crop rotation	
	Home gardens	
	Other agricultural land	7'702
	Other agricultural land, no details	
	Other agricultural land, other	
	Unutilized land	
Other agricultural land, total		7'702
Permanent crops	Berries	15
	Citrus fruit	119
	Cocoa	507
	Coconut	1'406
	Coffee	669
	Flowers and ornamental plants, permanent	
	Fruit, no details	12
	Fruit, temperate	1'767
	Fruit, tropical and subtropical	585
	Fruit/nuts/berries	
	Grapes	822
	Medicinal and aromatic plants, permanent	
	Nurseries	
	Nuts	8'800
	Olives	470
	Other permanent crops	5'582
	Tea/mate, etc.	
Permanent crops total		20'754
Permanent grassland total		11'752'386
Total		12'144'984

Source: FiBL and IFOAM 2012; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 307.

Outlook: Organic Agriculture at the Earth Summit in Rio de Janeiro 2012

Recent Recognitions Support Organic Advocacy at the Earth Summit in Rio de Janeiro 2012

MARKUS ARBENZ¹

In 2011, two major publications from the United Nations Conference on Trade and Development (UNCTAD) and from the UN Special Rapporteur on Food supported the view that organic agriculture is a good farming system and development concept for achieving sustainability in agriculture. In June 2012 at the Rio+20 Conference, the organic movement will fight for broader recognition of its approaches.

Twenty years after the Rio Earth Summit, the planet is in a deeper environmental, energy and financial crisis than ever before. While humankind has made enormous progress in improving material welfare, this progress has come at the lasting cost of degradation our natural environment. Globalization, though it has opened worlds of opportunities for many, has also contributed to the exacerbation of global challenges. More than ever, the planet suffers the consequences of ill-conceived strategies. Poverty and hunger, climate change, genetic diversity loss, ecocide and land grabbing are a few phenomena to which the world has to find effective answers.

The most recent debate on agriculture and food security is characterized by a renaissance of productivity-oriented strategies. Some of them rely on techno-scientific, large-scale agribusiness options that profit considerably from economies of scale, but are neither ecologically and socially sustainable nor efficient in terms of land use. The proposed “second green revolution” has no answer for how to provide deprived people access to healthy food and neglects the priority of the poor to get access to resources, appropriate farming systems and personal skills.

Highly sustainable farming methods such as organic agriculture can help increase local food production, protect fertile soils against wind and water erosion and enhance the capacity to adapt to climatic changes such as drought or heavy precipitation events. In addition, high quality foods could provide access to valuable national and international markets and therefore play a crucial role in wider poverty reduction (UNCTAD-UNEP, 2008 a). The contribution of organic agriculture to poverty reduction is acknowledged by FAO (Diouf, 2009), and numerous case studies provide evidence of successful development projects having learnt from the application of organic agriculture principles and practices. More than ever, the world needs an organic alternative to help overcome the above-mentioned issues.

The paradigm shift entails a new strategy based on **ecosystem intensification** (or eco-intensification, which means intensifying the natural process of nutrient cycling, for example by stimulating soil biology through practices such as composting, crop rotation, mixed cropping or agro-forestry) for increasing the resilience of farms and smart use of biodiversity in order to meet the challenges of increases in productivity and poor people’s access.

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Major UN documents support organic farming

In 2008, the report of the **United Nation's International Assessment of Agricultural Knowledge, Science and Technology for Development** (IAASTD 2009), the most comprehensive study into the future needs of agriculture ever undertaken, shattered the paradigm that technological fixes were the solution to food security. It stressed the multi-functionality of agriculture and has led to the increased focus on small holders by policy makers. Many of its recommendations, including an essential shift towards ecosystem-based farming, have yet to be implemented.

UNCTAD, the United Nations Conference on Trade and Development published an official **policy brief, Sustainable Agriculture and food security** in LDCs for the 4th UN Conference on Least Developed Countries (LDCs) in 2011 (United Nations Conference on Trade and Development 2011). The policy brief underlines the importance of sustainable agriculture (used as a synonym to organic agriculture) in addressing hunger and poverty. It emphasizes the impressive productivity improvements that can be achieved with organic agriculture for instance in Africa. And it calls for a fundamental shift in national and donor policies particularly for the poorest countries facing challenges with hunger, with malnutrition and with scarce or degraded natural resources.

The **UN Special Rapporteur on Food** presented in March 2011 a report called **"Agro-ecology and the right to food"**¹ before the Sixteenth Session of the Human Rights Council of the United Nations General Assembly. Drawing on an extensive review of the scientific literature published in the last five years, the Special Rapporteur identifies agro-ecology as a mode of agricultural development that not only shows strong conceptual connections with the right to food, but has proven results for fast progress in the concretization of this human right for many vulnerable groups in various countries and environments. Moreover, agro-ecology delivers advantages that are complementary to better-known conventional approaches such as breeding high yielding varieties. The report argues that the scaling up of these experiences is the main challenge today. The report therefore calls for governments to make a fundamental shift towards agro-ecology as a way for countries to feed themselves without neglecting climate and poverty challenges.

Strengthened towards Rio

In Rio de Janeiro at the United Nations Conference on Sustainable Development (UNCSD, the Rio+20 Earth Summit), IFOAM and other actors from the organic movement (e.g. Biovision, Avalon) will be actively lobbying for the implementation of the findings of the IAASTD report, which was first initiated at the Rio+10 Conference in Johannesburg in 2002. IFOAM and other organic stakeholders have already successfully lobbied for agriculture to be on the agenda of the upcoming earth summit. They also made contributions to the so-called "zero document", setting the scene for the negotiations of the countries, which are being closely observed by civil society and the media. IFOAM presented the main demands of the organic movement, which are:

¹ Information on the Report: "Agroecology and the right to food" is available at <http://www.srfood.org/index.php/en/component/content/article/1174-report-agroecology-and-the-right-to-food>

The UNCSO 2012 (Rio+20) must include agreements that:

- (a) Recognize agro-ecological based farming or organic farming practiced by small-scale farmers as the most effective approach in addressing climate change, food and water security, biodiversity loss, poverty eradication and sustainable development.
- (b) State that the scaling up of organic agriculture through the reorientation of policies that support small-scale farmers is today's most urgent food and agricultural challenge, and that a transition to an ecologically based, resilient, fair and fully inclusive and humane agriculture is essential if the goals of sustainability and poverty eradication are to be simultaneously achieved.
- (c) Recognize the important role that governments and donors have to play in the transition to socially inclusive and ecologically based farming systems. Organic farming is knowledge-intensive rather than external input intensive, making it less attractive to private companies that develop and supply agricultural products. As a consequence, the transition will require public policies that support agricultural research and the wide dissemination of outcomes and outputs, including through the development of participative extension services.
- (d) Establish a working program under the auspices of FAO that implements the findings of both the 2008 IAASTD report and the 2011 UN Special Rapporteur's report on the Right to Food.
- (e) Establish an 'International Multi-Stakeholder Panel on Agriculture and Food Systems', based on the IAASTD process and its objectives, that informs the transition to a green, fair, ecologically sound and humane agriculture. The panel would provide regular updates on agricultural knowledge, science and technology options that address food and water security within the context of sustainable development, complimenting the role of the Committee on World Food Security FAO.
- (f) Guarantee farmers the right to participate in all decision-making processes related to agricultural production, distribution, pricing, marketing, standard-setting and policy-making, as well as the regulation of the agricultural commodities market. They must also be empowered to exercise these rights.
- (g) Ensure the removal of policies adverse to the well-being of agriculturally based communities, especially in Least Developed Countries (LDCs). These include, for example, perverse subsidies or restrictions on the use of plant varieties through patents on seeds that undermine the livelihood.
- (h) Empower small-scale food producers, pastoralists, indigenous peoples, peasants and the rural poor to increase their influence on policy development and implementation. Groups particularly vulnerable to local food security threats and violations of tenurial rights (for example through land-grabbing) should be provided with enhanced access to information as a basis for decision-making; access to justice; and the right of free, prior and informed consent on decisions especially affecting them.

IFOAM and its allies will continue to observe the negotiations before, during and after the Rio Conference. Its outcome will have an immense and commonly underestimated impact on the opportunities for organic farming and its value chain of products.

References

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- International Assessment of Agricultural Knowledge, Science and Technology for Development (IAASTD) (2009): Global report. Edited by Beverly D. McIntyre et al. Island Press, Washington. Available at http://www.agassessment.org/index.cfm?Page=doc_library&ItemID=14
- UNCTAD-UNEP - Capacity-building Task Force on Trade, Environment and Development (2008) Organic Agriculture and Food Security in Africa. United Nations New York and Geneva, 2008
http://www.unctad.org/en/docs/ditcted200715_en.pdf (UNCTAD/DITC/TED/2007/15).
- United Nations Conference on Trade and Development (UNCTAD) (2011): Sustainable Agriculture and food security in LDCs. Policy Brief. Available at http://www.unctad.org/en/docs/presspb20116_en.pdf

Annex

The FiBL-IFOAM Survey: Overview Table and Information on Data Sources

Table 86: Organic agricultural land, share of total agricultural land and number of producers and domestic sales 2010

If not otherwise stated, the data year is 2010.
For detailed data sources see annex.

Country	Area [ha]	Share of total agr. land	Producers	Sales [Mio €]
Afghanistan	61	0.00%	264 (2008)	No data
Albania	284	0.02%	110	No data
Algeria	623	0.00%	81	No data
Andorra	2	0.01%	1	No data
Angola	No data	0.00%	No data	No data
Argentina	4'177'653	2.97%	1'856	No data
Armenia	750	0.04%	34	No data
Australia	12'001'724 (2009)	2.93%	2'129 (2009)	536 (2009)
Austria	543'605	19.69%	22'132	986
Azerbaijan	21'347	0.45%	288	3
Bangla Desh	799	0.01%	2	No data
Belarus	No data	0.00%	No data	No data
Belgium	49'005	3.57%	1'108	421
Belize	1'177 (2009)	0.77%	2'017 (2009)	No data
Benin	1'167	0.04%	1'992	No data
Bhutan	No data	0.00%	No data	No data
Bolivia	112'109	0.30%	11'646	No data
Bosnia and Herzegovina	580 (2009)	0.03%	27 (2009)	1
Brazil	1'765'793 (2007)	0.68%	7'250 (2007)	No data
Bulgaria	25'648	0.84%	709	7
Burkina Faso	13'802	0.12%	14'026	No data
Burundi	350	0.02%	35	No data
Cambodia	8'084	0.15%	7'498	No data
Cameroon	496	0.01%	763	No data
Canada	703'678 (2009)	1.04%	3'929	1'904
Chad	No data	0.00%	No data	No data
Channel Islands	370 (2009)	4.20%	No data	No data
Chile	31'696	0.20%	529 (2009)	2 (2009)
China	1'390'000	0.27%	No data	791 (2009)
Colombia	33'334	0.08%	4'775	No data
Comoros	1'045	0.67%	958	No data
Cook Islands	18	0.60%	12 (2009)	No data
Costa Rica	11'114	0.62%	3'000 (2009)	1 (2008)
Côte d'Ivoire	18'133	0.09%	735	No data
Croatia	23'352	1.80%	1'125	69
Cuba	14'314 (2008)	0.22%	2'467 (2008)	No data
Cyprus	3'575 (2009)	2.45%	732 (2009)	2 (2006)
Czech Republic	448'202	10.55%	3'517	68 (2009)
Democratic Republic of the Congo	32'523	0.14%	1'122	No data
Denmark	162'903	6.12%	2'677	791
Dominican Republic	165'109	8.49%	23'376	No data
Ecuador	64'751	0.86%	13'114	No data
Egypt	82'167	2.23%	790 (2009)	No data
El Salvador	6'736 (2008)	0.44%	2'000 (2007)	No data
Estonia	112'972	12.46%	1'356	12 (2009)

ANNEX: TABLE: ORGANIC AGRICULTURAL LAND, PRODUCERS, DOMESTIC SALES

Country	Area [ha]	Share of total agr. land	Producers	Sales [Mio €]
Ethiopia	137'196	0.39%	123'062	No data
Falkland Islands (Malvinas)	398'806	35.94%	8	No data
Faroe Islands	253	8.43%	1	No data
Fiji	100 (2005)	0.02%	No data	No data
Finland	169'168	7.38%	4'022	80
France	845'442	3.08%	20'604	3'385
French Guiana (France)	1'776	7.82%	27	No data
French Polynesia	1'681	3.78%	17	No data
Gambia	No data	0.00%	No data	No data
Georgia	1'401	0.06%	64	No data
Germany	990'702	5.93%	21'942	6'020
Ghana	12'635	0.08%	2'327	No data
Greece	309'823	3.74%	21'274	58 (2006)
Grenada	85	0.68%	3	No data
Guadeloupe (France)	27	0.07%	26	No data
Guatemala	13'375	0.30%	3'008	No data
Guinea-Bissau	No data	0.00%	No data	No data
Guyana	4'249 (2009)	0.25%	74 (2009)	No data
Haiti	188	0.01%	42	No data
Honduras	17'825	0.56%	1'113 (2009)	No data
Hungary	127'605	3.02%	1'617 (2009)	25
Iceland	5'806	0.25%	38	No data
India	780'000	0.43%	400'551	93 (2008)
Indonesia	71'208	0.13%	9'805	No data
Iran (Islamic Republic of)	7'256	0.01%	3'014	No data
Ireland	47'864 (2009)	1.16%	1'366	103
Israel	8'794	1.68%	401	No data
Italy	1'113'742	8.74%	41'807	1'550
Jamaica	542 (2009)	0.12%	80 (2009)	No data
Japan	9'067 (2009)	0.23%	2'137 (2009)	1'000 (2009)
Jordan	1'469	0.14%	42	No data
Kazakhstan	133'562 (2009)	0.06%	8 (2009)	No data
Kenya	4'842	0.02%	12'647	0
Kyrgyzstan	15'040	0.14%	987	No data
Lao People's Democratic Republic	4'885 (2009)	0.21%	2'178 (2009)	1
Latvia	166'320	9.38%	3'593	No data
Lebanon	1'227	0.18%	172	No data
Lesotho	No data	0.00%	1	No data
Liechtenstein	1'020	27.27%	31	3 (2009)
Lithuania	143'644	5.42%	2'652 (2009)	No data
Luxembourg	3'720	2.84%	96	65
Madagascar	20'288	0.05%	6'875	No data
Malawi	824	0.01%	9'004	No data
Malaysia	1'582 (2009)	0.02%	24 (2009)	No data
Mali	15'199	0.04%	27'711	No data
Malta	24	0.23%	11	No data
Martinique (France)	193	0.69%	27	No data
Mauritius	35	0.04%	2	No data
Mexico	332'485 (2008)	1.55%	128'862 (2008)	21 (2008)
Moldova	32'105 (2009)	1.30%	166 (2009)	No data
Montenegro	3'561	0.69%	62	0

ANNEX: TABLE: ORGANIC AGRICULTURAL LAND, PRODUCERS, DOMESTIC SALES

Country	Area [ha]	Share of total agr. land	Producers	Sales [Mio €]
Morocco	17'030	0.06%	120	No data
Mozambique	5'519	0.01%	6	No data
Myanmar	60	0.00%	6	No data
Namibia	124 (2009)	0.00%	792 (2009)	No data
Nepal	9'789	0.23%	1'470 (2009)	No data
Netherlands	46'233	2.40%	1'462	657
New Zealand	124'463 (2009)	1.08%	1'000 (2008)	143 (2009)
Nicaragua	33'621 (2009)	0.65%	10'060 (2009)	No data
Niger	48	0.00%	1	No data
Nigeria	11'979	0.02%	517 (2008)	No data
Niue	159 (2006)	3.18%	61 (2006)	No data
Norway	57'219	5.53%	2'805	113
Occupied Palestinian Territory	6'354	1.73%	832	No data
Oman	39	0.00%	4	No data
Pakistan	22'103	0.08%	1'045 (2009)	No data
Panama	3'242	0.15%	9	No data
Papua New Guinea	3'156 (2006/2010)	0.27%	4'559 (2006)	No data
Paraguay	51'190 (2007)	0.24%	11'401 (2007)	No data
Peru	216'756	1.01%	44'827	14
Philippines	79'992	0.67%	3'006	No data
Poland	521'970	3.37%	20'578	59
Portugal	201'054	5.79%	2'434	22
Republic of Korea	15'518	0.84%	10'790	226
Réunion (France)	276	0.69%	61	No data
Romania	182'706	1.33%	2'986	45
Russian Federation	44'017	0.02%	50	65 (2009)
Rwanda	3'600	0.18%	535	No data
Samoa	9'714	7.90%	353	0
Sao Tome and Principe	4'411	7.88%	2'009	No data
Saudi Arabia	42'376	0.02%	62	No data
Senegal	28'175	0.30%	22'755 (2009/2010)	No data
Serbia	8'635	0.17%	3'887	40
Sierra Leone	65'252	1.91%	22'512	No data
Slovakia	174'471	9.01%	363 (2009)	4
Slovenia	30'696	6.28%	2'218 (2006)	38
Solomon Islands	1'306	1.55%	352	No data
Somalia	No data	0.00%	No data	No data
South Africa	55'621	0.06%	242	No data
Spain	1'456'672	5.85%	27'877	905 (2009)
Sri Lanka	43'664	1.67%	398	No data
Sudan	53'602	0.04%	1'003	No data
Suriname	11	0.01%	1	No data
Swaziland	6	0.00%	1	No data
Sweden	438'693	14.07%	5'208	804
Switzerland	119'613	11.37%	5'989	1'180
Syrian Arab Republic	19'987	0.14%	2'458	No data
Taiwan	2'962 (2009)	0.35%	1'277 (2009)	No data
Tajikistan	391	0.01%	75	No data
Thailand	34'079	0.17%	7'405	51 (2009)
The former Yugoslav	35'164	3.28%	542	No data

ANNEX: TABLE: ORGANIC AGRICULTURAL LAND, PRODUCERS, DOMESTIC SALES

Country	Area [ha]	Share of total agr. land	Producers	Sales [Mio €]
Republic of Macedonia				
Timor-Leste	24'750	6.60%	72 (2009)	No data
Togo	3'409	0.10%	3'618	No data
Trinidad and Tobago	No data	0.00%	No data	No data
Tunisia	175'066	1.79%	2'487	No data
Turkey	383'782	1.58%	43'096	4 (2009)
Uganda	228'419	1.64%	188'625	No data
Ukraine	270'226	0.65%	142	2
United Arab Emirates	360	0.06%	2	No data
United Kingdom	699'638	4.34%	4'949	2'000
United Republic of Tanzania	72'665	0.20%	85'366	No data
United States of America	1'948'946 (2008)	0.60%	12'941 (2008)	20'155
Uruguay	930'965 (2006)	6.29%	630 (2006)	No data
Uzbekistan	65	0.00%	6	No data
Vanuatu	2'664	1.42%	No data	No data
Venezuela (Bolivarian Republic of)	337	0.02%	4	No data
Viet Nam	19'272	0.19%	4'385	0
Zambia	7'310 (2009)	0.03%	10'055 (2009)	No data
Zimbabwe	1'995	0.01%	3	No data
Total*	37'041'004	0.85%	1'578'407	44'522

Source: FiBL-IFOAM-Survey 2012, based on data from governments, the private sector, and certifiers. Market data survey in cooperation with AMI. For detailed data sources see annex

Data Providers and Data Sources

COMPILED BY JULIA LERNOUD AND
HELGA WILLER

Afghanistan

Source

Certifier data. The number of producers is from 2008.

Albania

Source

Survey among certifications bodies carried out by Albinspekt, Tirana, Albania, www.albinspekt.com

Contact

Sokol Stafa, Albinspekt, Tirana, Albania.
www.albinspekt.com

Algeria

Source

Mediterranean Organic Agriculture Network
MOAN c/o C.I.H.E.A.M, Bari; Italy.

Contact

Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto
Agronomico Mediterraneo di Bari, Italy,
www.iamb.it

Note

No separate figure for the number of producers was available, the figure communicated here is that for all operators in the country.

Andorra

Source

Ecocert, BO 47, 32600 L'Isle Jourdain, France,
www.ecocert.com

Contact

Vincent Morel, Area Manager - Africa, Ecocert,
L'Isle Jourdain, France, www.ecocert.com

Angola

For Angola no data were available for 2010.

Argentina

Source

Land user/operator/production data: SENASA,
2011 "Situación de la Producción Orgánica en la
Argentina durante el año 2010". Buenos Aires. In
addition, further data were provided by SENASA,
www.senasa.gov.ar

Contact

Juan Carlos Ramirez and Diego Pinasco, SENASA,
Buenos Aires, Argentina, www.senasa.gov.ar

Armenia

Source

Survey of Ecoglobe - Organic control and
certification body, 375033 Yerevan, Republic of
Armenia, www.ecoglobe.am.

Contact

Nune Darbinyan, Ecoglobe - Organic control and
certification body, 375033 Yerevan, Republic of
Armenia, www.ecoglobe.am.

Australia

Source

Land area, number of producers are based on
figures from Australian Quarantine Inspection
Service (AQIS), Canberra ACT 2601, Australia
www.daffa.gov.au/aqis. as communicated in
Mitchell et al., see below.

All other data were taken from: Mitchell, A.,
Kristiansen, P., Bez, N. and Monk, A. (2010),
Australian Organic Market Report 2010. Biological
Farmers of Australia, Chermside.

Note

Please note that the crop data from the above
mentioned study are based on a survey among
producers in Australia. The data may therefore not
be complete.

Contact

- › Alexandra Mitchell, School of Rural Science
and Agriculture, University of New England,
Armidale, NSW Australia
- › Els Wynen, Ecolanduse Systems, Canberra
ACT 2615, Australia, www.elspl.com.au

Austria

Sources

- › Data source for land area, land use and farms:
Lebensministerium: Gruener Bericht 2011.
Lebensministerium, Wien,
www.gruenerbericht.at
- › Market data and trade data: ORA and Bio
Austria,

Note

Since early 2010 Austria includes the alpine
pastures in its organic statistics (also in retrospect).
This explains why the 2009 and 2010 figure for the
land under organic management is considerably
higher than communicated previously.

Contact

- › Otto Hofer, Lebensministerium / Federal
Ministry of Agriculture, Forestry,
Environment and Water Management (AT),
Vienna, Austria, www.lebensministerium.at

- › Ralph Liebing, ORA ~ Organic Retailers Association, Vienna, Austria, www.o-r-a.org
- › Elisabeth Klingbacher, FiBL Austria, FiBL - Forschungsinstitut für biologischen Landbau, Seidengasse 33-35/13, A-1070 Wien, www.fibl.org

Azerbaijan

Source

GABA Ganja Agribusiness Association, Ganja, Azerbaijan, www.gaba.az

Contact

Data supplied by Dr. Vugar Babayev; GABA Ganja Agribusiness Association, Ganja, Azerbaijan; www.gaba.az

Bangladesh

Source

Certifier data.

Belarus

Source

Certifier data (wild collection only).

Belgium

Source

- › Land area: Eurostat (2011): Certified organic crop area (2010). Last update December 5, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Operators: Eurostat (2011): Eurostat (2011): Certified organic operators (2010). Last update December 2, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Market data: Bioforum Wallonie (2011) Report 2011. Namur, Belgium

Contact

Paul Verbeke, BioForum Vlaanderen vzw, Antwerpen, www.bioforum.be

Belize

Source

The data are from 2009 from a survey among the certified companies in Belize by the Belize Organic Producers Organisation BOPA, Belmopan, Belize. In addition to the BOPA survey the number of producers as communicated by one international certifier were added.

Contact

Maximiliano Ortega, Belize Organic Producers Organisation BOPA, Belmopan, Belize

Benin

The data were compiled by Laurent C. Glin: Researcher, FiBL West Africa and Wageningen University, The Netherlands
See also country report about Benin from Laurent Glin in this volume, page 152.

Bhutan

Source

Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt.

Contact

Kesang Tshomo, Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt.

Bolivia

Source

GIZ survey based on the data from Bolicert, BioLatina, IMO-Control, Camara de Exportadores de La Paz and Bolivian Association of Organic Producers Organisations – AOPEB

Contact

Verena Batlogg, GIZ Bolivia, La Paz, Bolivia. www.giz.de

Bosnia Herzegovina

Source

- › Area and operators (2009): ECON, Sarajevo, Bosnia i Hercegovina, www.econ.co.ba, based on the data of the certifiers.
- › Market data (2010): Ecozept - Dr. Burkhard Schaer, schaer@ecozept.com, www.ecozept.com

Note

The source for the area and operators data is not the same as for the data published before 2009. A direct year-to-year comparison is therefore not possible.

Brazil

Sources

- › Land area and producers: The data are from 2007, they were provided by: Ming Chao Liu, Organics Brazil, Curitiba Parana, 80210-350 Brazil, www.organicsbrasil.org. The data are based on information of the private certification agencies that are accredited according to international standards. The coverage of the data is about 95 percent. Please note: The data reported previously by FiBL, SOEL and IFOAM prior to 2007 only included the fully converted areas. The figure

presented in this book includes the in-conversion area.

- › Land use and crop data: The land use and crop data are an estimate by FiBL, applying the shares of the individual crops as provided by Instituto de Promoção do Desenvolvimento (IPD) (2010): Perfil do mercado orgânico brasileiro como processo de inclusão social. Curitiba Paraná, Brasil. http://ipd.org.br/upload/tiny_mce/arquivos/Perfil_do_mercado_organico_brasileiro_com_o_processo_de_inclusao_social.pdf to the data as provided by Organics Brasil (only for the fully converted area).
- › Domestic market data: Ministry of Agrarian Development, quoted in Brazil magazine, Jan 8, 2008.
- › Export data: Instituto de Promoção do Desenvolvimento (IPD) (2010): Perfil do mercado orgânico brasileiro como processo de inclusão social. Curitiba Paraná, Brasil. http://ipd.org.br/upload/tiny_mce/arquivos/Perfil_do_mercado_organico_brasileiro_com_o_processo_de_inclusao_social.pdf

Contact

Ming Chao Liu, Organics Brazil, Curitiba Parana, 80210-350 Brazil.

Bulgaria

Sources

- › Land area: Eurostat (2011): Organic crop area (2010). Last update August 23, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update August 29, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Domestic market data: Bioselena, Karlovo, Bulgaria. www.bioselena.com

Contact

Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Note

See also article about organic farming in Bulgaria in this volume (page 216).

Burkina Faso

Sources

The data were compiled by FiBL based on the data of the following international certifiers.

- › Ecocert West Africa, Ougadougou, Burkina Faso
- › CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
- › LACON GmbH, Brünnesweg 19, 77654 Offenburg, Germany, www.lacon-institut.com

Contact

- › Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso
- › Emmeline Foubert, CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
- › Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Burundi

Source

Ecocert East Africa, Madagascar

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar., www.ecocert.com.

Cambodia

Source

Cambodian Organic Agriculture Association (COAA), Khan Chamkar Morn, Phnom Penh, Cambodia, www.cora.org. Survey among the organic certifiers in the country

Contact

- › Winfried Scheewe, Cambodian Center for Study and Development in Agriculture (CEDAC), Toul Kok Phnom Penh, Cambodia, <http://www.cedac.org.kh>

Cameroon

Source

The data were compiled by IFOAM and FiBL based on the data of the following two international certifiers :

- › Ecocert, BP 47, 32600 L'Isle Jourdain, France, www.ecocert.com.
- › Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification

Contact

- › Vincent Morel, Area Manager - Africa, Ecocert, BP 47, 32600 L'Isle Jourdain, France, www.ecocert.com.
- › Vivien Hodgson and Andrew Bayliss, Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification

Note

A direct year-to-year comparison with the data prior to 2009 is not possible as since 2009 data from more certifiers were available than previously.

Canada

Source

- › Land area (2009): Survey of the Canadian Organic Growers (COG), Ottawa, Ontario K1N 7Z2, Canada, www.cog.ca; based on information of the certifiers.
- › Producers and other operator types (2010): Survey of the Canadian Organic Growers

(COG), Ottawa, Ontario K1N 7Z2, Canada, www.cog.ca; based on information of the certifiers.

- › Market data (2010): Holmes and Macey (2012): Canada: Country Report. In: The World of Organic Agriculture 2012. FiBL, Frick and IFOAM, Bonn

Contact

- › Matthew Holmes, Executive Director, Canada Organic Trade Association (COTA), Sackville, Canada, <http://ota.com/otacanada.html>
- › Anne Macey, Canadian Organic Growers (COG), Ottawa, Ontario K1N 7Z2, Canada, www.cog.ca.

Note

See also article about organic farming in Canada in this volume, page 277).

Chad

Source

Source: Ecocert West Africa, Ougadougou, Burkina Faso

Contact

Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso

Chile

Source

- › Certified areas and the number of producers/smallholders: Servicio Agrícola y Ganadero (SAG), Av. Presidente Bulnes 140, Santiago, Chile, www.sag.gob.cl.
- › Organic export value: Oficina de Estudios y Políticas Agrarias (see address above).
- › Domestic market data according to USDA: Organic Products Report Chile. GAIN Report Number CI0031. November 30, 2010

Contact

Pilar M. Eguiñor Recabarren, Oficina de Estudios y Políticas Agrarias (ODEPA), Ministerio de Agricultura, Teatinos 40, Santiago, Chile, www.odepa.gob.cl.

Channel Islands

Source

FAOSTAT (2011): Resourcestat. Land. Last update: July 21, 2011. <http://faostat.fao.org/site/377/DesktopDefault.aspx?PageID=377#ancor>
The figures are from 2009.

China

Sources

- › Land area. Certification and Accreditation Administration of the People's Republic of China (CNCA), 100088, Haidian district,

Beijing, China, www.cnca.gov.cn. To the official data of CNCA (1.09 million hectares of agricultural land), 300'000 hectares certified by international certifiers were added (estimate).

- › Crop data: As no new land use and crop data were available the data from previous surveys were used.
- › Market data: Panyakul, Vitoon R. and Zejiang Zhou: Overview of the market for organic food products in China PRC. International Trade Centre ITC. Geneva. Available at <http://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/Organic-food-products-in-China-market-overview.pdf>

Contact

- › Zejiang Zhou, IFOAM Representative in Asia, International Federation of Organic Agriculture Movements (IFOAM), Bonn, Germany, http://www.ifoam.org/about_ifoam/around_world/china.html
- › Dr. Wang Maohua, Certification and Accreditation Administration of the People's Republic of China (CNCA), 100088, Haidian district, Beijing, China, www.cnca.gov.cn

Colombia

Source

- › ECONEXOS, Conexión Ecológica, Calle 5 No. 45A-125, Cali, Colombia, info@econexos.org, www.econexos.com
- › Minagricultura - Ministro de Agricultura y Desarrollo Rural, Avenida Jiménez No. 7-65, Bogotá DC, República de Colombia, www.minagricultura.gov.co.

Contact

- › Carlos Escobar, ECONEXOS - Desarrollo en Movimiento, Cali República de Colombia, www.econexos.com.
- › Luis Eugenio Cinfuentes, Coordinator of the National Program for Organic Agriculture, Ministry of Agriculture and Rural Development, Bogota, Colombia, www.minagricultura.gov.co

Comoros

Source

Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com;

Contact

Vincent Morel, Area Manager - Africa, Ecocert, L'Isle Jourdain, France

Congo, Democratic Republic of

Source

Certifier data.

Cook Islands**Source**

Land area and use: Titikaveka Growers Association, Cook Islands

Operators: Titikaveka Growers Association, Cook Islands.

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

Costa Rica**Source**

- › Land area, operators and export data: Servicio Fitosanitario del Estado (2011): Programas Especiales/ Agricultura Orgánica. Estadísticas 2010. M.A.G Costa Rica, San José
- › Operator data: Source: Ministerio Agricultura y Ganadería, Servicio Fitosanitario del Estado, Acreditación y Registro en Agricultura Orgánica. Data supplied by Roberto Azofeifa, Departamento de Producción Sostenible; Dirección Nacional de Extensión Agropecuaria
- › Domestic Market data (2009): Costa Rican Organic Agriculture Movement MAOCO, quoted in Azofeifa, Roberto (2011): Organic Agriculture in Costa Rica. In: FiBL/IFOAM (2011); The World of Organic Agriculture 2012. IFOAM, Bonn and FiBL. Frick
- › Export data (2009): PROMOCER (2010): Costa Rica: exportaciones de productos orgánicos según destino

Contact

Roberto Azofeifa, Ministerio de Agricultura y Ganadería, 10094-1000 San José, Costa Rica

Côte d'Ivoire

The data were compiled by FiBL based on the data of the following international certifiers.

Sources

- › BCS Öko-Garantie GmbH, 90402 Nuremberg, Germany, www.bcs-oeko.com.
- › Control Union, Zwolle, The Netherlands, www.controlunion.org
- › Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com.
- › Institute for Marketecology (IMO), 8570 Weinfelden, Switzerland, www.imo.ch;

Contact

- › Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org
- › Tobias Fischer, BCS Öko-Garantie GmbH, 90402 Nuremberg, Germany, www.bcs-oeko.com
- › Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

- › Peter Horner, Institute for Marketecology (IMO), 8570 Weinfelden, Switzerland, www.imo.ch

Croatia**Sources**

- › The data were provided by Ministry of Agriculture, Fisheries and Rural Development, Ulica grada Vukovara 78, 10 000 Zagreb, Croatia, www.mps.hr. To the land use data provided by the Ministry of Agriculture, data on areas certified by international certifiers, provided by Darko Znaor (see below), were added (70 hectares).
- › Market& trade data (2010): Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Contacts

- › Željko Herner, Ministry of Agriculture, Fisheries and Rural Development, Ulica grada Vukovara 78, 10 000 Zagreb, Croatia, www.mps.hr
- › Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Cuba

The data are from 2008.

Sources

- › For all data apart from sugar: Ministry of Agriculture, Ciudad de La Habana 10600, Cuba, www.cubagob.cu/mapa.htm.
- › Data source for the cultivation and production of sugar: Ministry of Sugar, Calle 23, # 171, e/N y O, Vedado, Ciudad de La Habana, Cuba, www.cubagob.cu/mapa.htm.

Note

A differentiation between full organic status and in conversion was not available. All data refer to 2008.

Contact

Lukas Kilcher, Research Institute of Organic Agriculture (FiBL), 5070 Frick, Switzerland, www.fibl.org.

Cyprus**Source**

- › Land area and producer data (from 2009): Ministry of Agriculture, Natural Resources and Environment, Louki Akrita, Avenue 1412 Nicosia, Republic of Cyprus, www.moa.gov.cy
- › Market data (from 2006): Ecozept

Contact

Andreas Selearis, Ministry of Agriculture, Natural Resources and Environment, Louki Akrita, Avenue 1412 Nicosia, Republic of Cyprus, www.moa.gov.cy

Czech Republic

Sources

- › Total organic agricultural land: Urban, Jiri and Martin Leibl (2011): Organic Farming in the Czech Republic 2011. Ministry of Agriculture and Czech Technology Platform of Organic Farming. Czech Republic, Prague
- › Land use details: Eurostat (2011): Organic crop area. Czech Republic (2010). Last Update: August 23, 2011. The Eurostat homepage, Eurostat, Luxembourg <http://epp.eurostat.ec.europa.eu/portal/page/portal/agriculture/data/database>
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update August 29, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Market data (from 2009): ÚZEI, Prague, Czech Republic
- › Export data (from 2008): Green Marketing, Moravské Knínice, Czech Republic

Note

The figure on the organic land area communicated by Eurostat differs from that communicated by the Ministry of Agriculture of the Czech Republic.

Contact

- › Karolina Dyrtova, Bioinstitut, Olomouc 77147, Czech Republic
- › Andrea Hrabalová, ÚZEI, Prague, Czech Republic
- › Tom Vaclavik, Green Marketing, Moravské Knínice, Czech Republic

Denmark

Sources

- › Land area, land use: Eurostat (2011): Organic crop area (2010). The Eurostat homepage. Last update: September 23, 2011
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update October 6, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Domestic sales: Source: Landbrug & Fødevarer. Based on data from statistics Denmark and Organic Denmark.
- › Exports, imports, retail sales: Statistics Denmark
- › Other marketing channels: Organic Denmark. Data compiled by Ejvind Pedersen, Danish Agriculture & Food Council, Agro Food Park 15, 8200 Aarhus, Denmark

Contact

- › Ejvind Pedersen, Danish Agriculture & Food Council, Agro Food Park 13, 8200 Aarhus N, Denmark

Dominican Republic

Source

Secretaria de Estado de Agricultura, Oficina de Control Orgánico, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Contact

Josè A. Zapata G., Secretaria de Estado de Agricultura, Oficina de Control Orgánico, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Ecuador

Source

Land area, operators:, German Technical Cooperation (GIZ), Eloy Alfaro y Amazonas, Edificio MAGAP, Piso 4., Quito, Ecuador, www.giz.de

Export data: La Agencia Ecuatoriana de Aseguramiento de Calidad del Agro – Agrocalidad, Av. Amazonas y Eloy Alfaro, Edif. MAGAP, piso 9, Ecuador, www.agrocalidad.gov.ec.

Contact

Sonia Lehmann, German Technical Cooperation (GIZ), Eloy Alfaro y Amazonas, Edificio MAGAP, Piso 4., Quito, Ecuador, www.giz.de

Egypt

Source

Mediterranean Organic Agriculture Network MOAN, c/o IAMB Bari

Contact

Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Note

For Egypt only a figure for the total operators is available for 2009, this figure is listed under producers.

El Salvador

Data are from 2009

Source

Ministerio de Agricultura y Ganadería, Final 1a. Avenida Norte, 13 Calle Poniente y Avenida Manuel, Gallardo, Santa Tecla, El Salvador

Contact

Manuel Ernesto Sosa Urrutia, Ministerio de Agricultura y Ganadería, Santa Tecla, El Salvador

Estonia

Sources

- › Total organic agricultural land: Põllumajandusamet - Agricultural Board, Saku, Estonia,

<http://www.pma.agri.ee/index.php?id=104&sub=128&sub2=296&sub3=297>

- › Land area and land use: Eurostat (2011): Organic crop area (2010). Last Update: August 23, 2011. The Eurostat Homepage, Eurostat, Luxembourg
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update August 29, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Market data (2009): Estonian Organic Farming Foundation, Tartu, Estonia

Contact

Merit Mikk, Estonian Organic Farming Foundation, Tartu, Estonia

Note

The figure on the total organic agricultural land area provided by Eurostat differs from the total provided by the Estonian government.

Ethiopia**Source**

›Ethiopian Association of Organic Agriculture and Tepi National Spice Research Centre

Contact

Addisu Alemayeh, Ethiopian Association of Organic Agriculture and Tepi National Spice Research Centre, Addis Ababa, Ethiopia

Falkland Islands**Source**

Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk.

Contact

Lucy Ellis, Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk

Faroe Islands**Source**

Vottunarstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

Gunnar Gunnarsson, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is.

Fiji Islands

The data published in this volume had been received for the SOEL/FiBL survey in 2007, and no update has been available since.

Finland**Sources**

- › Land area and land use: Eurostat (2011): Organic crop area (2010). Last Update: August 18, 2011. The Eurostat Homepage

- › Data on wild collection provided by the Finnish Food Safety Authority Evira
- › Operator data: Eurostat (2011): Number of registered organic operators (2010). Last update October 28, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Market data: BioMarkt-info, Germany. Online article of October 10, 2011: Finland's organic market. www.organaic-market.info

France**Source**

› Land area and land use: Eurostat (2011): Organic crop area (2010). Last Update: August 18, 2011. The Eurostat homepage, Eurostat, Luxembourg

› Operators: Eurostat (2011): Number of registered organic operators (2010). Last update August 29, 2011. The Eurostat homepage, Eurostat, Luxembourg

› Market and international trade: Agence BIO (2011), The Agence Bio homepage 93100 Montreuil sous Bois, France,. Available at http://www.agence-bio.fr/actualites.asp?FK_categorie=1&pk_actuelite=129&m1=3

Contact

Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

French Guyana**Source**

All data: Agence BIO (2010): The Agence Bio homepage 93100 Montreuil sous Bois, France,. Available at http://www.agencebio.org/upload/pagesEdito/fichiers/CC_Ed2011_Chap8.pdf

Contact

Olivier Devillers, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

French Polynesia**Source**

Land use and operators data provided by Karen Mapusua and local and international certification bodies.

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

Gambia

Data for Gambia have not been supplied since 2007 by any of the certification bodies. IFOAM and FiBL therefore concluded that there is currently no certified organic production in the country. Any

information on certified organic farming in Gambia should be sent to the IFOAM Africa coordinator, Hervé Bouagnimbeck, IFOAM, Bonn Germany, e-mail h.bouagnimbeck@ifoam.org.

Georgia

Source

Elkana Survey, Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge

Contact

Elene Shatberashvili, Biological Farming Association Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge

Germany

Sources

- › Total organic land area and operators: Ministry of Food, Agriculture and Consumer Protection BMELV, Bonn, Germany, Available at http://www.bmelv.de/cln_173/SharedDocs/Downloads/Landwirtschaft/OekologischerLandbau/Strukturdaten-2009.pdf?__blob=publicationFile
- › Land use and production details: Agrarmarkt Informationsgesellschaft AMI, Bonn, Germany, www.ami-informiert.de/
- › Market data: Agrarmarkt Informationsgesellschaft AMI, Bonn, Germany, www.ami-informiert.de/

Contact

Diana Schaack, AMI, Bonn, Germany, www.ami-informiert.de/

Ghana

Source

The data were compiled by FiBL and IFOAM based on the data of the following international certifiers.

- › CERTISYS, Brussels, www.certisys.eu
- › Control Union, Zwolle, The Netherlands www.controlunion.org
- › Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso
- › IMO, Weinfelden, Switzerland, www.imo.ch
- › Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification

Contact

- › Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands
- › Vivien Hodgson and Andrew Bayliss, Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification
- › Emmeline Foubert, CERTISYS, Brussels, Belgium
- › Peter Horner, IMO, Weinfelden, Switzerland
- › Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Note

A direct year-to-year comparison over the past ten years is not possible, because data from more certifiers were available than previously. From 2009 to 2010, the sources have remained the same.

Greece

Sources

- › Land area: Eurostat (2011): Organic crop area (2010). The Eurostat homepage. Last update: 11.10.2010.
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update November 5, 2010. The Eurostat homepage, Eurostat, Luxemburg
- › Market data (from 2006): Ekonzzept

Grenada

Data were provided by one international certifier.

Guadeloupe

Source

All data: Agence BIO (2011), The Agence Bio homepage 93100 Montreuil sous Bois, France. Available at http://www.agencebio.org/upload/pagesEditeurs/fichiers/CC_Ed2011_Chap8.pdf

Contact

Olivier Devillers, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Guinea Bissau

No new data were available for 2009, and it was confirmed by the international certifier, who had certified here in the past, that the activities had ceased.

Guatemala

Source

Department of Organic Agriculture, Ministerio de Agricultura, Ganadería y Alimentación (MAGA), Ciudad de Guatemala, Guatemala C.A. 01013, <http://www2.maga.gob.gt>

Contact

- › Alvaro Ramos, Ciudad de Guatemala MAGA, Guatemala
- › Loli Edeso, RUTA, San Jose, Costa Rica

Guyana

The data are from 2009.

Source

Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com.

Contact

Vincent Morel, Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com.

Haiti

Data were received from two international certifiers. One provided data for 2010, the other did not provide an update of the 2009 data.

Hungary**Sources**

- › Land area: Eurostat (2011): Organic crop area 2010. The Eurostat homepage. Last update: 11.10.2010
- › Operators: Eurostat (2011): Number of registered organic operators 2010. Last update November 5, 2010. The Eurostat homepage, Eurostat, Luxemburg
- › Market and trade data (from 2009): Survey of Biokorsar, Budapest, Hungary

Contact

- › Lea Bauer, Biokontroll Hungária, 1027 Budapest, Hungary, www.biokontroll.hu.
- › Dóra Kovács, Hungária Óko Garancia Kft., 1033 Budapest, Hungary, www.okogarancia.hu
- › Ferenc Frühwald, Biokorsar, Budapest, Hungary

Iceland**Source**

Vottunarfstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

Gunnar Gunnarsson, Vottunarfstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

India**Source**

- › Land area, operators, exports: Agricultural and Processed Food Products Export Development (APEDA) Ministry of Commerce & Industry, Govt of India, New Delhi - 110 016, India, www.apeda.com.
- › Market data: Research and Markets (2010): Organic Food Market in India 2010. The Research and Markets homepage, April 2010. Available at http://www.researchandmarkets.com/product/b4b727/organic_food_market_in_india_2010, Accessed October 22, 2010

Contact

Dr. P.V.S.M. Gouri, Agricultural and Processed Food Products Export Development (APEDA), New Delhi, India, www.apeda.com

Indonesia**Source**

Indonesian Organic Alliance, Bangor, Indonesia (www.organicindonesia.org). Survey among the certifiers active in the country. In addition, data that two international certifiers provided to FiBL were included.

Contact

Lidya Ariesusanty, Indonesia Organic Alliance, Indonesia, www.organicindonesia.org

Revision of earlier data

The total organic area as communicated in the 2011 edition of The World of Organic Agriculture was revised.

Iran**Source**

Environmental Sciences Research Institute, Shahid Beheshti University ESRI, Evin, Tehran, Iran. The information is based on the data of the certifiers active in the country

Contact

Data provided by Hossein Mahmoudi, Environmental Sciences Research Institute, Shahid Beheshti University ESRI

Note

The total organic area as communicated in the 2011 edition of The World of Organic Agriculture was revised.

Ireland**Source**

- › Land area and land use (data from 2009): Department of Agriculture Fisheries and Food, Dublin, Ireland; Data provided by Eddie Mc Auliffe, Organic Unit, Department of Agriculture Fisheries and Food Johnstown Castle Estate, Wexford
- › Operators (data from 2010): Eurostat (2011): Number of registered organic operators 2010. Last update October 28, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Market data: Bord Bia, Dublin, Ireland, based on Data of Kantar

Contact

- › Philipp Cullen, Department of Agriculture Fisheries and Food, Johnstown Castle Estate, Co. Wexford, Ireland www.agriculture.gov.ie.
- › Rosaleen O'Shaughnessy, Bord Bia, Dublin, Ireland

Israel**Source**

Source for all data: Standardization and Accreditation Department Ministry of Agriculture and Rural Development Plant Protection and

Inspection Services (PPIS), Israel,
www.ppiseng.moag.gov.il/ppiseng/ISRAEL.

Contact

Pnina Oren Shnidor, Head Standardization and Accreditation Department Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Note

The data cover only the products exported to the European Union.

Italy

Sources

- › Land area/land use data: Eurostat (2011): Organic land area 2010. Last update August 18, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update October 6, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Market data: AssoBio, provided by Roberto Pinton, written communication of August 20, 2011

Contact

- › Roberto Pinton, Pinton Organic Consulting, Padova
- › Marta Romeo, SINAB, Ministry of Agriculture, Rome, Italy

Jamaica

Source

Jamaica Organic Movement JOAM, P.O. Box 5728, Kingston 6, Jamaica, www.joamltd.org

Contact

Trevor Brown, Jamaica Organic Movement JOAM, www.joamltd.org

Japan

- › Source primary production, export and import data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo 100 - 8950, Japan, www.maff.go.jp/e/index.html.
- › Source for domestic market data: Estimates by Masaya Koriyama, IFOAM Japan.

Contact

- › Satoko Miyoshi, Organic Communication Initiative, Tokyo, Japan, www.oci2010.org.
- › Masaya Koriyama, IFOAM Japan, www.ifoam-japan.net

Jordan

Source

Mediterranean Organic Agriculture Network MOAN c/o C.I.H.E.A.M.; Bari; Italy. The data are from 2008.

Contact

Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Note

No separate figure for the number of producers was available, the figure communicated is that for all operators in the country.

Kazakhstan

Source

The data were compiled by the Organic Centre of Kazakhstan (www.organiccenter.kz); a survey among the certifiers was carried out. The data refer to 2009.

Contact

- › Evgeniy Klimov, Director of the Organic Centre of Kazakhstan and director of the Foundation for Integration of Ecological Culture, 40, Almaty, Kazakhstan, www.organiccenter.kz

Kenya

Source

Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke. The data are collected among the organic operators in the country and cover most of the country's organic land/producers.

Contact

Jack Juma, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke.

Korea

Source

- › Land area, Land use, production, livestock: Environmentally-friendly Agriculture Dept, Ministry of Food, Agriculture, Fisheries and Forestry, South Korea
- › Sales data: National Agricultural Products Quality Management Service

Contact

- › Jennifer Chang, 2011 IFOAM OWC Korea Organizing Committee, Korean Federation of Organic Agriculture Organisations (KFSA), Republic of Korea

Kyrgyzstan

Source

- › Agricultural Commodity and Service Cooperative ACSC, Jamasheva 14B, Jalalabat, 720907, Kyrgyzstan, www.organicfarming.kg
- › To the data provided by ACSC the data of one international certifier were added by FiBL.

Contact

Shaknoza Kurbanalieva, Helvetas Programme Office in the Kyrgyz Republic:43/1 Grajdanskaya

St., 720022, Bishkek, Kyrgyzstan, e-mail program@helvetas.kg, www.helvetas.kg

Latvia

Source

- › Land area: Eurostat (2011): Organic crop area (2010). The Eurostat homepage. Last update: 11.10.2010.
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update November 5, 2010. The Eurostat homepage, Eurostat, Luxemburg

Laos

The data are from 2009.

Source

- › Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos with additions from, Helvetas Laos
- › PROFIL Project - Promotion of Organic Farming and Marketing in Lao PDR, Vientiane Capital, Lao PDR, www.laosorganic.com.
- › ICEA, Bologna, Italy

Contact

- › Thavisith Bounyasouk, Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos
- › Agung Nugroho, Helvetas Laos – PROFIL Project - Promotion of Organic Farming and Marketing in Lao PDR, PO Box 6367, Phonesavanh Neua Village, Sisattanak District, Vientiane Capital, Lao PDR, www.laosorganic.com.
- › Milena Belli, ICEA, Bologna, Italy

Lebanon

Source

Mediterranean Organic Agriculture Network (MOAN), maintained by IAM Bari

Contact

Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Notes

Whereas the 2009 data published in *The World of Organic Agriculture* were compiled by FiBL (based on information of the certifiers), the 2010 data were provided by the Mediterranean Organic Agriculture Network (MOAN), maintained by IAM Bari. The original data sources are the same though.

According to MOAN, the strong drop of the organic agricultural land is due to an improved counting system with which double counting was eliminated. Land use and crop details were not available for 2010. Due to the strong decrease of the overall organic area, it was not possible to use the crop data of the previous years.

No separate figure for the number of producers was available, the figure communicated is that for all operators in the country.

Lesotho

Source

Certifier data

Liechtenstein

Source

Ministry of Environmental Affairs, Land Use Planning, Agriculture and Forestry, 9490 Vaduz, Liechtenstein,

Contact

Data were provided by: Klaus Büchel, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.

Note

The data on land are based on figures from the Ministry of Agriculture and from calculations of an organic consultancy agency. Harvests are estimated. The data on the number of animals was estimated on the base of data from the Ministry of Agriculture on livestock units. Empirically most of the organic products are sold in Liechtenstein and Switzerland.

Lithuania

Source

- › Land area: Eurostat (2011): Organic crop area (2010). The Eurostat homepage. Last update August 18, 2011
- › Operators: Eurostat (2010): Number of registered organic operators (2009). Last update November 5, 2010. The Eurostat homepage, Eurostat, Luxemburg

Luxembourg

Source

- › Land area and operator data: Administration des Services Techniques de l'Agriculture ASTA, Luxembourg.
- › Land use: The data are from 2009
- › Market data : Biogros Estimate, 13 Parc d'Activité Syrdall, L-5365 Munsbach, www.biogros.lu/de/home/

Contact

- › Raymond Aendekerck, bio-LABEL – Sekretär, 13, rue Gabriel Lippmann, Parc d'activité Syrdall, L-5365 Munsbach, www.biolabel.lu
- › Monique Faber, Administration des Services Techniques de l'Agriculture (ASTA), 1019 Luxembourg, www.asta.etat.lu.
- › Aender Schanck, Biogros, 13 Parc d'Activité Syrdall, L-5365 Munsbach, www.biogros.lu/de/home/

Macedonia, The Former Yugoslav Republic

Source

- › Ministry of agriculture, forestry and water economy, Skopje, and PROBIO, Skopje, Macedonia, www.probio.com.mk
- › In addition, wild collection data from one international certifier were added.

Contact

Gordana Pecelj, PROBIO, Skopje, Macedonia, www.probio.com.mk

Madagascar

Source

- › Australian Certified Organic ACO, Chermside, Australia, www.aco.net.au (2009 data)
- › Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com
- › ICEA Foreign Office, 40121 Bologna, Italy, www.icea.info
- › LACON GmbH, Brünnesweg 19, 77654 Offenburg, Germany; Contact; Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Contact

- › Milena Belli, ICEA Foreign Office, 40121 Bologna, Italy, www.icea.info
- › Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com
- › Akiko Nicholls, Australian Certified Organic ACO, Chermside, Australia
- › Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Malawi

Source

Malawi Organic Growers Association (MOGA), PO BOX 20288, LILONGWE, Malawi (2009) and data from two international certifiers.

Contact

Stanley Chidaya Malawi Organic Growers Association (MOGA), PO BOX 20288, Lilongwe, Malawi

Note

A direct-year-to-year comparison is not possible due to changing data sources and due to the fact that the data from one source could be updates whereas not for the others.

Malaysia

Source

Organic Alliance Malaysia, Penang, Malaysia, www.organicmalaysia.com.my. The data are from 2009.

Contact

Data provided by Ong Kung Wai, Humus Consultancy, Penang, Malaysia

Mali

Sources

The data were compiled by FiBL and IFOAM, based on the data of the following international certifiers.

- › CERTISYS, Walhain, Belgium, www.certisys.be
- › Control Union, Zwolle, The Netherlands, www.controlunion.org;
- › Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Contact

- › Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherland
- › Emmeline Foubert, CERTISYS, Walhain, Belgium, www.certisys.be
- › Data provided by Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Malta

Source

- › Land area: Eurostat (2011): Organic crop area (2010). The Eurostat homepage. Last update: September 23, 2011.
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update October 6, 2011. The Eurostat homepage, Eurostat, Luxemburg

Martinique (France)

Source

All data: Agence BIO (2011), The Agence Bio homepage 93100 Montreuil sous Bois, France.

Available at

http://www.agencebio.org/upload/pagesEdito/fichiers/CC_Ed2011_Chap8.pdf

Contact

Olivier Devillers, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Mauritius

The data were provided by two international certifiers., one of who provided data about Mauritius for the first time.

Data revision

The figures communicated in the editions of "The World of Organic Agriculture" prior to 2010 did not refer to certified organic areas and have therefore been removed from the database.

Mexico**Source**

Universidad Autónoma Chapingo, own data (based on data of the certifiers). The data are from 2008.

Note

The share of the organically managed land of the total land was calculated on the basis of data provided by the Universidad Autónoma Chapingo; they are not the same as the FAO data for the total agricultural land.

Contact

Rita Schwentesius, Universidad Autónoma Chapingo, Carretera México - Texcoco Km. 38.5. Chapingo, Estado de México

Moldova**Source**

Ekocconnect, Dresden, Germany, www.ekoconnect.org and Iurie Senic, Ministry of Agriculture and Food Industry of the Republic of Moldova MAIA, Chisinau, Moldova, <http://www.maia.gov.md>. The data are from 2009.

Contact

Bernhard Jansen, Ekocconnect, Dresden, Germany www.ekoconnect.org

Mongolia

No data were received from Mongolia.

Montenegro**Source**

- › Land area/operators: Ministry of Agriculture, Forestry and Water Management, Podgorica, Montenegro.
- › Market data: Ecozept - Market research and marketing consulting agency. Freising, Germany

Contact

- › Radana Damjanović, Ministry of Agriculture, Forestry and Water Management, Podgorica, Montenegro.
- › Dr. Burkhard Schaer, schaer@ecozept.com - www.ecozept.com

Morocco**Source**

Mediterranean Organic Agriculture Network MOAN, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Contact

Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Note

For 2010 no land use and crop data were available (neither for the wild collection areas). The breakdown of the agricultural land is therefore from 2009, but it should be borne in mind that the overall organic agricultural land has increased substantially in 2010.

Note on producer data

No separate figure for the number of producers was available, the figure communicated is that for all operators in the country.

Mozambique**Sources**

Data were provided by two international certifiers. As data were available from more certifiers (compared to last survey) a direct-year to year comparison is not possible.

Note

Some of the area data provided here are FiBL estimates based on the data from one certifier who, for some crops, only provided production volumes but no area data.

The data, even though from the same certifier, cannot be compared to those of the previous year.

Myanmar

Source; Panyakul, Vitoon (2012): Organic agriculture in Myanmar. In: The Organic Standard, Issue 129/January 2012,

Note

The data published in this edition are based on data from the Myanmar Organic Agriculture Group (MOAG) and the ACT,, a certifier from Thailand. The data published in the 2011 edition of "The World of Organic Agriculture" were based on information of one international certifier, who did not report any activities for 2010. A direct year-to-year comparison is therefore not possible.

Namibia**Source**

To the data provided by the Namibian Organic Association, PO Box 1504, Okahandja, Namibia, the figures from one international certifier were added.

The data are from 2009.

Contact

Manjo Smith, Namibian Organic Association (NOA), PO Box 1504, Okahandja, Namibia

Nepal**Source**

Data are based on the information provided by different certified operators in Nepal. The survey

was carried out by Maheswar Ghimire, Kathmandu, Nepal. Source for the wild collection data is the Asia Network for Sustainable Agriculture and Bioresources ANSAB, Kathmandu, Nepal, www.ansab.org.

Note

For the figure on the area under coffee it should be noted that on these areas also mixed cropping of spices is taking place.

Contact

Maheswar Ghimire, Kathmandu, Nepal

Netherlands

Sources

- › Land use details/crops: Eurostat (2011): Organic crop area (2010). Netherlands. Last Update: August 18, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Operators: Eurostat (2011): Number of registered organic operators (2010).. Last update October 6, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Market data data (from 2010): Source: Market report 2011. Biologische internationale handel. WUR, Wageningen.
- › Bakker, J and Bunte, F. (2009) Biologische internationale handel. WUR, Wageningen.

Contact

- › Dr. Johan Bakker, LEI Wageningen UR, Den Haag, The Netherlands
- › Marian Blom, Biologica, Utrecht, The Netherlands

New Zealand

The data are from 2009.

Source

Organics Aotearoa New Zealand OANZ, Wellington, New Zealand, www.oanz.org.nz; Published in Cooper, Mark, et. al. (2010): New Zealand Organic Report 2010. Organics Aotearoa New Zealand.

Nicaragua

The data are from 2009.

Source

Ministerio Agropecuario y Forestal MAGFOR, Managua, Nicaragua, www.magfor.gob.ni,

Contact

Mauricio Carcache Vega, MAGFOR, Managua, Nicaragua

Niger

Data source: Certifier data.

Nigeria

Source

The data were compiled by FiBL and IFOAM based on the data of two international certifiers. The data on the organic land are from 2010, the number of producers is from 2008. One of the certifiers who had reported activities in 2009, did not report any activities for 2010.

Niue

Source

Survey of Women in Business Development Inc, PO Box 6591 Apia, Samoa, www.womeninbusiness.ws, based on certifier data. The data are from 2006

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

Norway

Sources

- › Land area and land use: Eurostat (2011): Organic crop area Norway (2010). Last Update: August 18, 2011. The Eurostat Homepage
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update August 28, 2011. The Eurostat homepage, Eurostat, Luxemburg
- › Market data: SLF, Oslo, Norway, www.slf.dep.no

Contact

› Elin Røsnes, Norwegian Agricultural Authority SLF, Oslo, Norway, www.slf.dep.no

Oman

Source

Kassel University, Witzenhausen, Germany, www.uni-kassel.de/agrar/?language=en.

Contact

Prof. Dr. Andreas Bürkert, Kassel University, Witzenhausen, Germany, www.uni-kassel.de/agrar/?language=en.

Pakistan

Source

Data were provided by two international certifiers. Only one provided updated data for 2010. Regarding the number of producers: One certifier only reported the number of production units (counted as “producers”), but not of all farms involved in the project. Therefore, the number of producers is probably higher.

Palestine, Occupied Territories**Source**

Mediterranean Organic Agriculture Network
MOAN, C.I.H.E.A.M. - Istituto Agronomico
Mediterraneo di Bari, Italy, www.iamb.it.

Contact

Dr. Lina Al Bitar and Dr. Marie Reine Bteich,
C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di
Bari, Italy, www.iamb.it.

Note

There was no separate figure for the number of
producers, the number presented here refers to all
operators in the country.

Panama**Source**

Ministerio de Desarrollo Agropecuario, Dirección
Nacional de Sanidad Vegetal, Panama.

Contact

Loli Edeso, RUTA, San José, Costa Rica

Note

This figure is from a different source than the
figure communicated previously, a direct year-to-
year comparison is therefore not possible.

Papua New Guinea**Source**

› Survey of Women in Business Development
Inc, PO Box 6591 Apia, Samoa,
www.womeninbusiness.ws, based on certifier
data. The data refer to 2006.

› To these data, recent data from one
international certifier were added.

Contact

Karen Mapusua, Secretariat of the Pacific
Community (SPC), Private Mail Bag, Suva FIJI,
www.spc.int

Paraguay**Source**

MAG/ALTERVIDA/IICA (March 2008):
MAG/ALTERVIDA/IICA : Estrategia Nacional para
la Promoción de la Producción Orgánica. Provided
by Genaro Coronel, SENVE; Paraguay, Available at
www.mag.gov.py/ESTRATEGIA%20NACIONAL.pdf.

The data are from 2007.

Peru**Source**

› Subdirección de Producción Orgánica,
Ministerio de Agricultura – SENASA. Lima, Perú
› Market and Trade data: PromPeru, San Isidro
- Lima 27 Perú, www.promperu.gob.pe. The total
on domestic market is an estimate, based the data

from Promperu that the market must be between
13.1 and 23.2 million US dollars.

Contact

› Dr. Jorge Leonardo, Jave Nakayo, Director,
Subdirección de Producción Orgánica, SENASA,
Ministerio de Agricultura Lima, Perú.
› Javier Martinez, PromPeru, San Isidro - Lima
27 Perú, www.promperu.gob.pe.

Philippines**Source**

The data were compiled by FiBL from a number of
certifiers. The data are more complete than the
data communicated in editions of *The World of
Organic Agriculture* prior to 2011. A direct year-to-
year comparison over the years is therefore not
possible.

Certifiers who provided data

- › BCS, Nürnberg, Germany, www.bcs-oeko.de;
- › Ceres, Happburg, Germany, www.ceres-cert.com;
- › Control Union, Zwolle, The Netherlands,
www.controlunion.org;
- › Ecocert, L'Isle Jourdain, France,
www.ecocert.com;
- › Naturland, Gräfelfing, Germany,
www.naturland.de;
- › Organic Certification Center of the
Philippines OCCP, Barangay Laging Handa,
Quezon City, Philippines, www.ocpphils.org.

Contact

- › Gyorgyi Acs Feketene, Control Union, Zwolle,
The Netherlands, www.controlunion.org;
- › Tobias Fischer, BCS, Nürnberg, Germany,
www.bcs-oeko.de;
- › Simone Groh, Ceres, Happburg, Germany,
www.ceres-cert.com;
- › Lani Katimbang-Limpin, OCCP, Quezon City,
Philippines, www.ocpphils.org
- › Vincent Morel, Area Manager, Ecocert, L'Isle
Jourdain, France, www.ecocert.com;
- › Manfred Fürst, Naturland, Gräfelfing,
Germany, www.naturland.de.

Note

- › Not all certifiers provided data on the
number of producers, which therefore must be
higher than communicated here.
- › Not all certifiers provided data for 2010.

Poland**Source**

- › Land area and land use Eurostat (2011):
Eurostat (2011): Certified organic crop area.
Last update August 18, 2011. The Eurostat
homepage, Eurostat, Luxemburg
- › Operators: Eurostat (2011): Number of
registered organic operators (2010). The
Eurostat homepage, Eurostat, Luxemburg

- › Market data: German Trade and Invest (2011): Trend zu mehr Bio-Nahrungsmitteln in Polen. Datenbank Länder und Märkte. GTAI, Berlin, 24.5.2011, <http://www.gtai.de>

Contact

Andrzej Szeremeta, IFOAM EU Group, Brussels, www.ifoam-eu.org

Portugal**Source**

- › Land use and operators : Ministério da Agricultura, do Desenvolvimento Rural e das Pescas
- › Market data: INTERBIO, <http://www.interbio.pt>

Contact

- › Data supplied by Caterina Cristosomo, Portugal

Réunion**Source**

All data: Agence BIO (2011), The Agence Bio homepage 93100 Montreuil sous Bois, France, Available at http://www.agencebio.org/upload/pagesEdito/fichiers/CC_Ed2011_Chap8.pdf

Contact

Olivier Devillers, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Romania**Sources**

- › Organic area; land use: Eurostat (2011): Organic crop area. Romania (2010 Eurostat (2011): Certified organic crop area. Last update August 18, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update August 18, 2011. Last update August 18, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Wild collection: Ministry of Agriculture MADR, Bucarest, Romania; <http://www.madr.ro/pages/page.php?self=01&sub=0107&tz=010710>.

Russia**Source**

Survey among the certifiers active in the country, carried out by Eco-control Ltd., 141506 Solnechnogorsk, Russia, www.eco-control.ru

Contact

Dr. Andrey Khodus, Eco-control Ltd., 141506 Solnechnogorsk, Russia, www.eco-control.ru

Rwanda**Source**

Ecocert S.A., Villa Arimanantsoa, Madagascar., www.ecocert.com

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar., www.ecocert.com.

Samoa**Source**

Women in Business Development Inc, PO Box 6591 Apia, Samoa, www.womeninbusiness.ws.

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

San Marino

For San Marino one processor had been reported previously, but it was not reported for the current survey.

Sao Tome and Principe**Source**

Ecocert West Africa, Ougadougou, Burkina Faso

Contact

Data provided by Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Saudi Arabia**Source**

Organic Unit at the Ministry of Agriculture of the Kingdom of Saudi Arabia P.O. Box 2730, 11461 Riyadh, Saudia Arabia

Contact

Dr. Marco Hartmann, Team Leader - Executive Project Manager, Organic Farming Project, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH gtz/German Technical Cooperation IS, c/o Ministry of Agriculture of the Kingdom of Saudi Arabia P.O. Box 2730, 11461 Riyadh, Saudi Arabia, www.giz.de and www.moa.gov.sa/organic

Senegal**Source**

National Federation for Organic Agriculture, AGRECOL BP. 347 Thiès, Sénégal.

To the figures of the National Federation for Organic Agriculture, the figures of three international certifiers were added. A direct year-to-year comparison is therefore not possible. For the number of producers the data provided by the Association Sénégalaise pour la Promotion de

ANNEX: DATA PROVIDERS AND DATA SOURCES

l'Agriculture Biologique ASPAB, BP. 412 Thiès, Sénégal for 2009 were used as well as the data of the certifiers.

Contact

- › Famara Diedhioe, National Federation for Organic Agriculture, AGRECOL BP. 347 Thiès, Sénégal.
- › Ibrahima Seck, Association Sénégalaise pour la Promotion de l'Agriculture Biologique ASPAB, BP. 412 Thiès, Sénégal

Serbia

Source

GIZ, Novi Sad. Survey among certifiers.

Contact

Marija Kalentic, GIZ, Novi Sad

Note

The data published here include the data from more certifiers than communicated for the years before 2009. A direct year-to-year comparison is therefore not possible.

Sierra Leone

Source

Certifier data

Singapore

Two international certifiers reported a number of processors.

Slovakia

Sources

- › Land use/Crops: Eurostat (2011): organic crop area 2010. Last update December 5, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Operators: Eurostat (2010): Number of registered organic operators (2009). Last update November 5, 2010. The Eurostat homepage, Eurostat, Luxembourg. The operator data are from 2009.
- › Market data: Ecozept, market research and marketing consulting agency. Freising, Germany. Eastern Europe organic market report.

Slovenia

Sources

- Land use details/crops: Eurostat (2011): Organic crop area (2010). Netherlands. Last Update: August 18, 2011. The Eurostat homepage, Eurostat, Luxembourg
- Operators: Eurostat (2011): Number of registered organic operators (2010). Last update

October 6, 2011. The Eurostat homepage, Eurostat, Luxembourg

- Market data: Institute for Sustainable Development, Ljubljana, Slovenia

Contact

Anamarija Slabe, Institute for Sustainable Development, Ljubljana

Solomon Islands

Sources

Kokonut PacifiK, Solomon Islands. Hawker, Australia bob.pollard1@gmail.com

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

Somalia

No new data were reported for Somalia.

South Africa

Source

The data were compiled by FiBL and IFOAM based on the data of the following international certifiers.

- › Afrisco, Lynnwood, South Africa, www.afrisco.net
- › BCS, Nürnberg, Source, BCS
- › Control Union, Zwolle, The Netherlands, www.controlunion.org
- › Ecocert Southern Africa, Gardens Cape Town, www.ecocert.com
- › IMO, Weinfelden, Switzerland, www.imo.ch
- › LACON GmbH, Brunnlesweg 19, 77654 Offenburg, Germany
- › Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification

Contact

- › Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherland
- › Christina Auerbach, Rainman Landcare Foundation, Hillcrest, South Africa
- › Prof. Dr. Raymond Auerbach, Nelson Mandela Metropolitan University, George, South Africa
- › Vivien Hodgson, Soil Association Certification Limited, Bristol, UK
- › Diana Callear, Afrisco, Lynnwood, South Africa, www.afrisco.net
- › Tobias Fischer, BCS, Nürnberg, Source, BCS
- › Peter Horner, IMO, Weinfelden, Switzerland
- › Clifyn Mckenzie, Ecocert Southern Africa, Gardens Cape Town
- › Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Spain

Sources

- › Land use, operators: Eurostat (2011): Certified organic crop area. Last update August 18, 2011. The Eurostat homepage, Eurostat, Luxembourg and Ministerio de Medio Ambiente y Medio Rural y Marino MARM (2011): Estadísticas 2010 - Agricultura Ecológica. Madrid, Spain, The MARM website
<http://www.marm.es/es/alimentacion/temas/la-agricultura-ecologica/documentos-de-interes/>
- › The wild collection data are according to MARM
- › Market data (from 2009) Ministerio de Medio Ambiente, Medio Rural y Marino 2010: Valor y Volumen de los productos ecológicos de origen nacional en la industria agroalimentaria española, Madrid 2010

Note on the market data

It should be noted that the figure for the domestic market data communicated in this volume are from 2009 and are from a different source and a direct year to year comparison with the figures communicated earlier is not possible.

Contact

Gonzálvez Pérez, Spanish Society of Organic Agriculture SEAEEm, Catarroja (Valencia), Spain, www.agroecologia.net

Sri Lanka

Source

The data were compiled by FiBL from two international certifiers. Only one of the certifiers provided new data on the number of producers (and the previous figure was not used as the number of companies had decreased). The number of producers must therefore be higher than communicated in this book.

Sudan

The data were supplied by several certifiers providing services in the country.

Suriname

Data source: Certifier data.

Swaziland

Data source: Certifier data.

Sweden

Sources

- › Land area/land use: Eurostat (2011): Organic Corp Area. Sweden. Last update: August 18, 2011. The Eurostat Homepage, Eurostat, Luxembourg
- › Operators: Eurostat (2011): Number of registered organic operators. Last update October 10, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Market data: Source: Central Statistical Office SCB, Stockholm, Sweden

Contact

Katerina Wolf, KRAV, Uppsala, Sweden

Switzerland

Sources

- › Land area, land use data and producer data compiled by FiBL; based on the data of the certifiers.
- › Market data: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioinzaehlen.php.

Contact

Helga Willer, FiBL, Frick, Switzerland

Syria

Mediterranean Organic Agriculture Network MOAN c/o C.I.H.E.A.M; Bari; Italy.

Contact

Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Notes

- › No separate figure for the number of producers was available, the figure communicated is that for all operators in the country.
- › Crop data were not available for 2010 and it was not possible to use the data from the previous year due to the decrease of the overall organic agricultural land.

Taiwan

Source

Taiwan Organic Agriculture Information Centre. Statistics 1996-2009 at info.organic.org.tw/supergood/front/bin/ptlist.phtml?Category=104854
The data are from 2009.

Tajikistan

Source

- › SAS - SUGDAGROSERV, 2 Baraka Boboeva, Khujand 735700, Tajikistan.
- › To these data, the data of one international certifier were added.

Contact

Javohir Eshmatov, SAS - SUGDAGROSERV, 2 Baraka Boboeva, Khujand 735700, Tajikistan.

Tanzania

The data are from 2008.

Source

Tanzania Organic Agriculture Movement (TOAM), PO Box 70089, Dar es Salaam, Tanzania, www.kilimohai.net. Survey among the organic operators in the country. Figures from the previous survey were used, as no new data were available for this survey.

Contact

Noel C. Kwai, Tanzania Organic Agriculture Movement (TOAM), PO Box 70089, Dar es Salaam, Tanzania, www.kilimohai.net.

Thailand**Source**

Green Net Survey among the international and domestic certifiers; Green Net, 10330 Bangkok, Thailand

Contact

Data provided by Vitoon Panyakul, Green Net, 10330 Bangkok, Thailand, www.greennet.or.th.

Timor-Leste**Source**

The data are based on the information of one international certifier.

Togo

The data were compiled by FiBL based on the data of the following international certifiers.

- › Ecocert, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com
- › IMO, Weinfelden, Switzerland, www.imo.ch
- › LACON GmbH, Brünnesweg 19, 77654 Offenburg, Germany

Contact

- › Peter Horner, IMO, Weinfelden, Switzerland
- › Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso
- › Fabienne Verzeletti, LACON GmbH,

Tunisia**Source**

- General Direction of Organic Agriculture, Tunis, Tunisia; provided at the Homepage of CTAB at http://www.ctab.nat.tn/ang/d_bio_ang.pdf

Turkey**Source**

- › Ministry of Agriculture MARA, Ankara, Turkey, www.tarim.gov.tr.
- › Market data (2009): Estimate by Erdal Süngü, Ministry of Agriculture MARA, Ankara, Turkey, www.tarim.gov.tr.

Contact

Erdal Süngü, Ministry of Agriculture and Rural Affairs MARA, Ankara, Turkey, www.tarim.gov.tr.

Note

Some areas contain crops, that can be harvested from the same parcel. Therefore the total of the land use detail data exceeds the actual area surface cultivated for organic farming. A correction value was used in order to calculate the correct total. Data on the organic domestic market value are roughly estimated.

Uganda**Source**

National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug. Data source: Survey among organic operators in the country. The data refer to 2009/2010.

Contact

Charity Namuwoza, National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug

Ukraine**Source**

Survey among the organic operators and certifiers in the country, carried out by the Organic Federation of Ukraine (OFU), Kiev, Ukraine www.organic.com.ua.

Contact

Eugene Milovanov, Organic Federation of Ukraine, Kiev, Ukraine www.organic.com.ua.

United Arab Emirates**Source**

The data were compiled by FiBL and are based on certifier data.

- › ICEA, Bologna, Italy, www.icea.info;
- › Control Union, Zwolle, The Netherlands, www.controlunion.org;
- › Ecocert, L'Isle Jourdain, France, www.ecocert.com.

Contact

- › Milena Belli, ICEA, Bologna, Italy, www.icea.info;
- › Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org;

- › Vincent Morel, Area Manager, Ecocert, L'Isle Jourdain, France, www.ecocert.com.

United Kingdom

Sources

- › Land use details/crops: Eurostat (2011): Organic crop area (2010). Last Update: August 18, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Operators: Eurostat (2011): Number of registered organic operators (2010). Last update October 6, 2011. The Eurostat homepage, Eurostat, Luxembourg
- › Market data: Soil Association 2011: Organic Market Report 2011. Bristol, United Kingdom

Uruguay

Source

Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay, www.mgap.gub.uy.

Contact

Betty Mandl, Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay, www.mgap.gub.uy.

Note

The data are from 2006

United States of America

Sources

- › Land area and producers (from 2008): United States Department of Agriculture, Washington, USA, www.ers.usda.gov/briefing/organic/.
- › Market data: Organic Trade Association 2010: Organic Industry Survey, Brattleboro VT 05301, USA, www.ota.com

Contact

- › Catherine Greene, United States Department of Agriculture, Washington, USA, www.ers.usda.gov/briefing/organic/.
- › Barbara Haumann, OTA, Brattleboro VT 05301, www.ota.com

Uzbekistan

Source

Certifier data, compiled by FiBL.

Vanuatu

Source

- › Land area and use: Department of Livestock and Quarantine. PMB 9095 PORT VILA
- › Operators: Department of Livestock and Quarantine. PMB 9095 PORT VILA

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

Venezuela

Source

The data were collected among two international certifiers. As the source has changed over the years, a direct-year-to-year comparison is not possible. The data are from 2009.

Viet Nam

Source

Survey of Agricultural Development Denmark-Asia (Vietnam), Hanoi, Vietnam

Contact

- › Koen den Braber, ADDA - Agricultural Development Denmark-Asia (Vietnam), Hanoi, Vietnam.

Zambia

Source

OPPAZ, Lusaka, Zambia

As the data source has changed over the years, a direct-year to year comparison is not possible. The data are from 2009.

Contact

Munshimbwe Chitalu, OPPAZ, Lusaka, Zambia

Zimbabwe

Source

Ecocert Southern Africa, Gardens Cape Town

Contact

Clifyn Mckenzie, Ecocert Southern Africa, Gardens Cape Town

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Afrisco Standards for Organic Production, South Africa

Green Growers Association Standard, South Africa

Kummandi Standard, South Africa

Organic Standards for Tancert, Tanzania

Uganda Organic Standard, Uganda

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Saudi Arabia Organic Regulation

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India Organic Regulation

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OFDC Organic Certification Standard, China

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MASIPAG Organic Standards, The Philippines

CONU Organic Standard, South Korea

DCOK, LLC International Standards, South Korea

GOAA International Standards, South Korea

ACT Basic Standard, Thailand

Vietnam PGS Standards, Vietnam

OCEANIA

National Standard for Organic and Bio-Dynamic Produce, Australia

New Zealand Organic Export Regulation

Pacific Organic Standard, Pacific Community

Australian Certified Organic Standard, Australia

NASAA Organic Standard, Australia

AsureQuality Organic Standard, New Zealand

BioGro Organic Standards, New Zealand

EUROPE

EU Organic Regulation

Switzerland Organic Regulation

Turkey Organic Regulation



Bio Suisse Standards, Switzerland

Organska Kontrola Standards for production and processing, Bosnia and Herzegovina

Biocyclic Standards, Cyprus

Nature & Progrès Standards, France

BioPark Guidelines for Organic Production and Processing, Germany

Ecoland Standards for Organic Agriculture and Food Production, Germany

Gäa Private Standards, Germany

Naturland Standards, Germany

CCPB Global Standard, Italy

Italian Organic Standard, Italy

Krav Standard, Sweden

SOUTH AMERICA

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Costa Rica Organic Regulation

Argencert Organic Standard, Argentina

LETIS IFOAM Standard, Argentina

OIA Organic Standards, Argentina

Bolicert Organic Standard for Production and Handling, Bolivia

Guidelines for the IBD Quality Organic Standard, Brazil

NORTH AMERICA

Canada Organic Regulation

USA Organic Regulation

DOAM Organic Standards, Dominica

Red Mexicana de Tianguis y Mercados Orgánicos' Standard, Mexico

CCOF Global Market Access Standard, USA

Farm Verified Organic Requirements Manual, USA

NOFA Standards for Organic Land Care, USA

QCS Int. Program Standard Manual, USA

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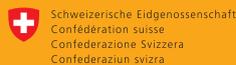
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