

Research Institute of Organic Agriculture Forschungsinstitut für biologischen Landbau Institut de recherche de l'agriculture biologique













Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2017

Part 3: Organic agriculture in the regions 2015

Julia Lernoud and Helga Willer Research Institute of Organic Agriculture (FIBL), Frick, Switzerland © FiBL 2017

# Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2017: Part 3: Organic agriculture in the regions 2015

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



#### **Acknowledgements\***

The Swiss State Secretariat of Economic Affairs SECO, Berne



Swiss Confederation

Federal Departement of Economic Affairs, Education and Research EAER State Secretariat for Economic Affairs SECO

International Trade Centre ITC



 Nürnberg Messe, the organizers of the BIOFACH World Organic Trade Fair



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

<sup>\*</sup> See also disclaimer on last page of this slide show



#### The World of Organic Agriculture 2017

The 17th edition of ,The World of Organic Agriculture', was published by FiBL and IFOAM in February 2017.\*

#### Contents:

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





#### Website www.organic-world.net

- Detailed statistics in excel format
- Graphs & maps
- > Data revisions
- News and background information





#### **About this presentation**

- There are 3 presentations summarizing the key results of the FiBL survey on organic agriculture worldwide 2017 (data 2015). Apart from the global data, key results on crop and on regional data are presented.
- More information is available at www.organic-world.net
- The following three presentations are available at http://www.organic-world.net/yearbook/yearbook2017/slidepresentations.html:
  - > Part 1: Global data 2015 and survey background
  - > Part 2: Land use and key crops in organic agriculture 2015
  - > Part 3: Organic agriculture in the regions 2015

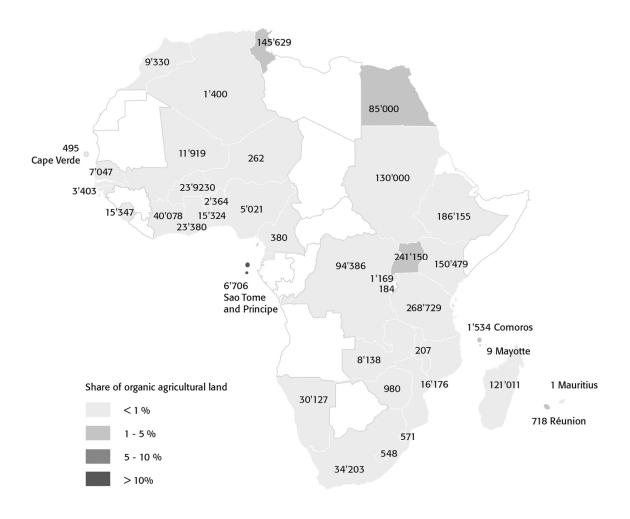


#### The 18th Survey on organic agriculture world-wide

- > The 18th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in cooperation with partners from all around the world. The results were published jointly by FiBL and IFOAM Organics International.
- > The survey was carried out between July 2016 and February 2017.
- > Data were received from 179 countries.
- New countries included: Brunei Darussalam, Cape Verde, Hong Kong, Kuwait, Monaco, Sierra Leone, and Somalia.
- > Updated data on area and producers were available for 161 countries.
- Data was provided by almost 200 country experts (representatives from NGOs, certification bodies, governments, researchers).
- The following data was collected: area data (including land use and crop details); producers, other operator types; domestic market values; export and import data; and livestock data (animal heads and production in metric tons);
- The results are published in the yearbook "The World of Organic Agriculture 2017" and at www.organic-world.net.



### Africa: Organic agricultural land by country 2015





#### Africa: Organic agriculture in Africa 2015

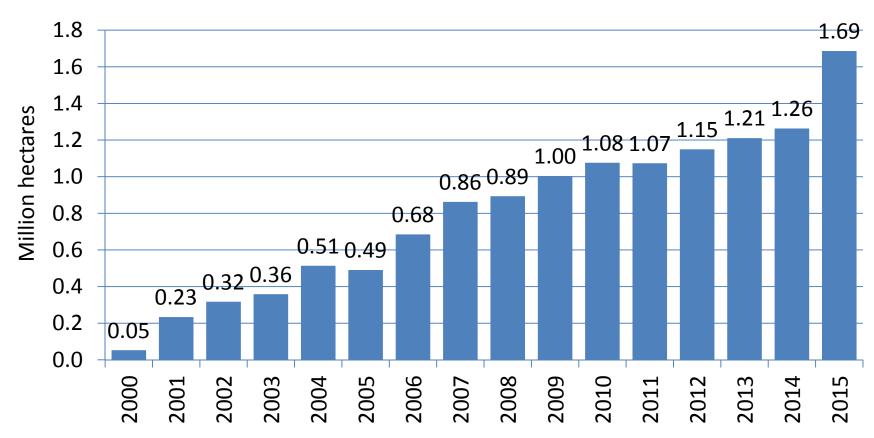
- In Africa, there were 1.7 million hectares of certified organic agricultural land (data 2015).
- > This constitutes about three percent of the world's organic agricultural landand 0.1 percent of the total agricultural area in the region.
- > 719'000 producers were reported.
- The countries with the most organic land are Tanzania (268'729 hectares), Uganda (241'150 hectares), and Ethiopia (186'155 hectares).
- The highest shares of organic land are in Sao Tome and Prince (13.8 percent), Egypt (2.3 percent), and Uganda (1.7 percent).
- The majority of certified organic produce in Africa is destined for export markets.
- > The European Union, as the major recipient of these exports, is Africa's largest market for agricultural produce.



#### Africa: Development of organic agricultural land 2000-2015

#### Africa: Development of organic agricultural land 2000 to 2015

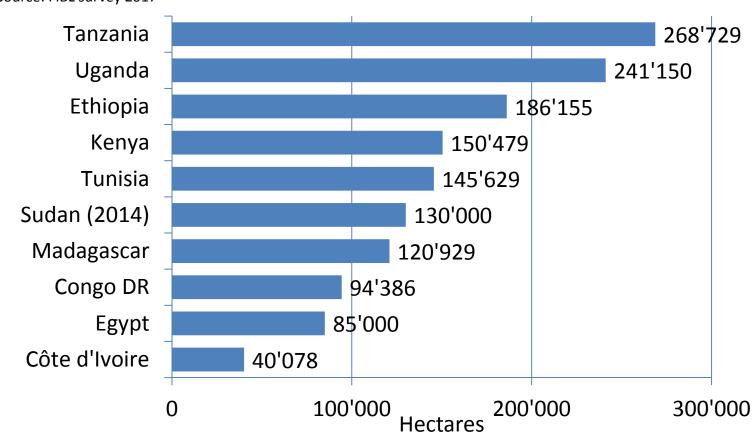
Source: FiBL-IFOAM-SOEL 2001-2017





# Africa: The ten countries with the most organic agricultural land 2015

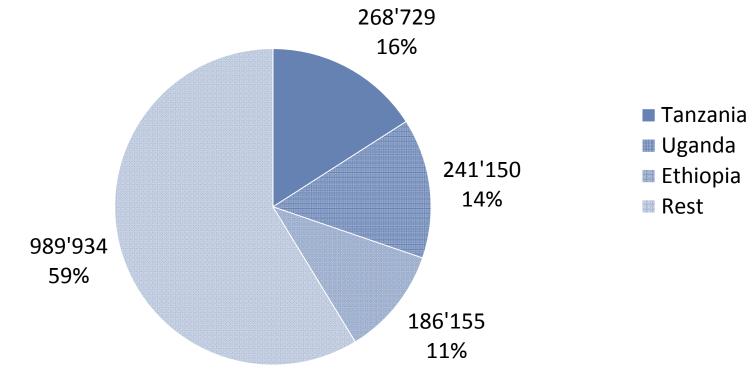
#### Africa: The ten countries with the largest organic area 2015





# Africa: Distribution of organically managed agricultural land by country 2015

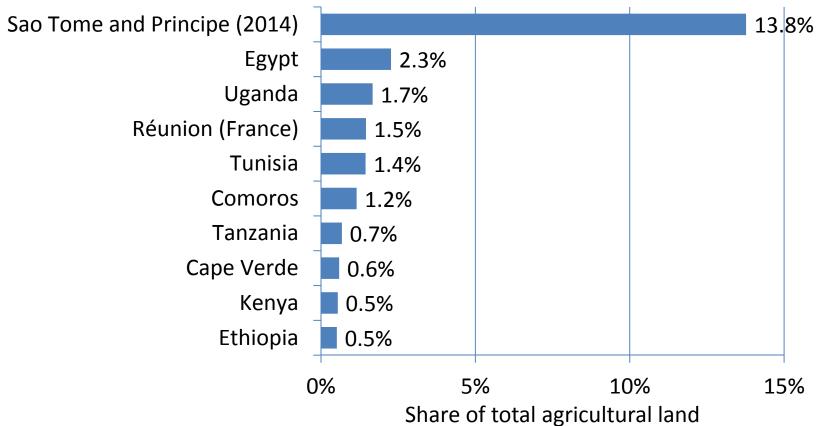
Africa: Distribution of organically managed agricultural land by country 2015





# Africa: The ten countries with the highest organic share of total agricultural land 2015

Africa: The countries with the highest organic share of total agricultural land 2015

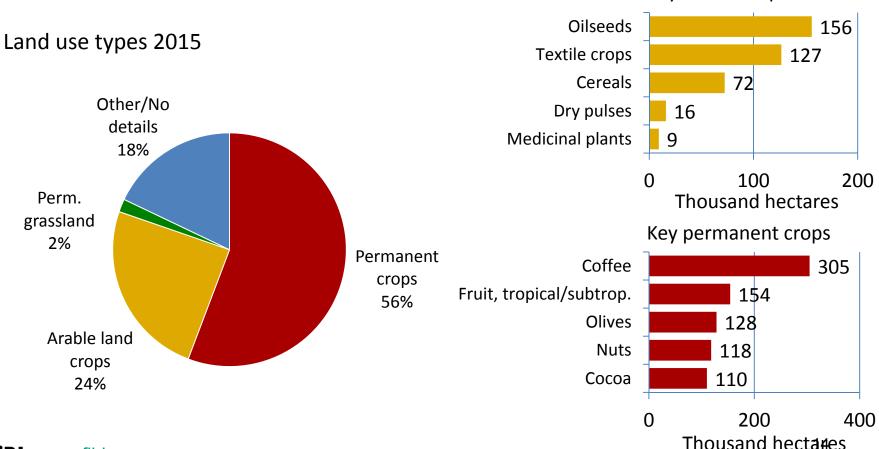




#### Africa: Use of organic agricultural land 2015

#### Africa: Use of organic agricultural land 2015

Source: FiBL survey 2017; based on information from the private sector, certifiers, and governments.

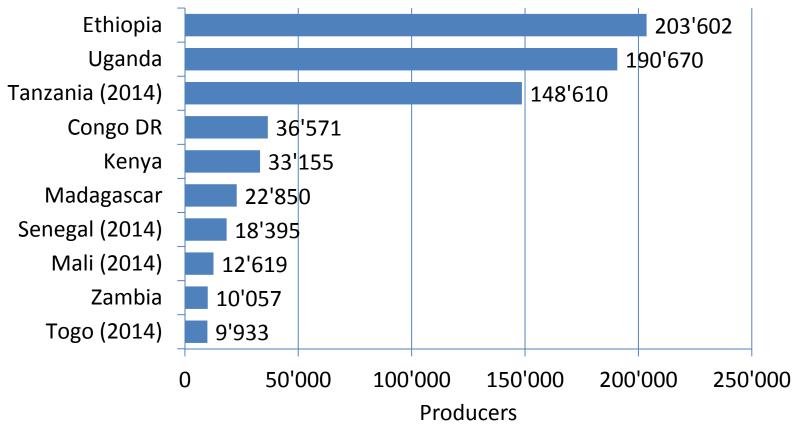


Key arable crops



# Africa: The ten countries with the largest number of organic producers 2015

Africa: The ten countries with the largest number of organic producers 2015





### Articles about Africa in the 2017 edition of "The World of Organic Agriculture"

- Latest Developments in Organic Agriculture in Africa,
  Jordan Gama
- Organic Farming in Kenya: Promising Growth and a Bright Future
   Richard Ngunjiri



#### Asia: Organic agricultural land by country 2015





#### Asia: Organic Agriculture in Asia – Key Figures 2015

- The total organic agricultural area in Asia was 4 million hectares in 2015.
- > This constitutes eight percent of the world's organic agricultural land, and 0.2 percent of the total agricultural area in the region.
- > There were more than 0.85 million producers reported.
- The leading countries by organic agricultural land are China (1.6 million hectares) and India (1.2 million hectares).
- Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent).

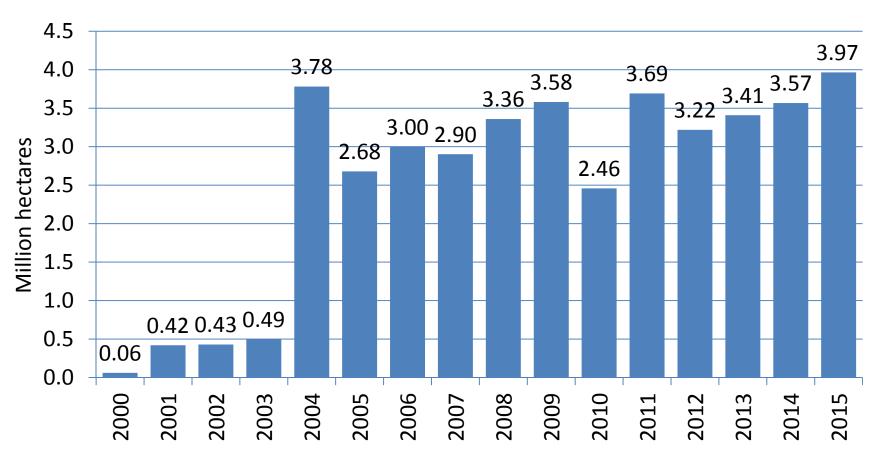
Source: FiBL survey 2017

L www.fibl.org

#### Asia: Development of organic agricultural land 2000-2015

#### Asia: Development of organic agricultural land 2000 to 2015

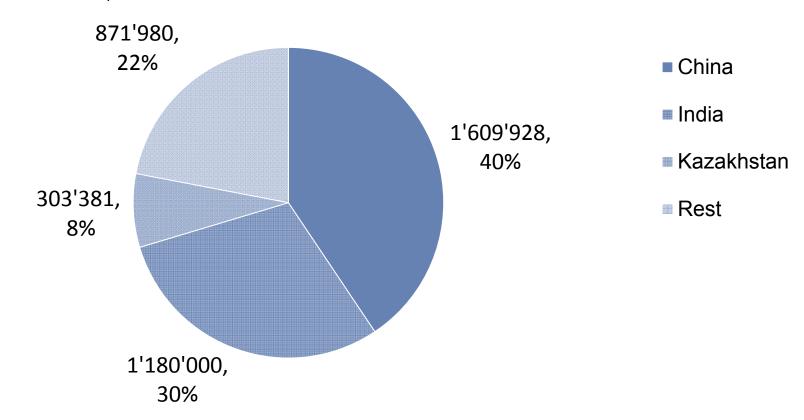
Source: FiBL-IFOAM-SOEL 2002-2017





# Asia: Distribution of organic agricultural land by country 2015 (total 4 million hectares)

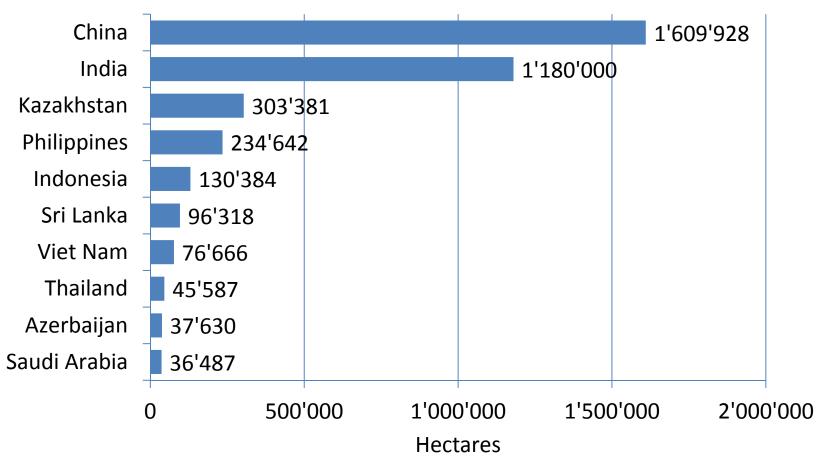
Africa: Distribution of organically managed agricultural land by country 2015





# Asia: The ten countries with the most organic agricultural land 2015

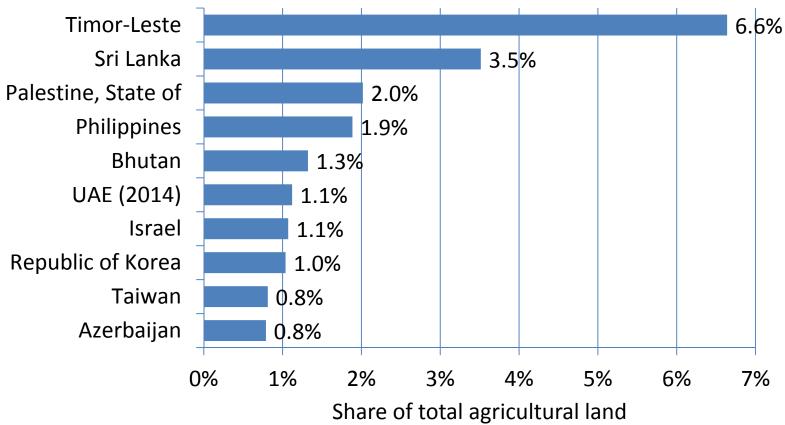
Asia: The ten countries with the largest organic area 2015





## Asia: The ten countries/territories with the highest shares of organic agricultural land 2015

Asia: The countries with the highest organic share of total agricultural land 2015

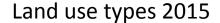


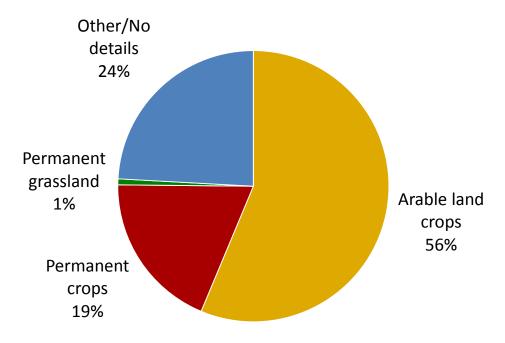


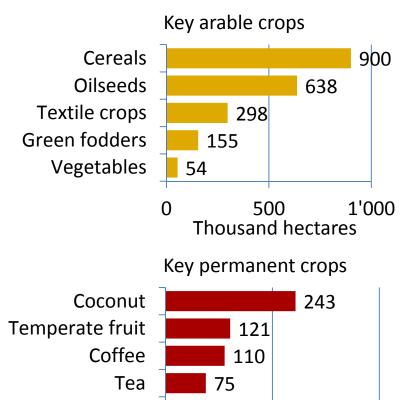
# Asia: Use of organic agricultural land 2015 (total: 4 million hectares)

#### Asia: Use of agricultural organic land 2015

Source: FiBL survey 2017; based on information from the private sector, certifiers, and governments.







67

200

Thousand hectares

Nuts

0



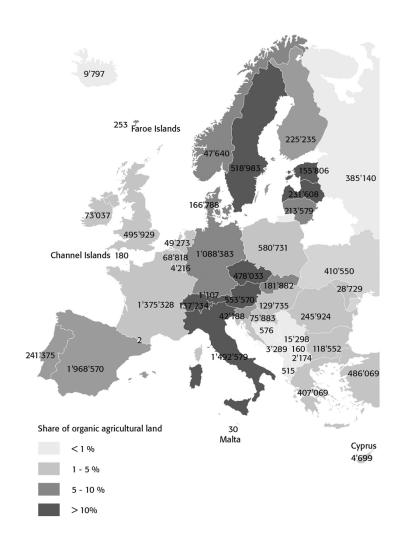
400

# Articles about Asia in the 2017 Edition of "The World of Organic Agriculture"

Development of the Organic Sector in Asia in 2016
 IFOAM Asia



### **Europe: Organic agricultural land by country 2015**





### Organic agriculture in Europe: Key data/indicators 2015

- 12.7 million hectares of agricultural land are organic (including in conversion areas).
- This constitutes 2.5 percent of the agricultural land in Europe.
- The organic agricultural land increased by 0.96 million hectares or 8.2 percent in 2015.
- > Almost 350'000 producers were reported.



### Organic agriculture in the European Union: Key data/indicators 2015

- 11.2 million hectares of agricultural land are organic (including in conversion areas).
- > This constitutes 6.2 percent of the agricultural land in the European Union.
- The organic agricultural land increased by 0.8 million hectares or 7.8 percent in 2015.
- > Almost 270'000 producers were reported.



### Organic market in Europe: Key data/indicators 2015

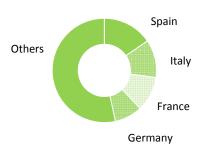
- The European market was 29.8 billion euros; 13 percent more than in 2014.
- The largest market for organic products in 2015 was Germany with a turnover of 8.6 billion euros, followed by France (5.5 billion euros) and the UK (2.6 billion euros).
- As a portion of the total market share, the highest levels have been reached in Denmark, Switzerland and Luxembourg, with six percent or more for organic products. The highest per capita spending is also in these countries.



#### **EUROPE: ORGANIC FARMLAND 2015**



Half of Europe's organic farmland is in 4 countries.

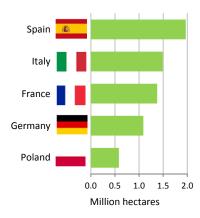


Distribution of organic agricultural land by country 2015





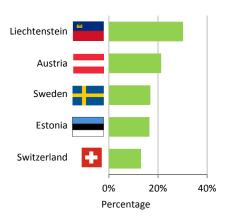
The country with the largest area of organic farmland is in Spain, followed by Italy and France.



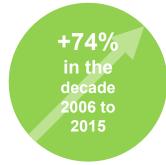
Top 5 countries with the largest areas of organic agricultural land 2015



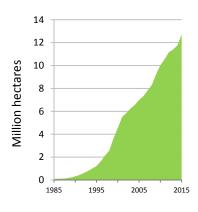
Nine countries have 10% or more of their agricultural land under organic management.



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



In 2015, almost 1 million hectares more were reported compared with 2014.

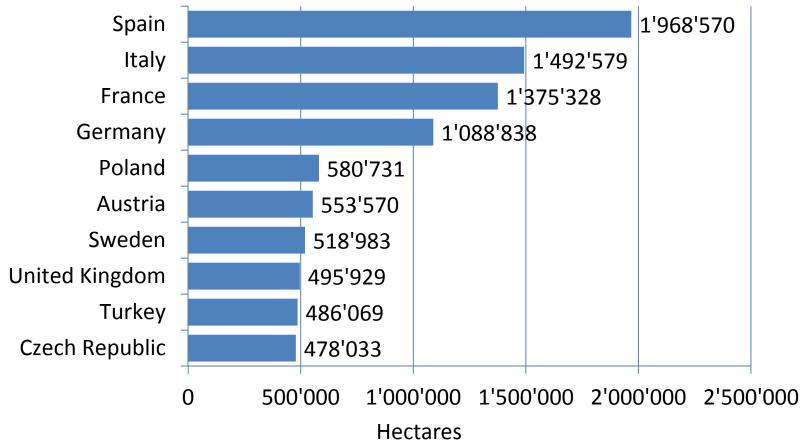


Growth of the organic agricultural land 1985–2015

### Europe: The ten countries with the most organic agricultural land 2015

#### **Europe: The ten countries with the largest organic area 2015**

Source: FiBL-AMI survey 2017, based on national data sources and Eurostat



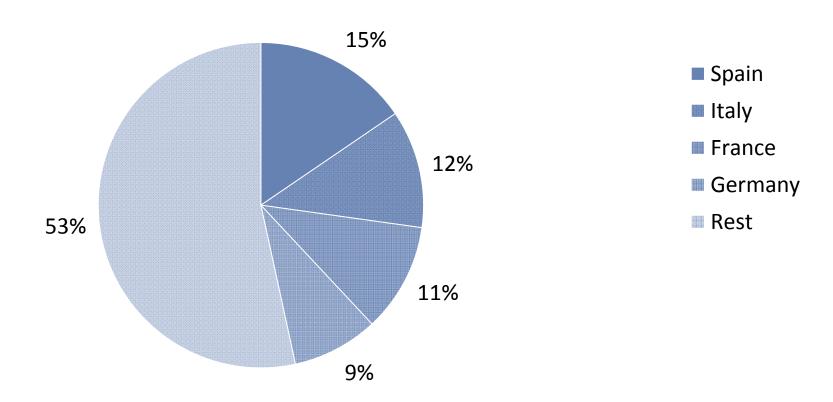


# Europe: Distribution of organically managed agricultural land by country 2015

Europe: Distribution of organically managed agricultural land

by country 2015 (Total: 12.7 million hectares)

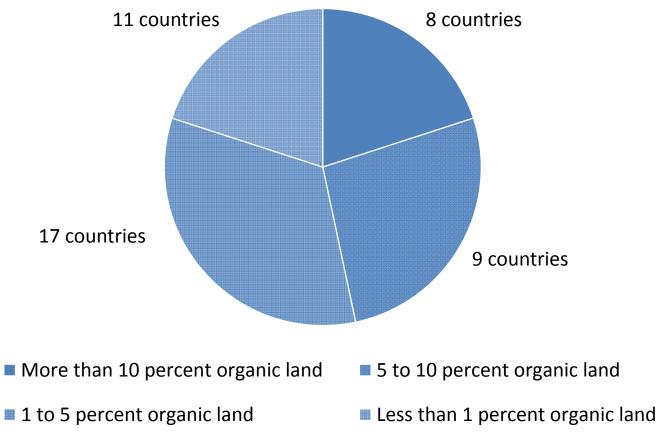
Source: FiBL-AMI survey 2017, based on national data sources and Eurostat





#### **Europe: Distribution of shares of organic land** 2015

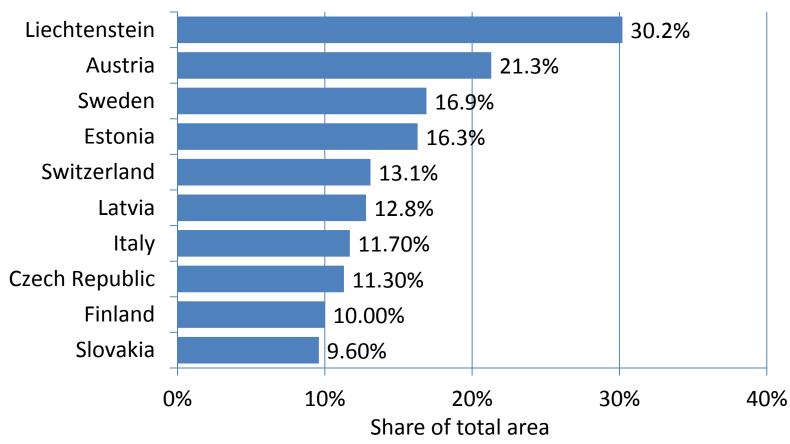
#### **Europe: Distribution of organic farmland shares 2015**



### Europe: The ten countries with the highest shares of organic agricultural land 2015

#### **Europe: Shares of organic agricultural land by country 2015**

Source: FiBL-AMI Survey 2017

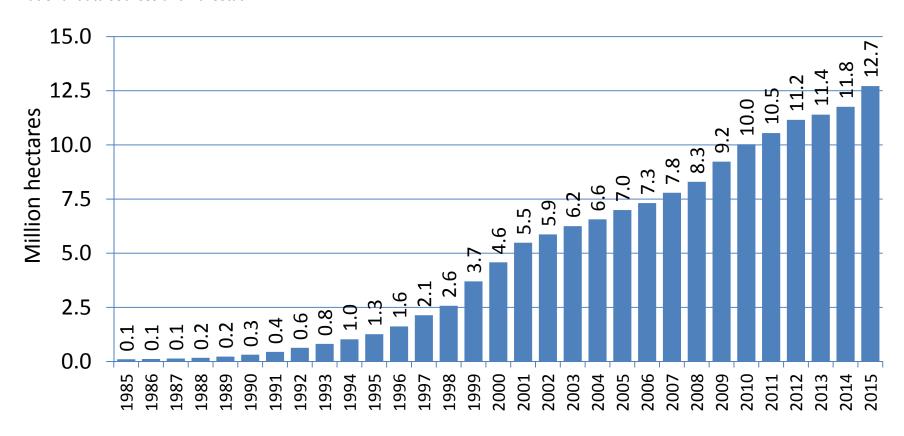




# Development of the organic agricultural land in Europe 1999-2015

#### **Europe: Development of organic agricultural land 1985-2015**

Source: Lampkin, Nic, FiBL-AMI surveys 2006-2017, and OrganicDataNetwork surveys 2013-2015, based on national data sources and Eurostat

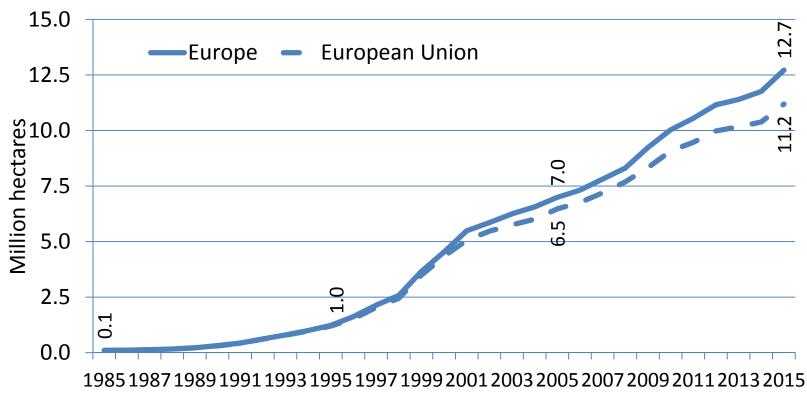




# European Union and Europe: Development of organic farmland 1985 to 2015

#### **Europe and European Union: Development of organic agricultural land 1985-2015**

Source: FiBL-AMI Survey 2017, based on national data sources and Eurostat

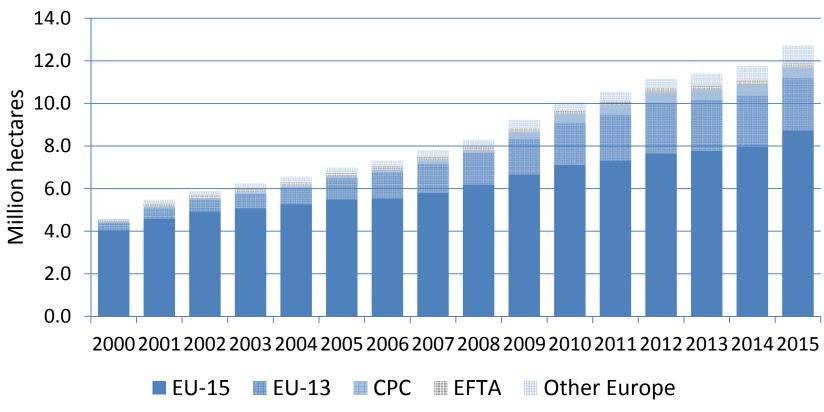




# Europe: Growth of organic agricultural land by country group 2000-2015

#### **Europe: Growth of organic farmland by country group 2000-2015**

Source: Lampkin, Nic, FiBL-AMI surveys 2006-2017, and OrganicDataNetwork surveys 2013-2015, based on national data sources and Eurostat

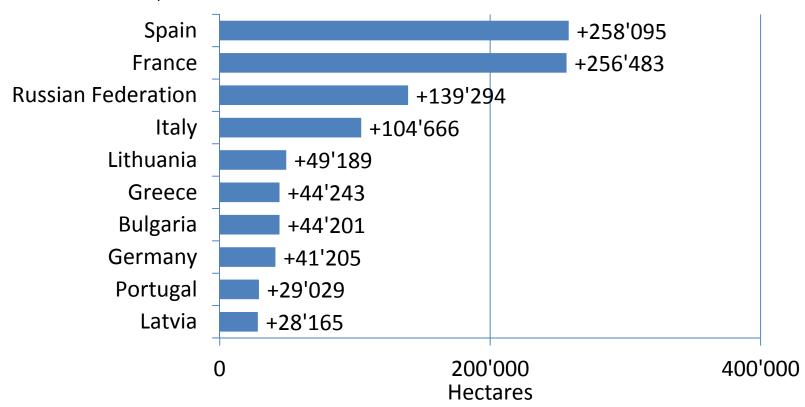




### Europe: The 10 countries with the highest growth of organic agricultural land in 2015

Europe: The 10 countries with the highest growth of organic agricultural land in 2015 (hectares)

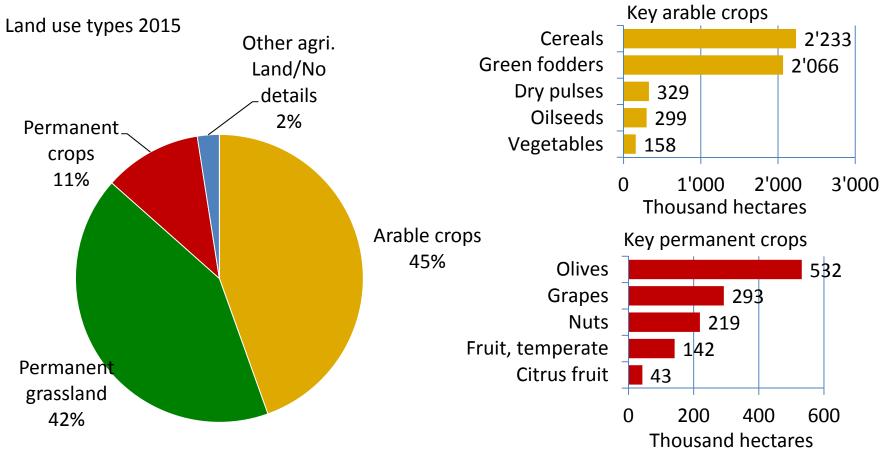
Source: FiBL-AMI survey 2017 based on Eurostat and national data sources





## Europe: Use of organic agricultural land 2015 (total: 12.7 million hectares)

#### **Europe: Use of agricultural organic land 2015**



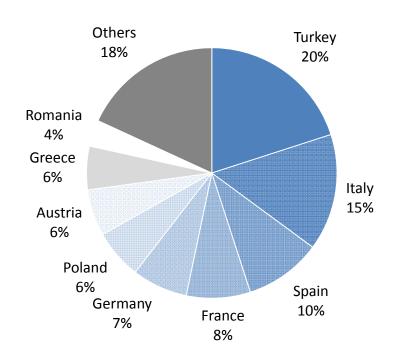


## Figure: Distribution of organic producers and processors in Europe 2015

**Europe: Distribution of organic** 

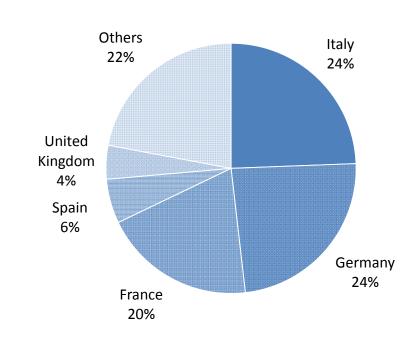
producers 2015

Source: FiBL-AMI survey 2017



**Europe: Distribution of organic** 

processors 2015

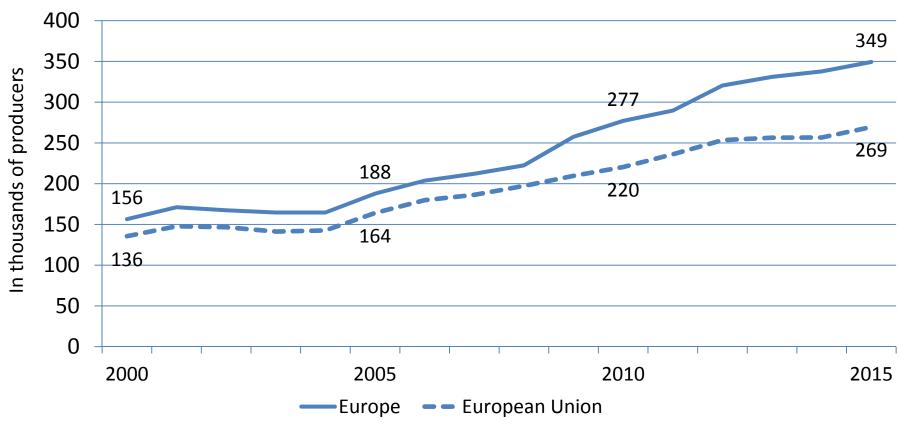




### **Europe: Development of organic producers** 2000 to 2015

#### **Europe and European Union: Development of organic producers 2000-2015**

Source: FiBL-AMI Surveys 2006-2017 based on national data sources and Eurostat





#### **EUROPE: ORGANIC RETAIL SALES 2015**



The European Union (27.1 billion €) is the second largest single market after the US (36 billion) and China.

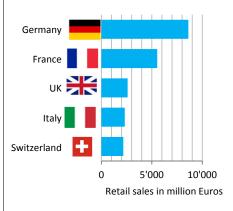
By region, North America has the lead (38.5 billion €), followed by Europe (29.8 billion €) and Asia.



Distribution of retail sales value worldwide by country 2015



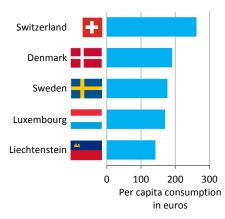
The European countries with the largest markets for organic food are Germany (8.6 billion €), France (5.5 billion €), the UK (2.6 billion €), and Italy (2.3 billion €).



The countries with the largest markets for organic food 2015



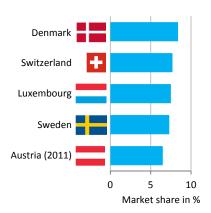
Switzerland has the highest per capita consumption of organic food worldwide, followed by Denmark and Sweden.



The countries with the highest per capita consumption of organic food 2015



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



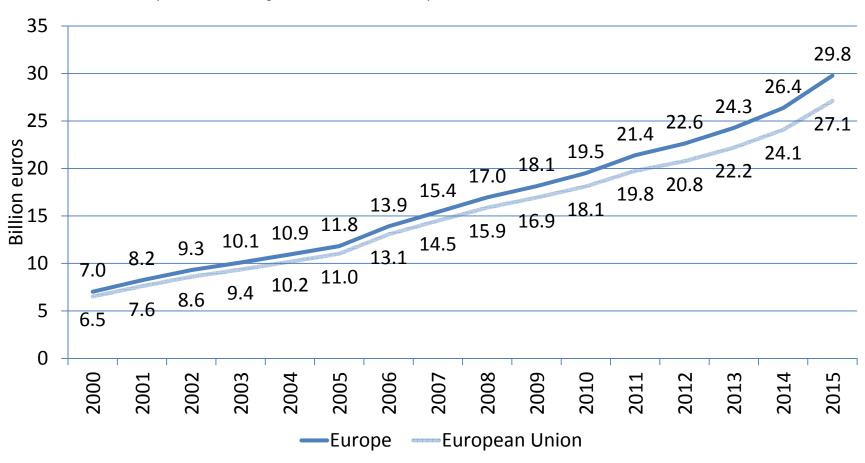
The countries with the highest organic shares of the total market 2015



### **Europe and European Union: Growth of the Organic Market 2004-2015**

#### **Europe and European Union: Market development 2000-2015**

Source: FiBL-AMI Surveys 2006-2017, OrganicDataNetwork Surveys 2013-2015

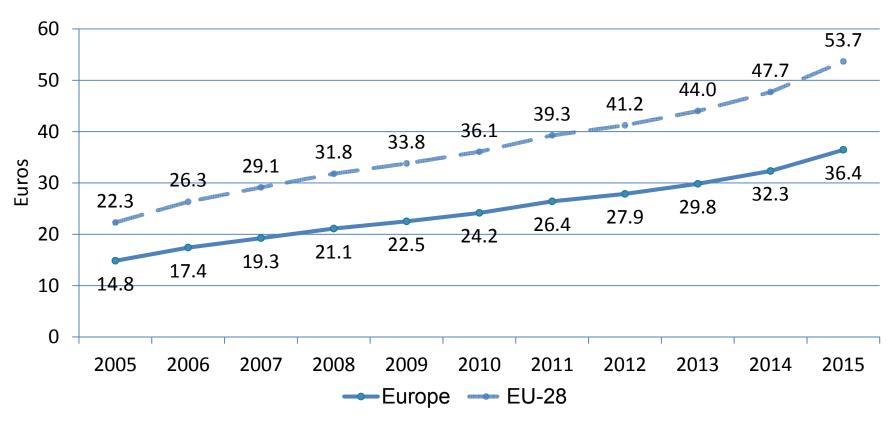




## **Europe and European Union: Growth of per consumption of organic products 2005-2015**

#### **Europe and European Union: Growth of the per capita consumption 2005-2015**

Source: FiBL-AMI surveys 2006-2017, OrganicDataNetwork Surveys 2013-2015

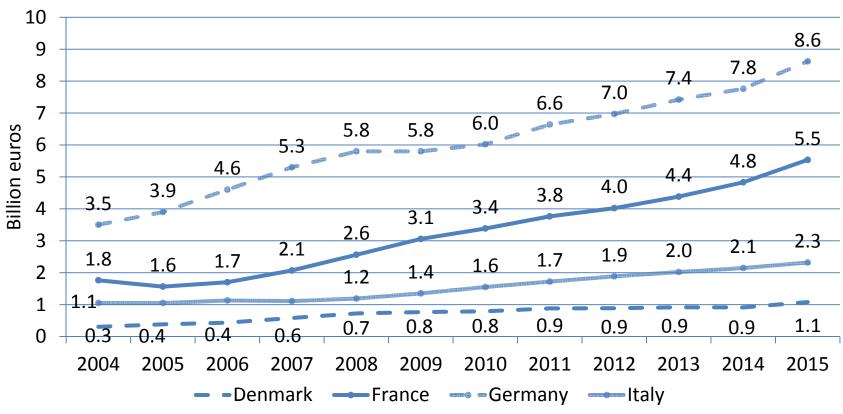




### **European Union: Development of the organic** market in selected European countries 2004-2015

#### **European Union: Market development in selected countries 2004-2015**

Source: AMI, Germany; Agence Bio France, AssoBio, Italy; LF Denmark

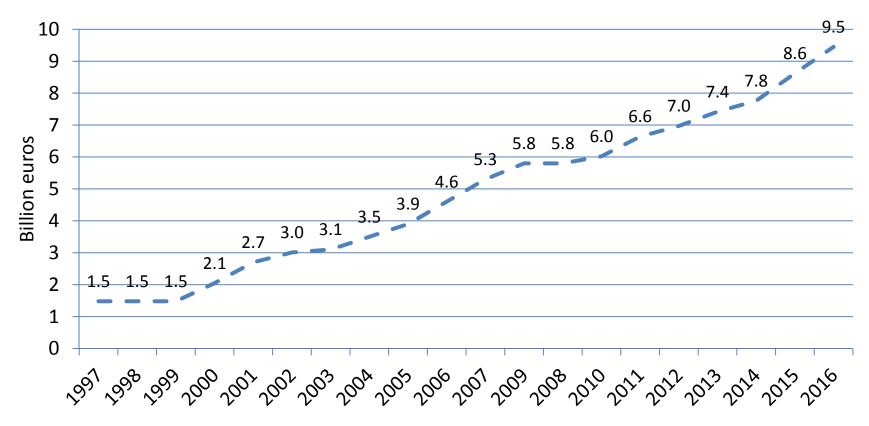




#### Germany

#### **Germany: Market development in selected countries 2004- 2015**

Source: ZMP, AMI, Arbeitskreis Biomarkt

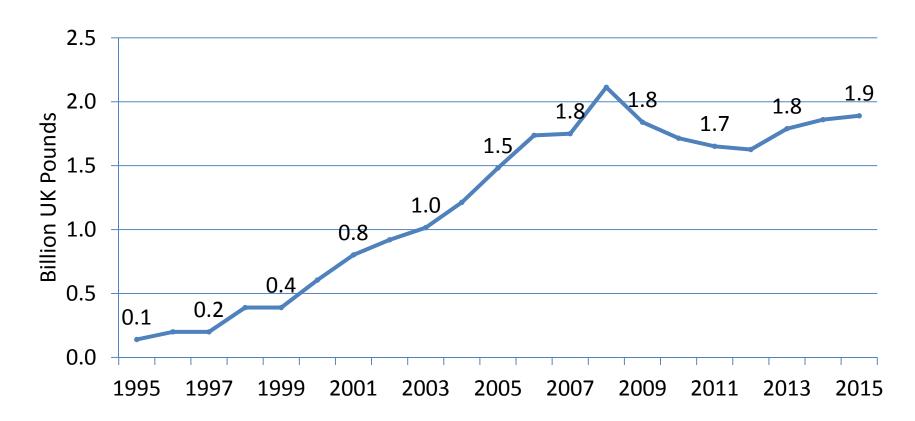




### United Kingdom: Development of the organic market in the UK 1995-2015

#### **United Kingdom: Market development 2004-2015**

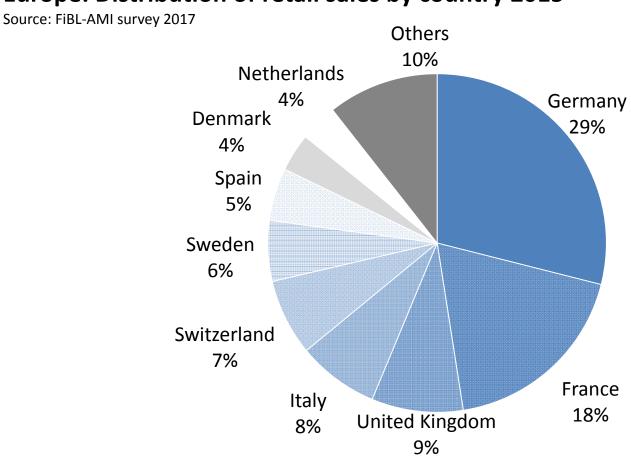
Source: Soil Association, Organic Resarch Centre Elm Farm





## Europe: Distribution of sales of organic food and drink by country 2015 (total: 29.8 billion euros)

#### **Europe: Distribution of retail sales by country 2015**



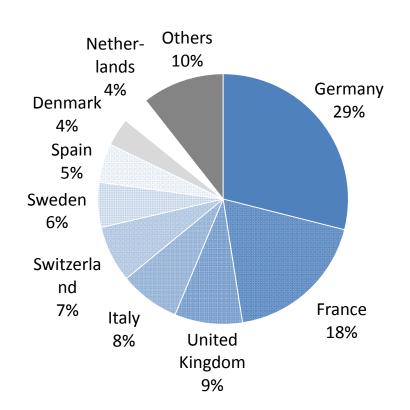


### Figure: Distribution of retail sales in Europe and worldwide

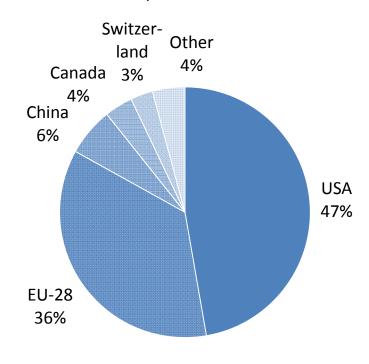
**Europe: Distribution of retail sales** 

by country 2015

Source: FiBL-AMI survey 2017



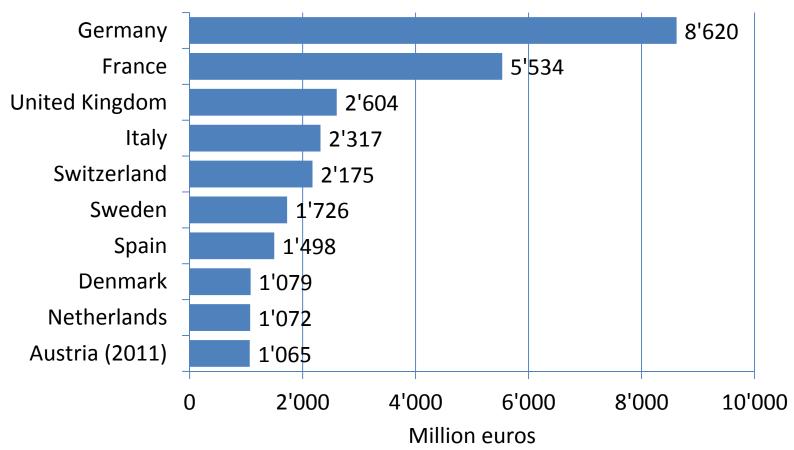
World: distribution of retail sales by single market 2015





### The European market for organic food and drink: The countries with the highest sales 2015

**Europe: Organic retail sales value by country 2015** 

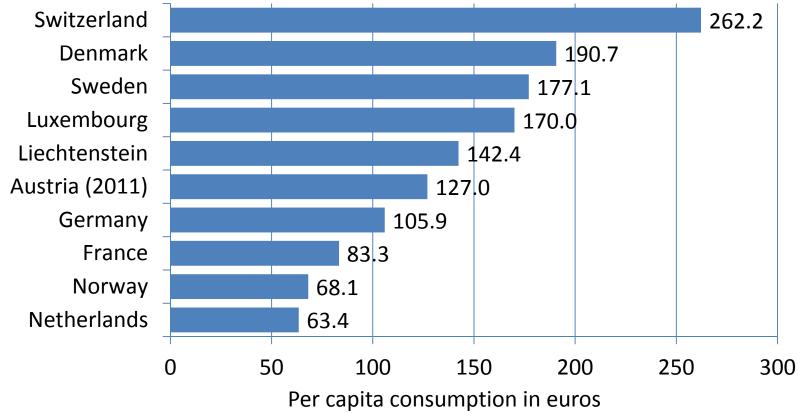




#### Europe: The countries with the highest percapita consumption 2015

**Europe: The countries with the highest per capita consumption 2015** 

Source: FiBL-AMI Survey 2017

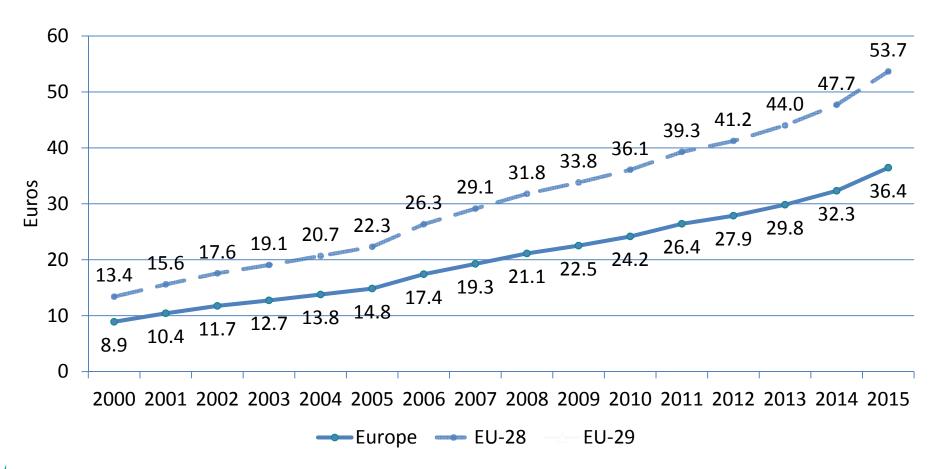




### **Europe: Growth of per capita consumption 2005-2015**

**Europe and European Union: Growth of the per capita consumption 2000-2015** 

Source: FiBL-AMI Surveys 2002-2017,

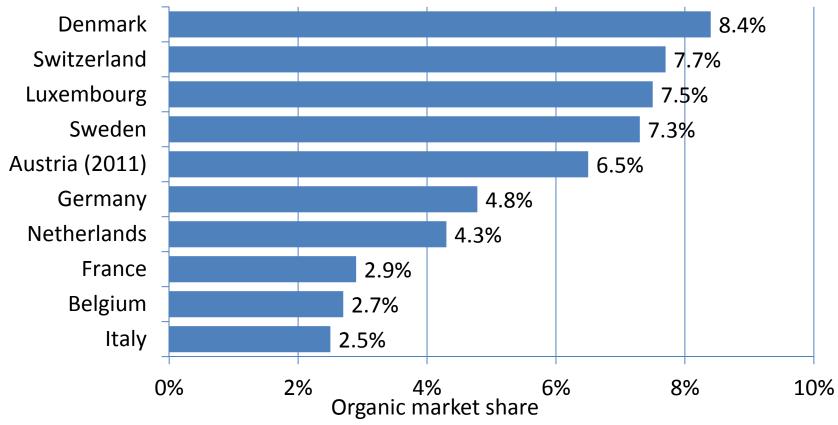




## Europe: The ten countries with the highest organic shares of the total market 2015

**Europe: The countries with the highest organic shares of the total market 2015** 

Source: FiBL-AMI Survey 2017





#### Articles about Europe in the 2017 Edition of "The World of Organic Agriculture"

- Organic Farming in Europe
   Helga Willer, Stephen Meredith, Yulia Barabanova, Bram
   Moeskops, and Matthias Stolze
- Organic Farming and Market Development in Europe and the European Union
   Helga Willer, Diana Schaack and Julia Lernoud



## Latin America/Caribbean: Organic agricultural land by country 2015





#### Latin America: Key figures 2015

- In Latin America, more than 450'000 producers managed
  6.7 million hectares of agricultural land organically in
  2015.
- > This constitutes 13 percent of the world's organic land and 0.9 percent of the regions agricultural land.
- The leading countries are Argentina (3.1 million hectares), Uruguay (1.3 million hectares), and Brazil (0.75 million hectares).
- The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (12.5 percent), Uruguay (9 percent), and French Guiana (9 percent).



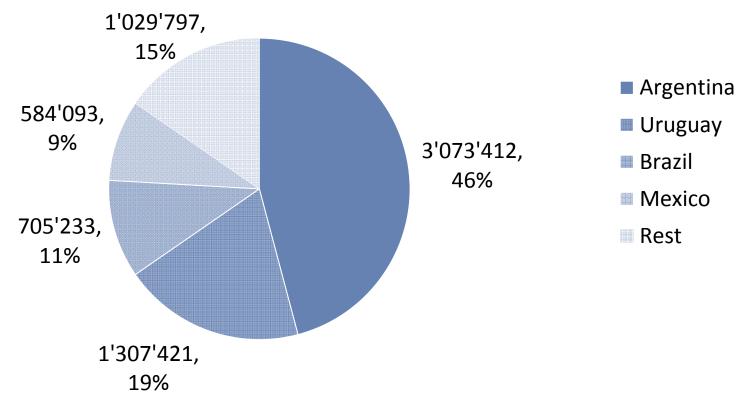
#### Latin America: Key figures 2015

- Most organic products from Latin American countries are sold on the European, North American or Japanese markets. Popular goods are especially those that cannot be produced in those regions, as well as off-season products.
- Many Latin American countries remain important exporters of organic products such as bananas, cocoa and coffee; in countries such as Argentina and Uruguay, temperate fruit and meat are key export commodities. At the same time, domestic markets are trending positively in the region.
- Important crops are tropical fruits, grains and cereals, coffee, cocoa, sugar, and meats. Most organic food sales in the domestic markets of the countries occur in major cities.



## Latin America/Caribbean: Distribution of organic agricultural land by country 2015

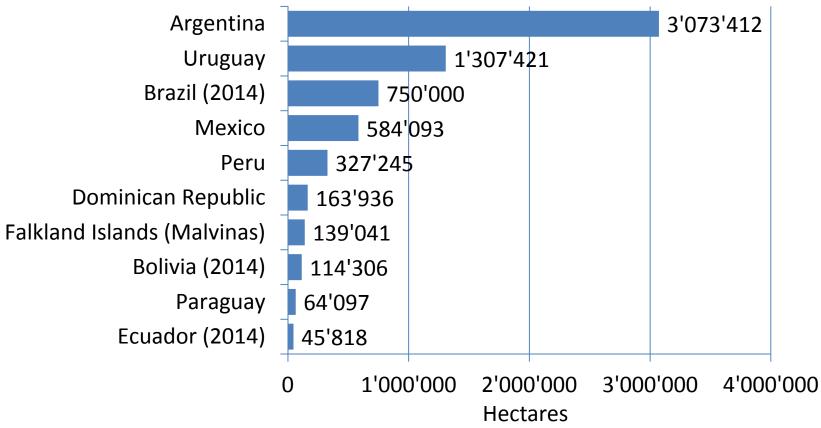
Latin America/Caribbean: Distribution of organic agricultural land by country 2015 (total: 6.7 million hectares)





## Latin America and Caribbean: The ten countries with the largest organic areas 2015

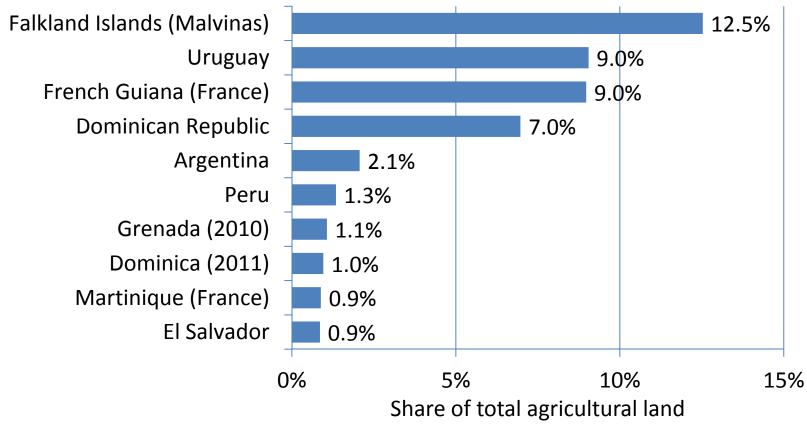
Latin America and Caribbean: The ten countries with the largest organic area 2015





### Latin America: The ten countries with the highest organic share of total agricultural land 2015

Latin America and Caribbean: The countries with the highest organic share of total agricultural land 2015

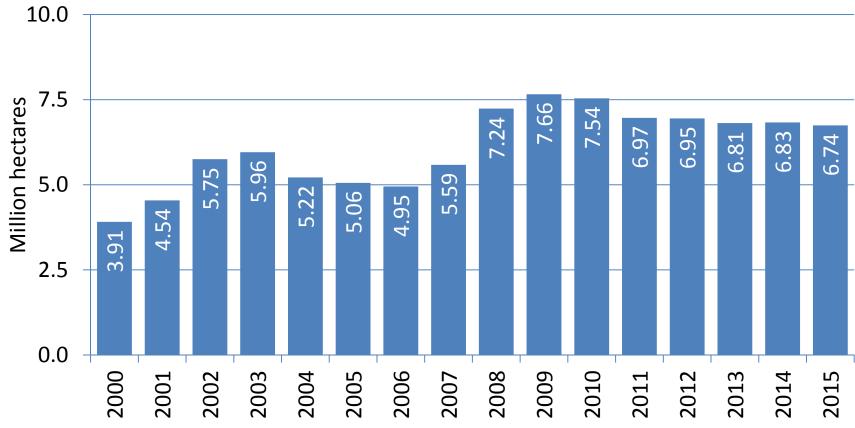




## Latin America: Development of organically managed agricultural land 2000-2015

Latin America and Caribbean: Development of organic agricultural land 2000 to 2015

Source: FiBL-IFOAM-SOEL 2002-2017

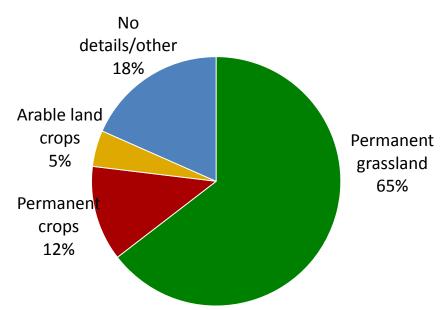


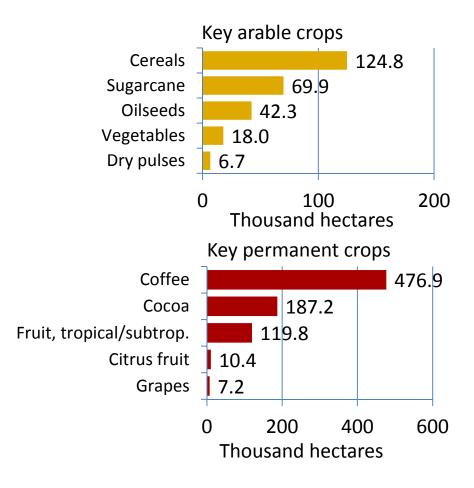
## Latin America: Use of organic agricultural land 2015 (total: 6.7 million hectares)

#### Latin America and Caribbean: Use of agricultural organic land 2015

Source: FiBL survey 2017; based on information from the private sector, certifiers, and governments.

#### Land use types 2015







# Articles about Latin America and the Caribbean in the 2017 edition of "The World of Organic Agriculture"

Latin America and the Caribbean
 Patricia Flores Escudero



## North America: Organic agricultural land by country 2015





Source: USDA and COTA 2017

### Organic Agriculture in North America: Key figures 2015

- In North America, 3 million hectares are managed organically, of these are two million in the United States and more than 0.9 million in Canada.
- This represents 0.7 percent of the total agricultural area in the region and 6 percent of the world's organic agricultural land.
- In 2015, the organic market continued to grow in North America, reaching 39 billion euros. In Canada, the organic market grew by over 9 percent in 2015, and in the United States the organic market grew by 11 percent. The United States is the largest single organic market in the world, and North America continues to be the continent with the largest organic market.

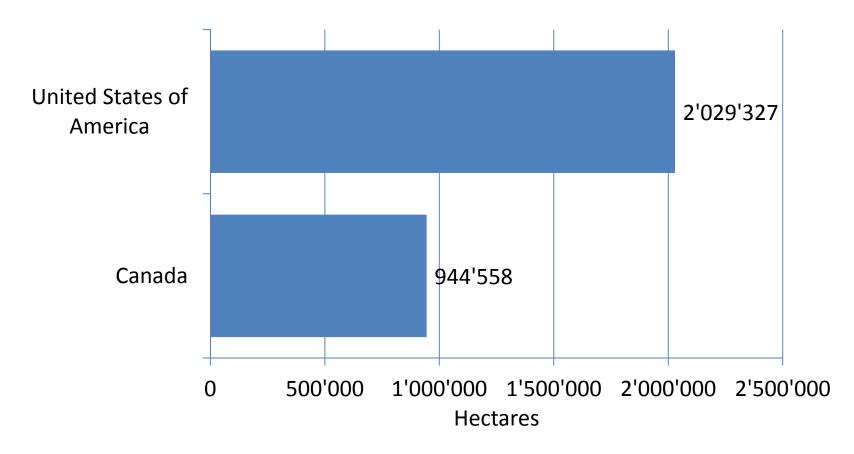


Source: USDA and COTA 2017

#### North America: Organic agricultural land 2015

#### North America: Organic agriculture area 2015

Source: COTA and USDA, 2016



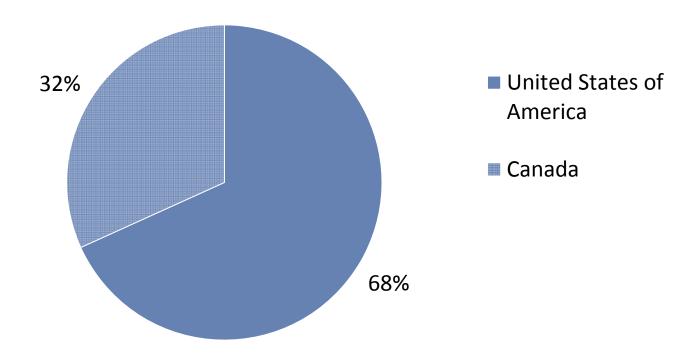


## North America: Distribution of organic agricultural land by country 2015

North America: Distribution of organic agricultural land by

country 2015 (Total: 3 million hectares)

Source: COTA and USDA

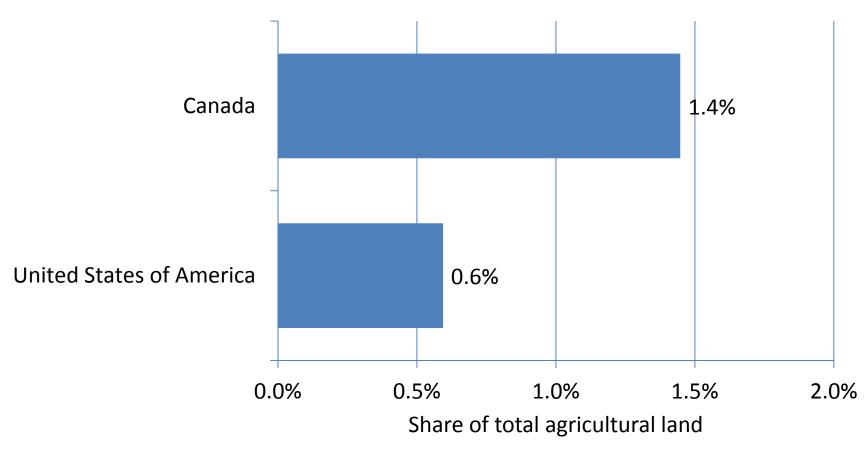




### North America: Shares of organic agricultural land 2015

#### North America: Organic share of total agricultural land 2015

Source: COTA and USDA, 2016

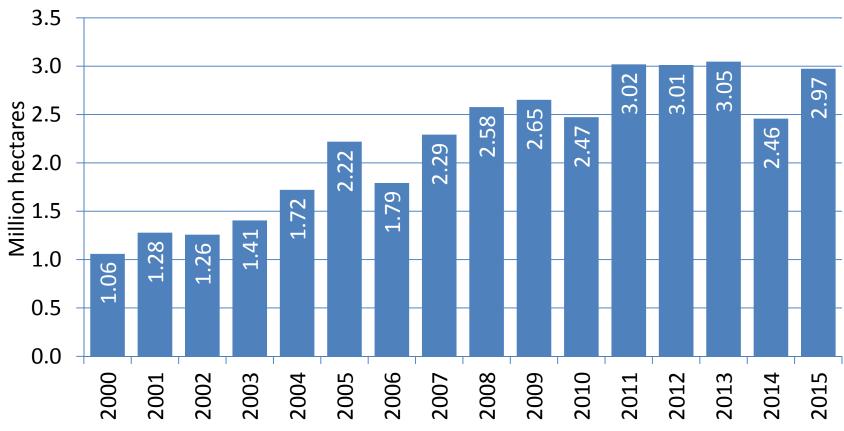




## North America: Development of organic agricultural land 2000-2015

North America: Development of organic agricultural land 2000-2015

Source: COG-COTA and USDA, 2001-2016



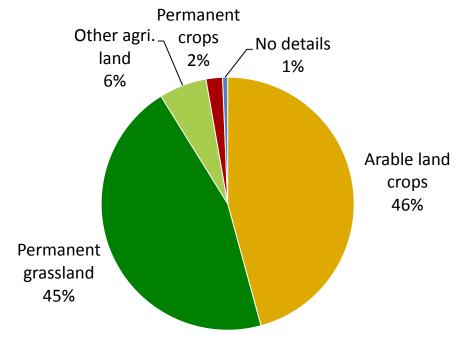


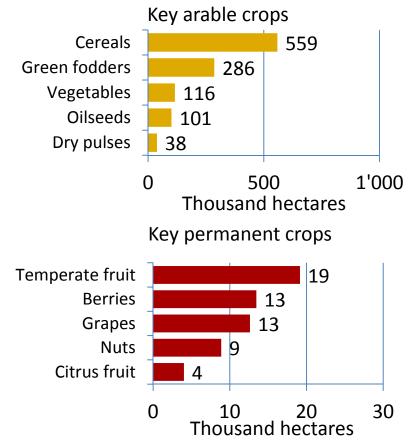
## North America: Use of organic agricultural land 2015 (total: 3 million hectares)

#### North America: Land use in organic

**agriculture 2015**Source: COTA and USDA, 2016

Land use types 2015





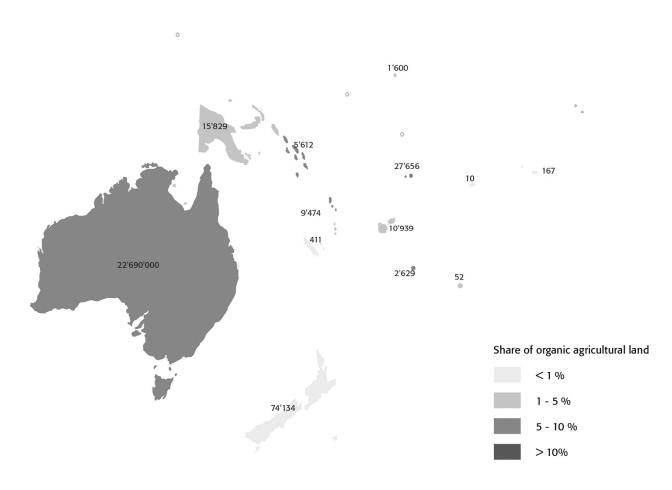


### Articles about North America in the 2017 Edition of "The World of Organic Agriculture"

- Organic Continues to Set Records in the United States
  Barbara Fitch Haumann
- Canada
  Marie-Eve Levert and Jill Guerra



### Oceania: Organic agricultural land by country 2015





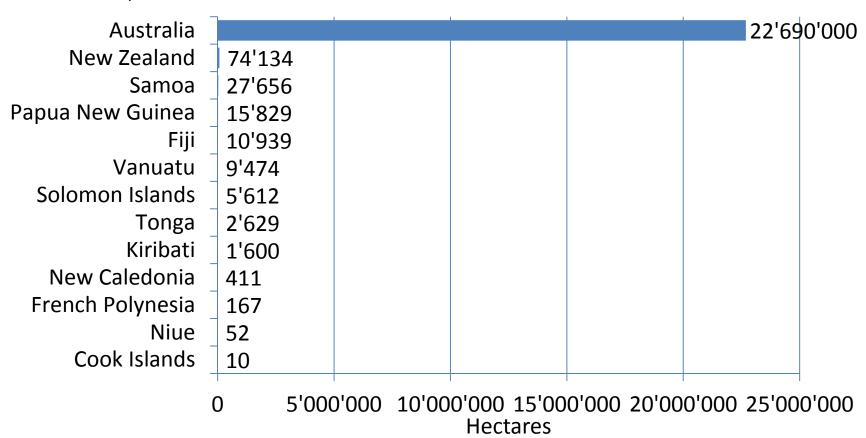
### Organic agriculture in Oceania: Key figures 2015

- > This region includes Australia, New Zealand, and the Pacific Islands.
- Altogether, there are over 22'000 producers, managing 22.8 million hectares.
- > This constitutes 5.6 percent of the agricultural land in the area and almost 45 percent of the world's organic land.
- Ninety-nine percent of the organic land in the region is in Australia (22.7 million hectares, 97 percent of which is estimated to be extensive grazing land), followed by New Zealand (74'134 hectares), and Samoa (27'656 hectares).
- The highest shares of all agricultural land are in Samoa (9.8 percent), followed by Tonga (8 percent), Australia (5.6 percent), and Solomon Islands (5.2 percent).



#### Oceania: Organic agricultural land 2015

#### Oceania: Organic agricultural land by country 2015

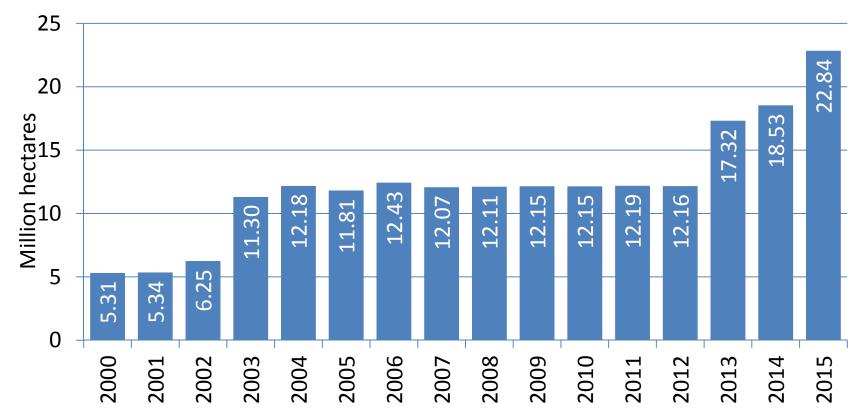




### Oceania: Development of organic agricultural land 2000-2015

Oceania: Development of organic agricultural land 2000-2015

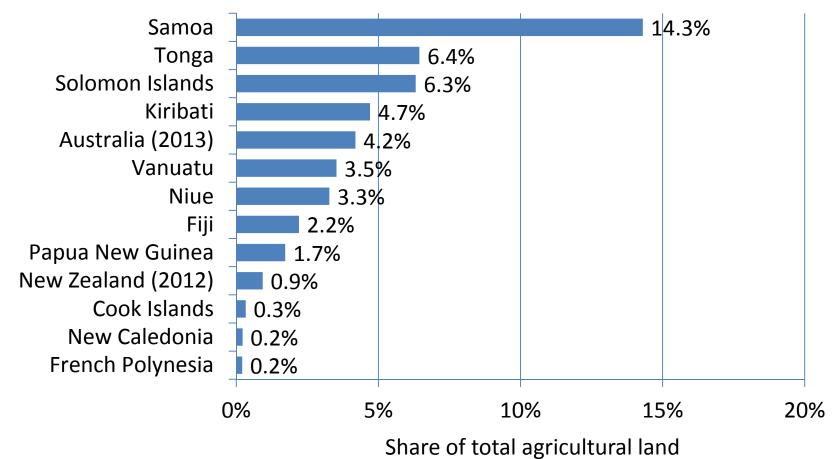
Source: FiBL-IFOAM-SOEL 2002-2017





#### Oceania: Shares of organic agricultural land 2015

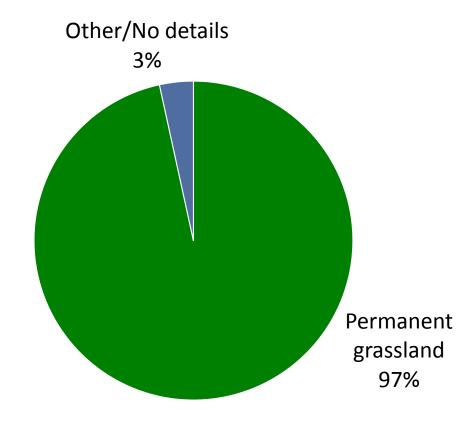
#### Oceania: Organic share of organic agricultural land 2015





## Oceania: Use of organic agricultural land 2015 (total: 22.8 million hectares)

Oceania: Use of organic agricultural land 2015





#### Articles about Oceania in the 2017 Edition of "The World of Organic Agriculture"

- Australia
  Andrew Lawson, Andrew Monk and Amy Cosby
- The Pacific IslandsKaren Mapusua



#### References and data sources

- FiBL\* and IFOAM\*\* (2017): Data on organic agriculture world-wide. In: FiBL& IFOAM (2017): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- > FiBL\*, AMI\*\*\* and IFOAM\*\*: Organic market data. In: FiBL& IFOAM (2017): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- Willer, Helga and Julia Lernoud (2017): Current Statistics on Organic Agriculture Worldwide: Organic Area, Producers, Markets and Selected Crops. In: FiBL& IFOAM (2017): The World of Organic Agriculture. Statistics and Emerging Trends 2017. Frick and Bonn.
- For detailed data sources by country please check <a href="http://www.organic-world.net/statistics/statistics-data-sources.html?L=2">http://www.organic-world.net/statistics/statistics-data-sources.html?L=2</a>
- \*FiBL= Research Institute of Organic Agriculture, Switzerland;
  \*\*IFOAM = International Federation of Organic Agriculture Movements, Germany;
  \*\*\*AMI = Agricultural Information Company, Germany
- More information at http://www.organic-world.net/yearbook/yearbook-2017.html



#### More information

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