

Organic Agriculture Worldwide

Key results from the global survey on organic agriculture 2010

Research Institute of Organic Agriculture FiBL, Frick, Switzerland, in cooperation with the
International Federation of Organic Agriculture Movements IFOAM
September 2010

Data as published February 2010 in *The World of Organic Agriculture. Statistics and Emerging Trends 2010*
with some data revisions and some updates (if applicable revision date is stated)

For updates check www.organic-world.net

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About this presentation

- › This presentation summarizes the results of the global survey on organic agriculture 2010, carried out by the Research Institute of Organic Agriculture FiBL and the International Federation of Organic Agriculture Movements IFOAM.
- › The results are published in the yearbook 'The World of Agriculture', which contains the tables with the full data tables.
- › Further, more detailed data as well as more graphs are available at www.organic-world.net.
- › More information and background on geographical and other current aspects of organic agriculture are available in the above-mentioned yearbook (see <http://www.organic-world.net/yearbook.html>).

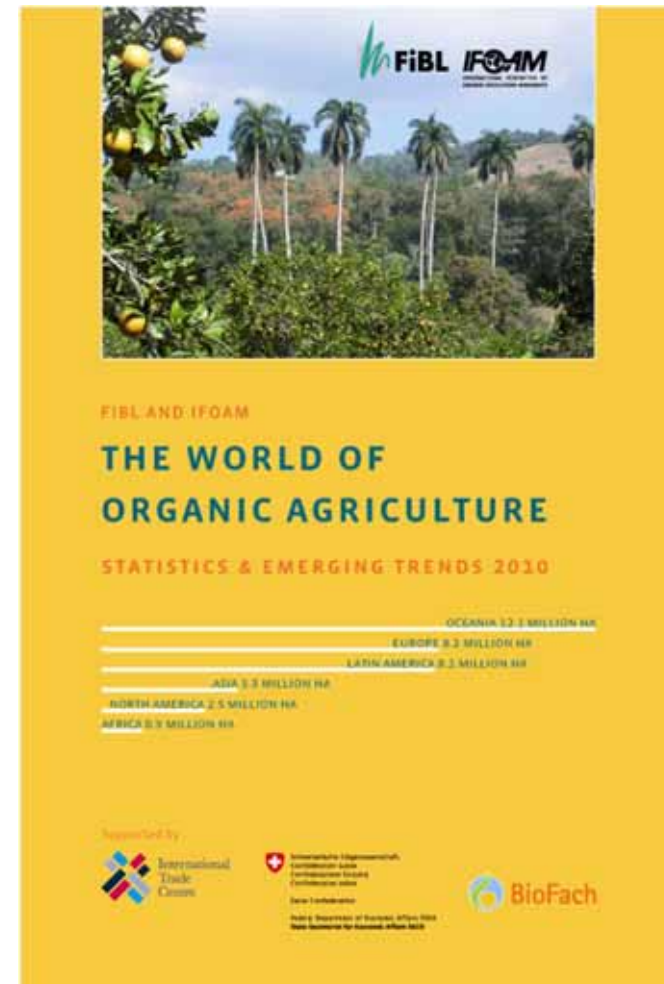
The Global Organic Survey 2010

- › The global organic survey 2010 as well as the production of the yearbook 'The World of Organic Agriculture' was carried out with the support of
- › International Trade Centre, Geneva
- › The Swiss State Secretariat of Economic Affairs SECO, Berne
- › Nürnberg Messe, the organizers of the BioFach Organic Trade Fair
- › Hivos (data collection Africa)



The World of Organic Agriculture 2010

- › The 11th edition of 'The World of Organic Agriculture', was published by IFOAM and FiBL in February 2010.*
- › Contents:
 - › Results of the global organic survey;
 - › Organic agriculture in the geographical regions;
 - › Chapters on the global market, standards and legislations, carbon markets; crops (coffee and cotton), development cooperation, other issues.
- › The book can be ordered via the IFOAM.org and shop.FiBL.org.
- › *Willer, H, and Kilcher, L. (2010) The World of Organic Agriculture. Statistics and Emerging Trends. IFOAM, Bonn, and FiBL, Frick



Website www.organic-world.net

- › Detailed statistics in excel format (in progress)
- › Graphs & Maps
- › Data revisions
- › News and background information



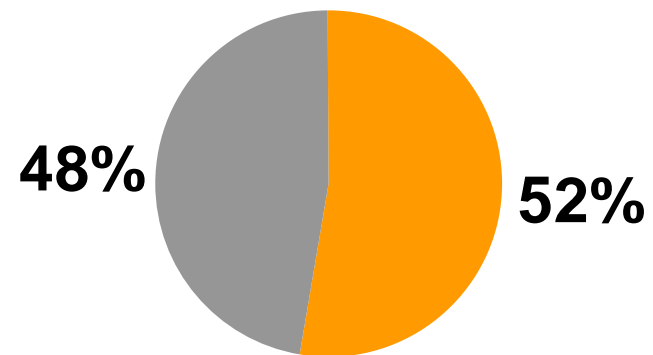
General notes on the data

- › **Data sources:** For data sources see annex to The World of Organic Agriculture 2010.
- › **Countries:** For countries and areas, FiBL and IFOAM used the Standard Country and Area Codes Classifications as defined by the United Nations Statistics division.
- › **Term organic:** In the tables, the term organic refers to the fully converted and in-conversion areas.
- › **Share of total agricultural land:** In some cases the calculation of the shares of organically managed land, based on the Eurostat and FAOSTAT data, might differ from the organic shares obtained from ministries or local experts.
- › **Producers:** Some countries report the number of smallholders, and others only the numbers of companies, projects or grower groups, which may each comprise a number of producers.
- › **Data revisions:** Should data revisions and correction become necessary these will be communicated at the [data revision pages](#) of Organic-World.net.

Definition of organic areas

- › Agricultural land (35 Mio Ha 2008)
 - › Cropland
 - › **Arable land** (cereals, vegetables etc.)
 - › **Permanent crops** (fruit, grapes, olives ...)
 - › **Cropland, no details** (=arable land and permanent crops)
 - › Permanent grassland
 - › Other agricultural land
- › Non-agricultural areas (31.8 Mio ha)
 - › Forest
 - › Aquaculture
 - › Grazing on non-agricultural land
 - › Wild collection/Bee keeping

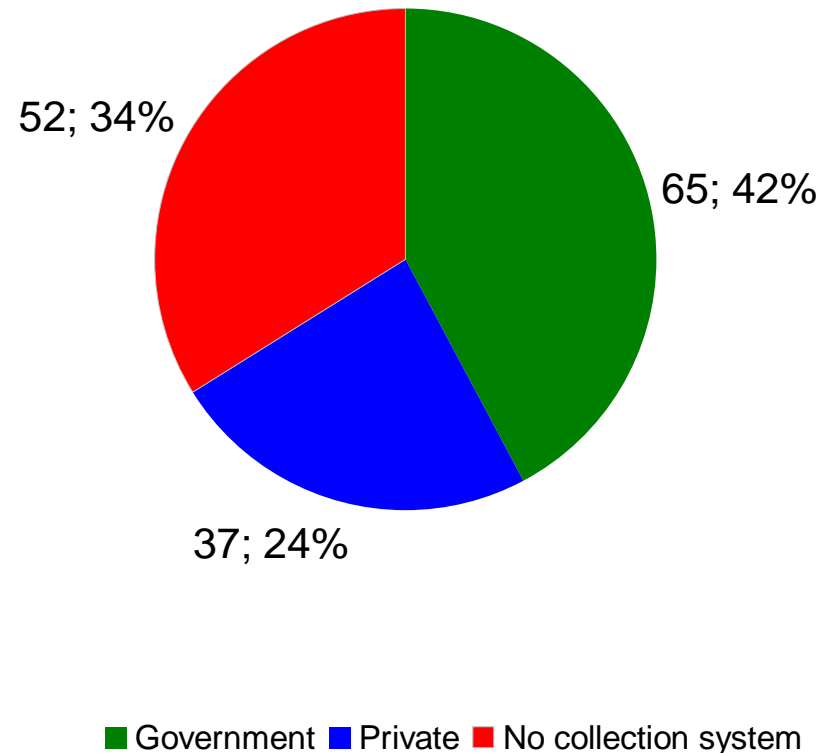
**Distribution of
agricultural and non-
agricultural areas 2008**



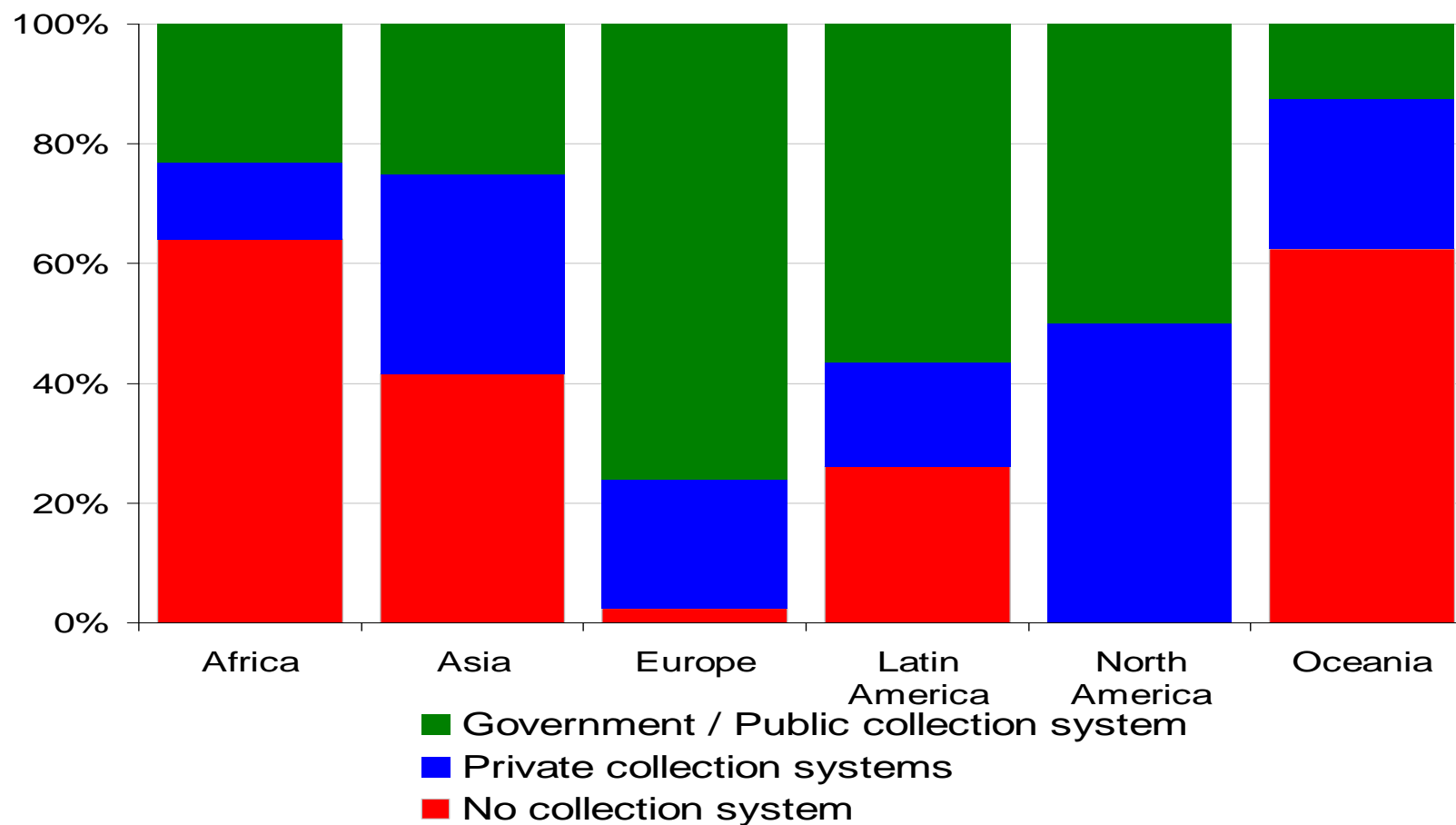
- **Agricultural land**
- **Non agricultural areas**

Organic data collection and processing systems world-wide 2008 for basic data on organic agriculture (total 154 countries with data)

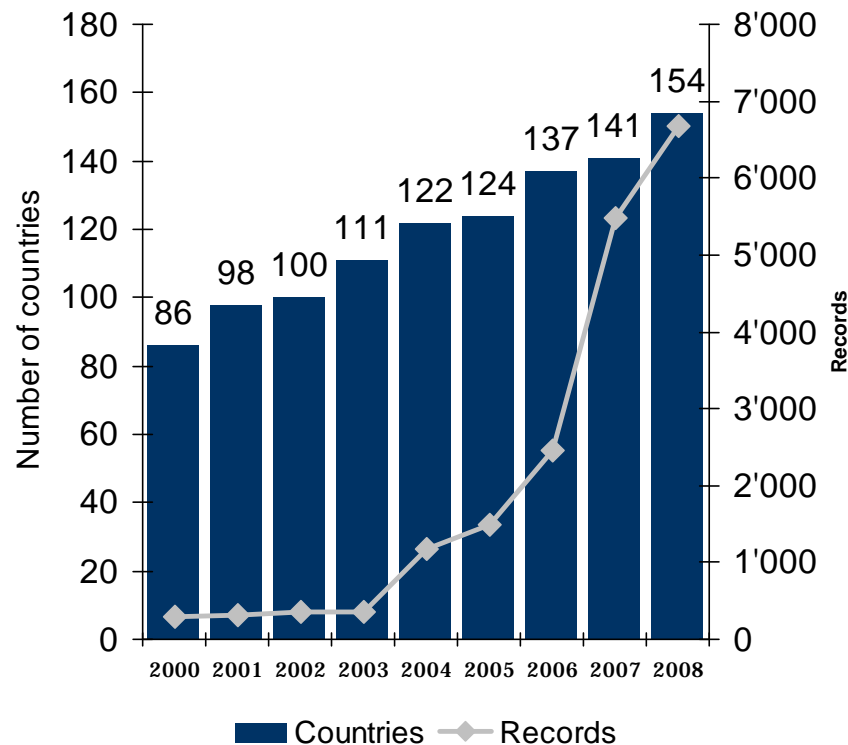
- › Government collection systems (65 countries)
 - › Data from the certifiers
 - › Census/farm structure survey
 - › Direct payments
- › Private collection systems (37 countries)
 - › Data from the certifiers
 - › Company data
- › No collection system (52 countries)
 - › IFOAM and FiBL collect the data from the international certifiers (problems of continuity of data supply, comparability over the years, non-harmonized/non-processed data).
- › Particularly in Africa and in Asia, data collection systems are still underdeveloped.



Data collection systems and data sources for basic data (land, operators) by geographical region 2008



Development of the number of countries with data on organic agriculture



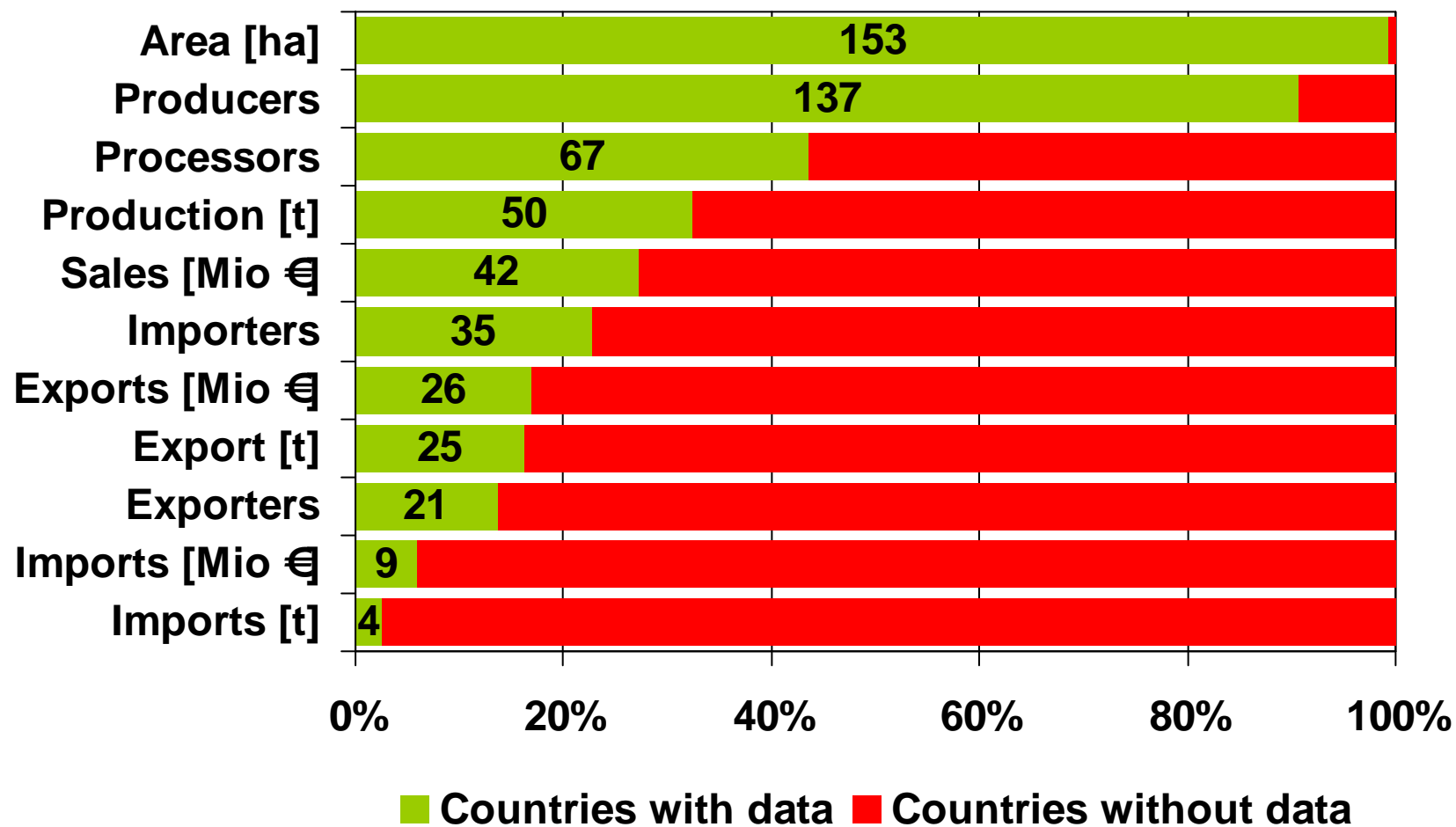
> New countries/areas 2010 survey:

> Burundi, Comoros, Falkland Islands, French Guiana, Guadeloupe, Lesotho, Martinique, Oman, Réunion, Sierra Leone, Somalia, Tajikistan, Zimbabwe

> Countries for which no new data had been received for a longer time:

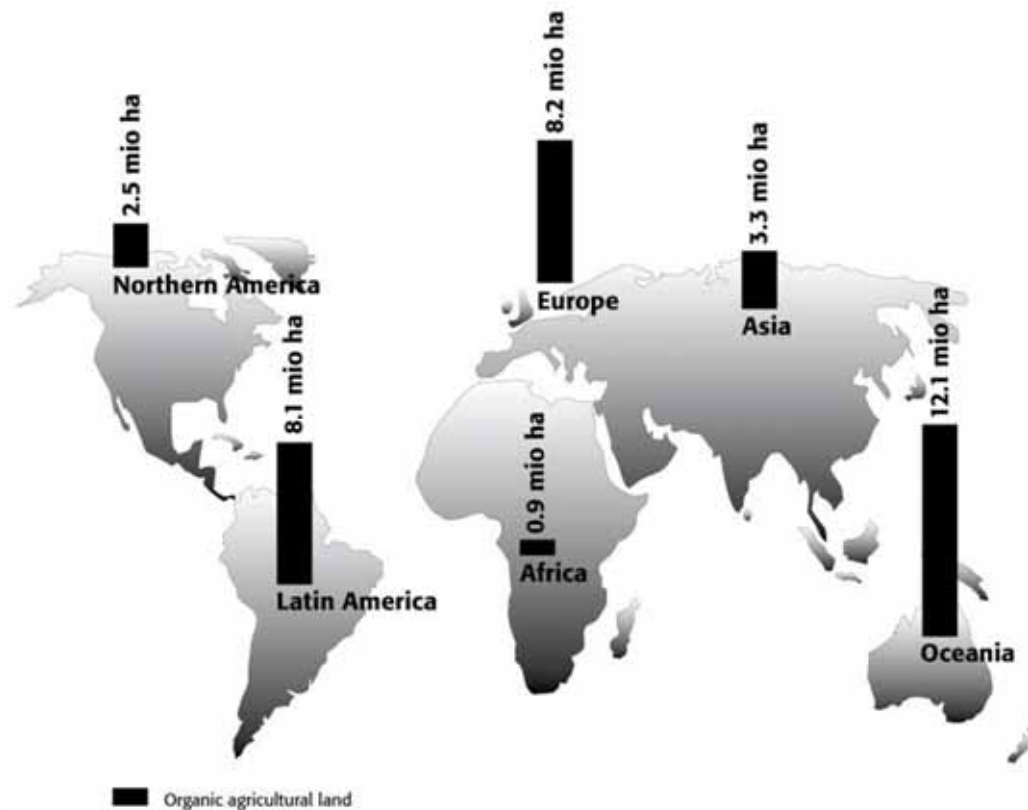
> Belize, Guyana, Malawi, Saudi Arabia

Data availability for key variables 2008; Number of countries/areas per variable; total: 154 countries/areas

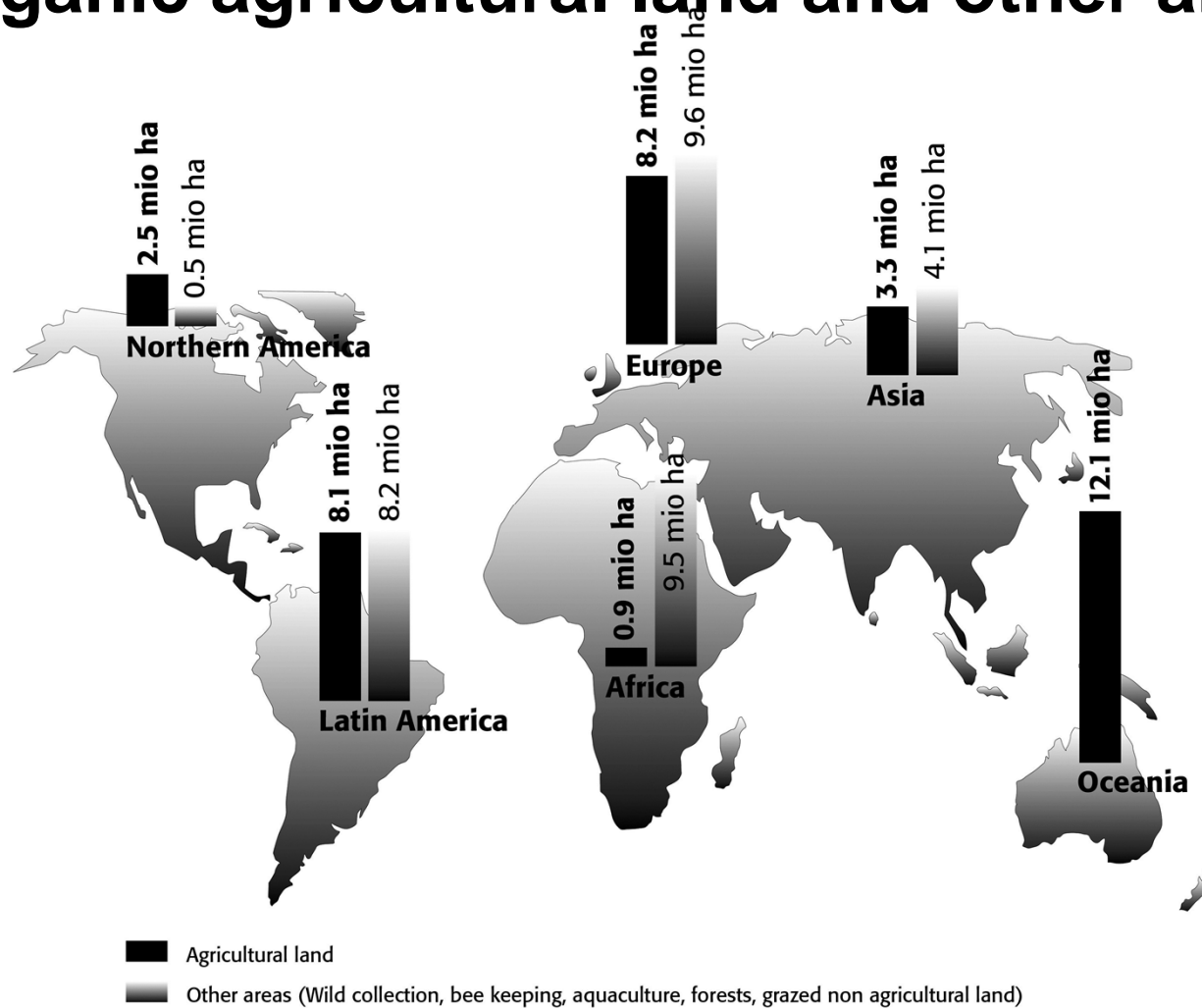


Global Organic Farming Statistics

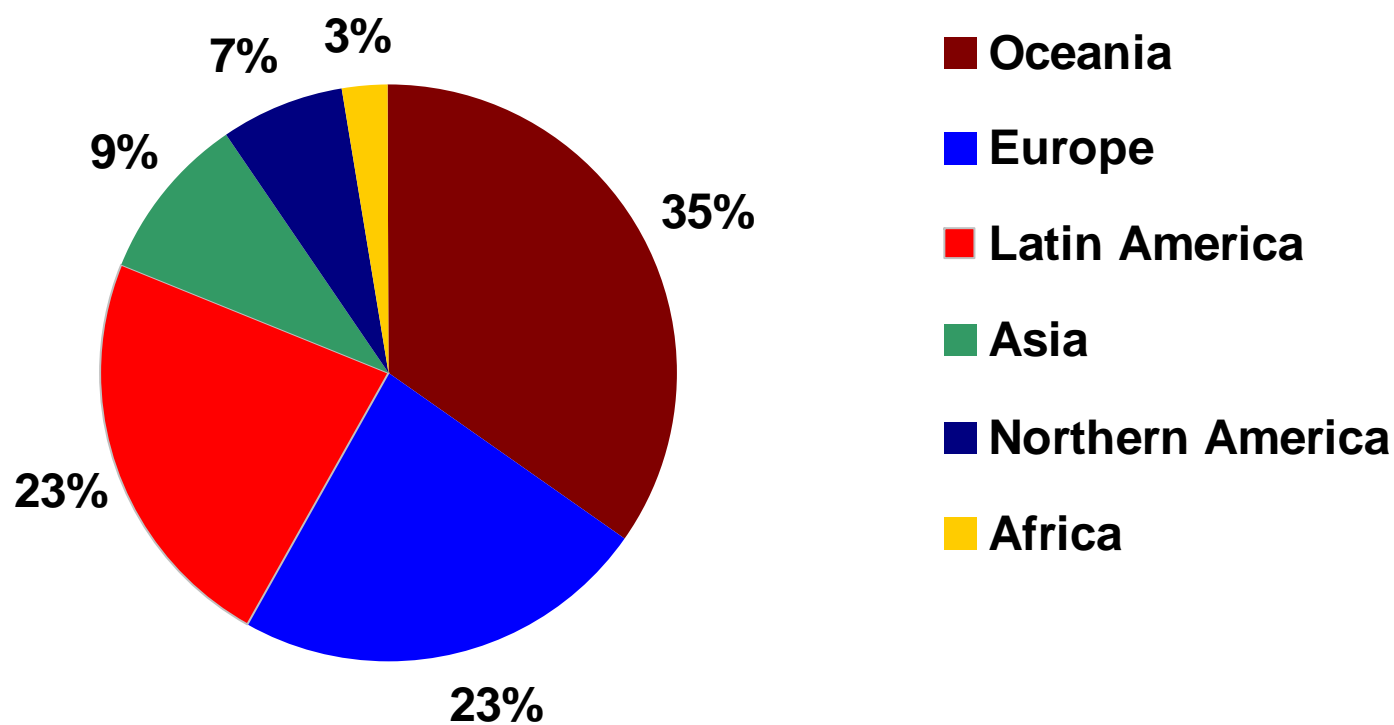
Organic agricultural land in the regions 2008



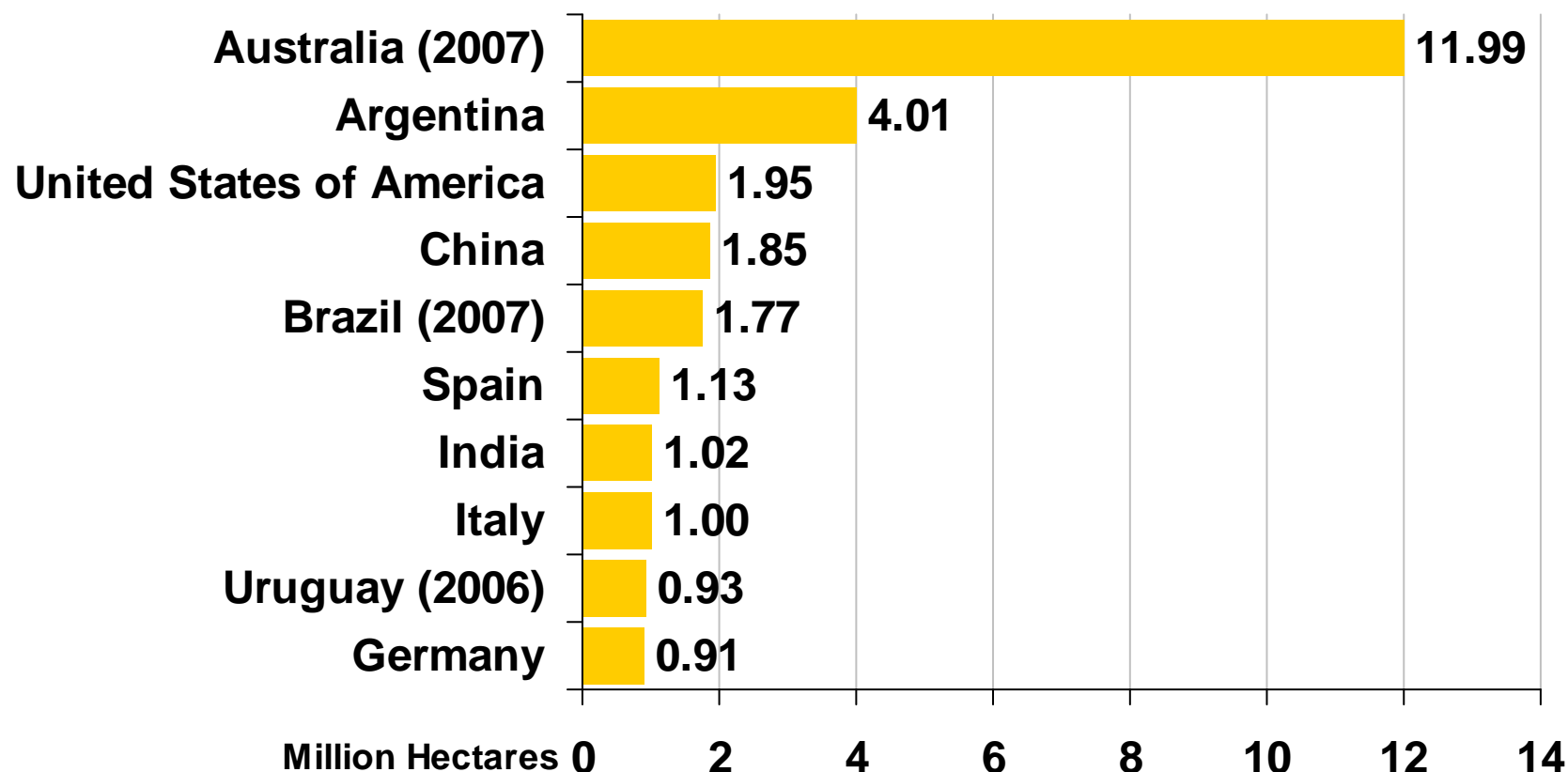
Organic agricultural land and other areas 2008



World: Distribution of organically managed agricultural land by geographical region 2008



World: The ten countries with the most organic agricultural land 2008

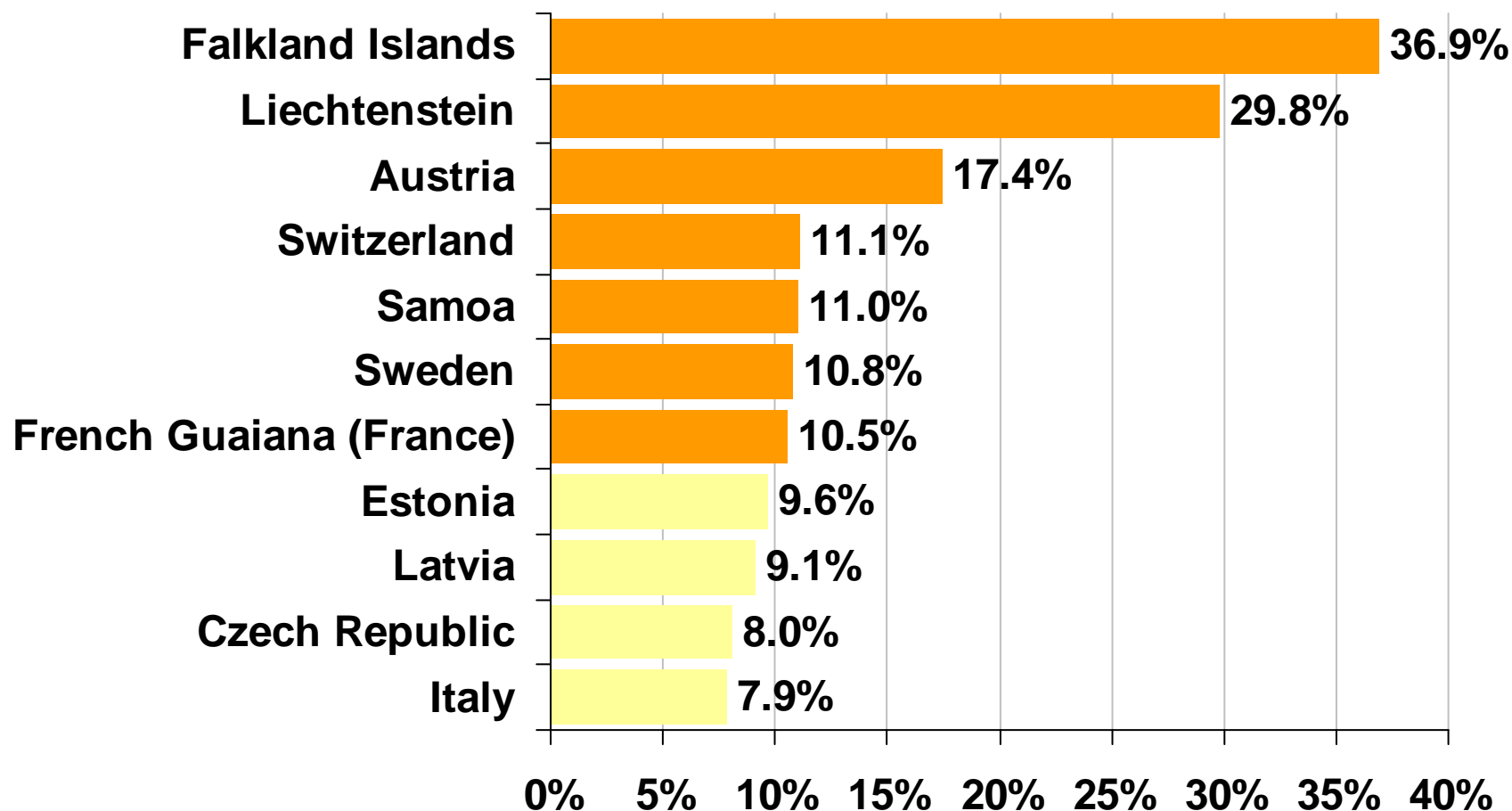


Argentina, US and Uruguay: Only fully converted areas

Source: FiBL/IFOAM Survey 2010, based on data from governments, the private organic sector and certifiers.

Revision date: December 31, 2010

The ten countries/areas with the highest shares of organic agricultural land* 2008



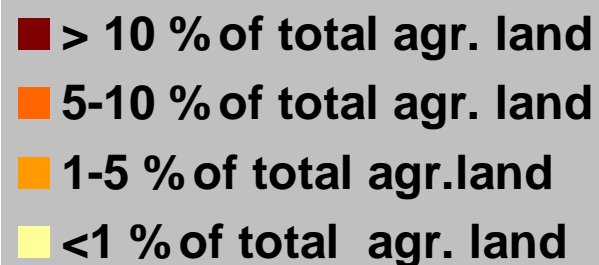
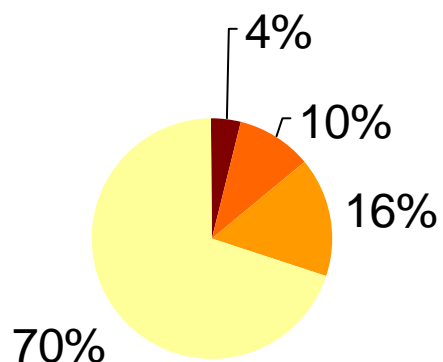
*Including in-conversion areas

Source: FiBL/IFOAM Survey 2010, based on data from governments, private organic sector organisations and certifiers.

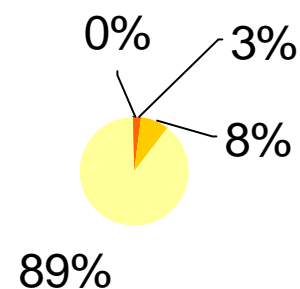
Revision date: December 31, 2010

Distribution of organic shares of the total agricultural areas

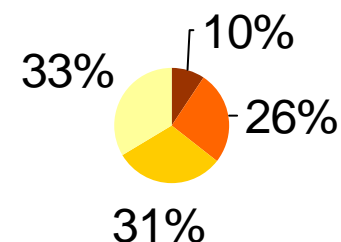
World (154 countries)



Africa (38 countries)



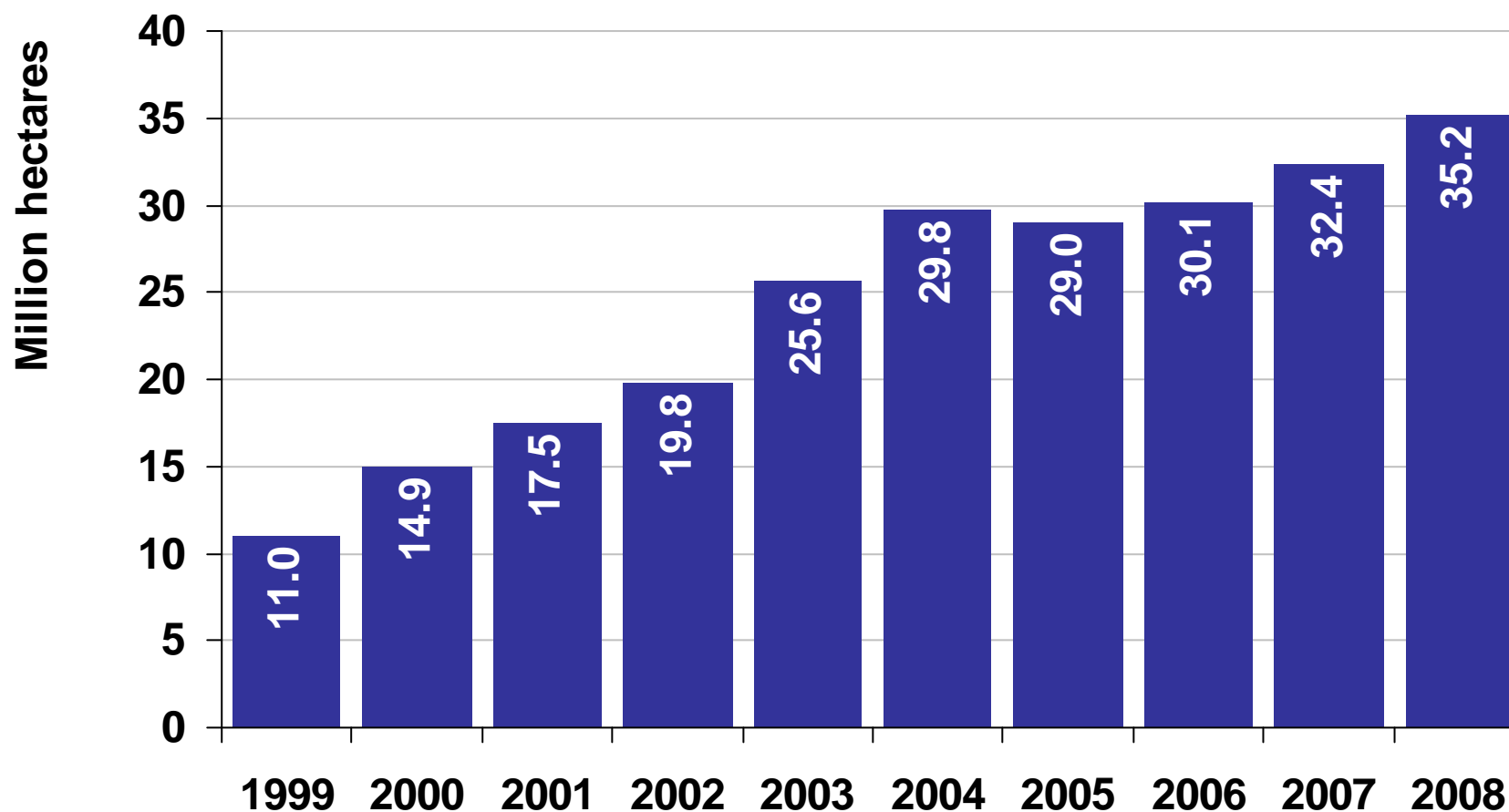
Europe (42 countries)



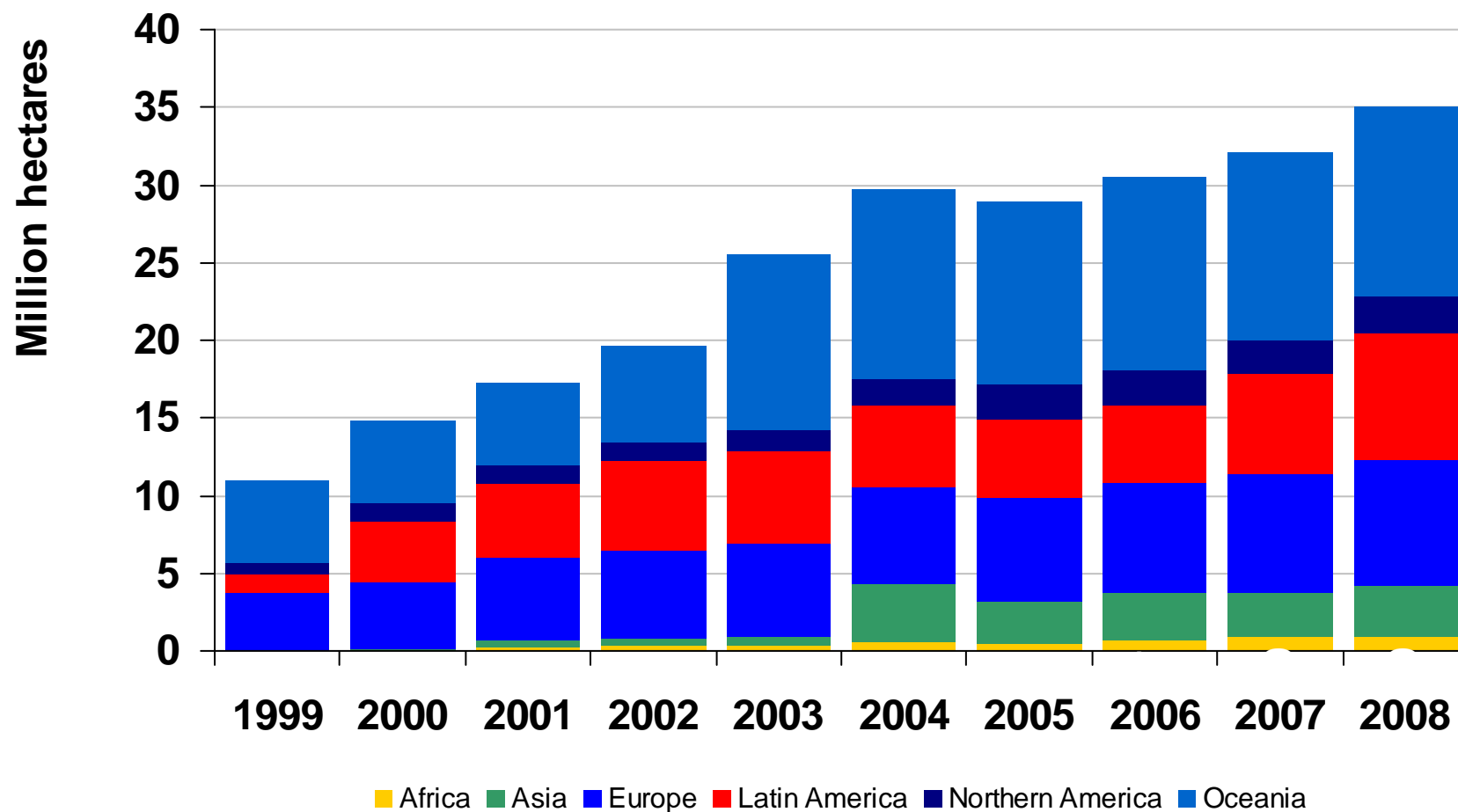
Growth of the organic/in-conversion agricultural land in 2008

- › In 2008, there was growth in all regions.
- › Compared to 2007 there was an increase of almost 3 million hectares =+9 percent
- › The highest increase during 2008
 - › Latin America (1.65 million hectares)
 - › Europe (0.5 million hectares)
- › In 2008, there was an increase of organic agricultural land in 97 countries/areas, a decrease in 23 countries/areas. From 24 countries/areas no new data were received.
- › In 2008, the organic land increased in more than 90 countries.
- › Since 1999, the organic agricultural land has trebled.
- › Notes on the global growth of the organic area
 - › The data are constantly revised as for many countries information is becoming available in retrospect. The graph reflects the status of the revision process per December 2010.
 - › The following should be noted:
 - During 2003 the organic land in Australia increased by 5 million hectares; this explains the major increase in that year.
 - During 2004, the organic area in China increased by more than 2 million hectares; this partly explains the major increase during that year.
 - During 2005, there was a drop of the organic area in China (-1.2 million hectares) and in Australia (-0.36 million hectares), mainly extensively managed grazing areas which are not of major relevance to the organic market. In spite of growth in most countries during that year the global organic land area went down, due to the decrease of grassland under organic management in the countries mentioned above.

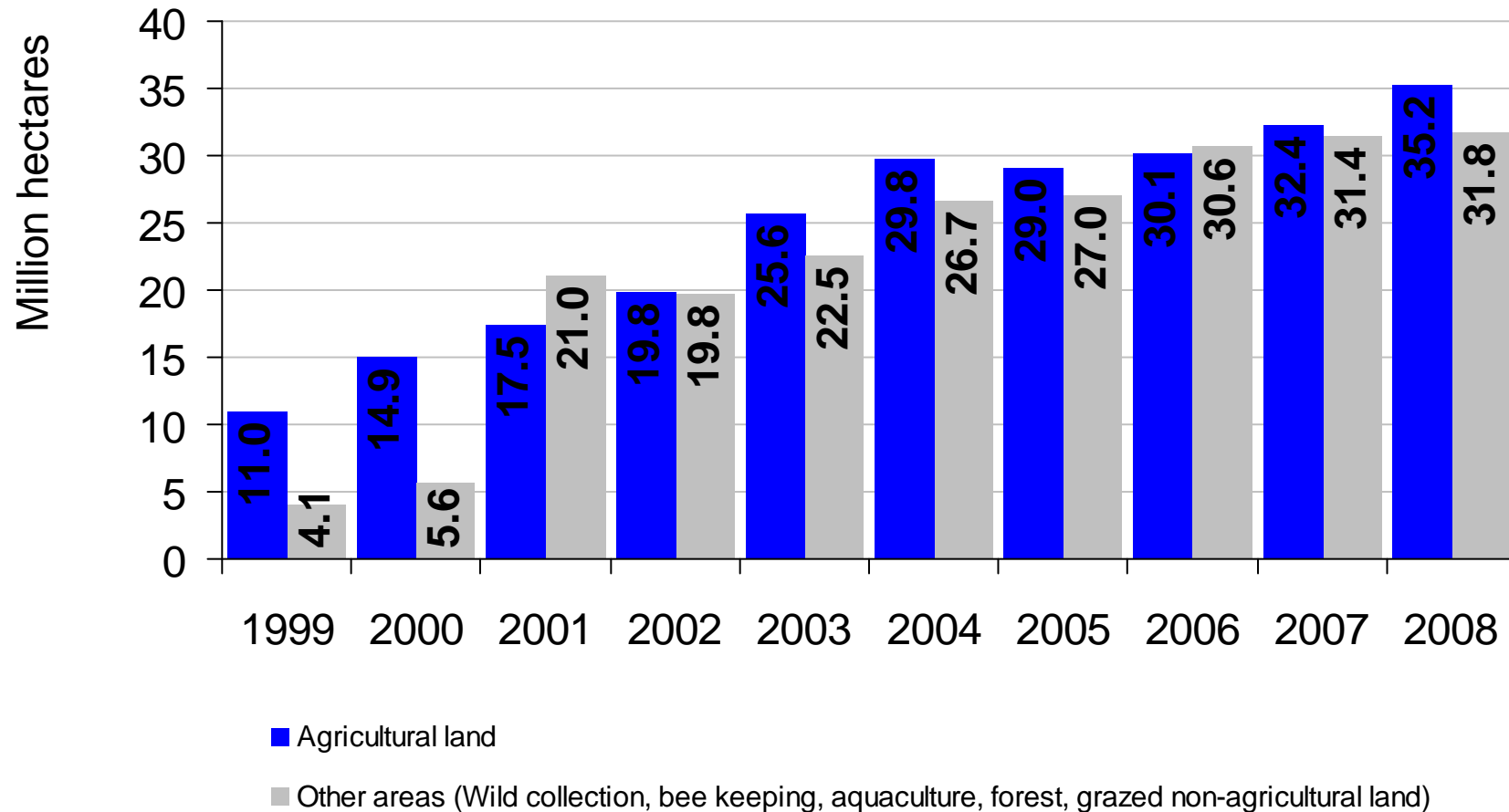
World: Development of organic agricultural land 1999-2008



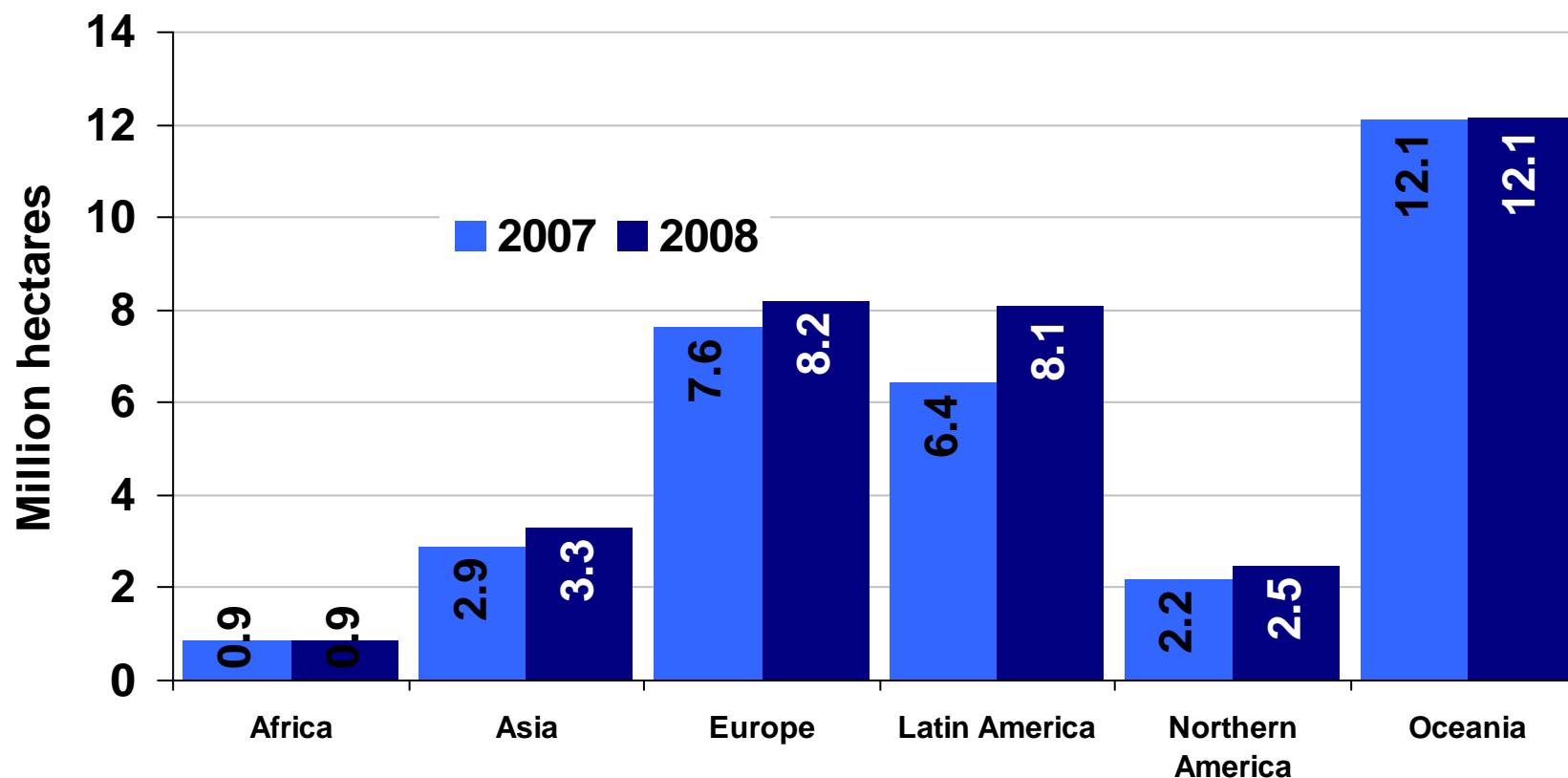
World: Development of organic agricultural land 1999-2008 (Revision date: February 2010)



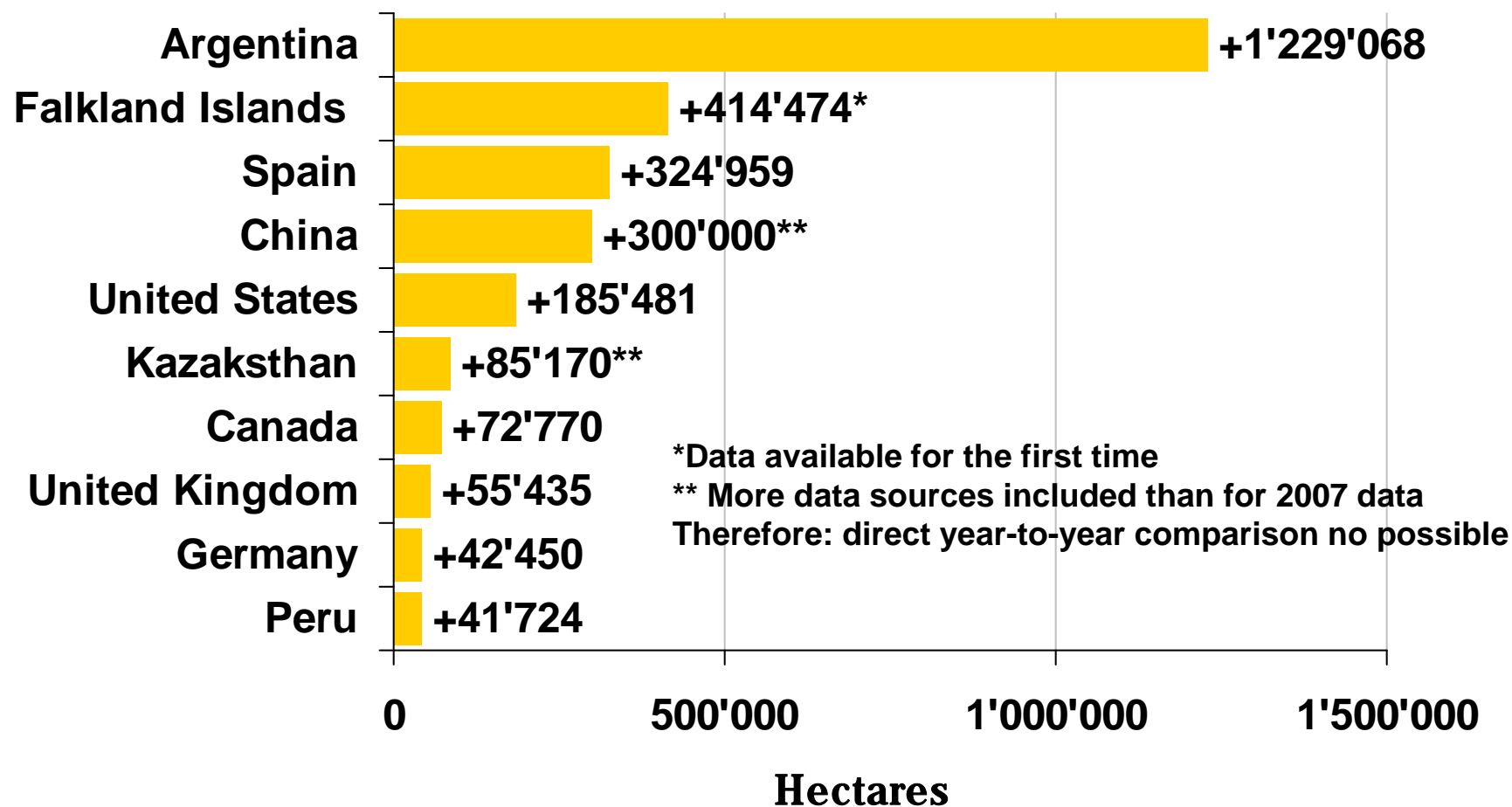
Development of organic agricultural land and other organic areas 1999 to 2008



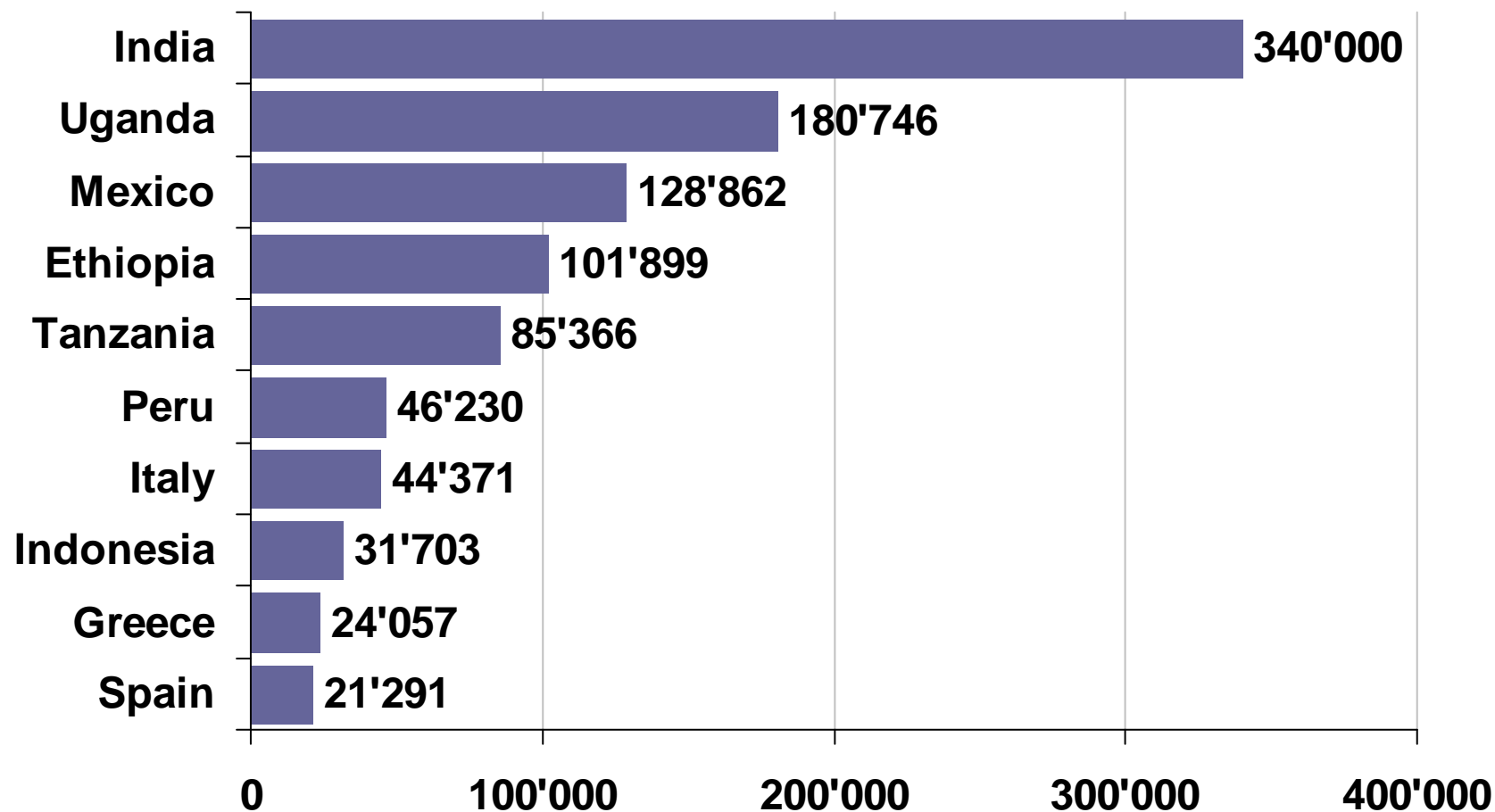
World: Development of organic agricultural land 2007 to 2008 by geographical region



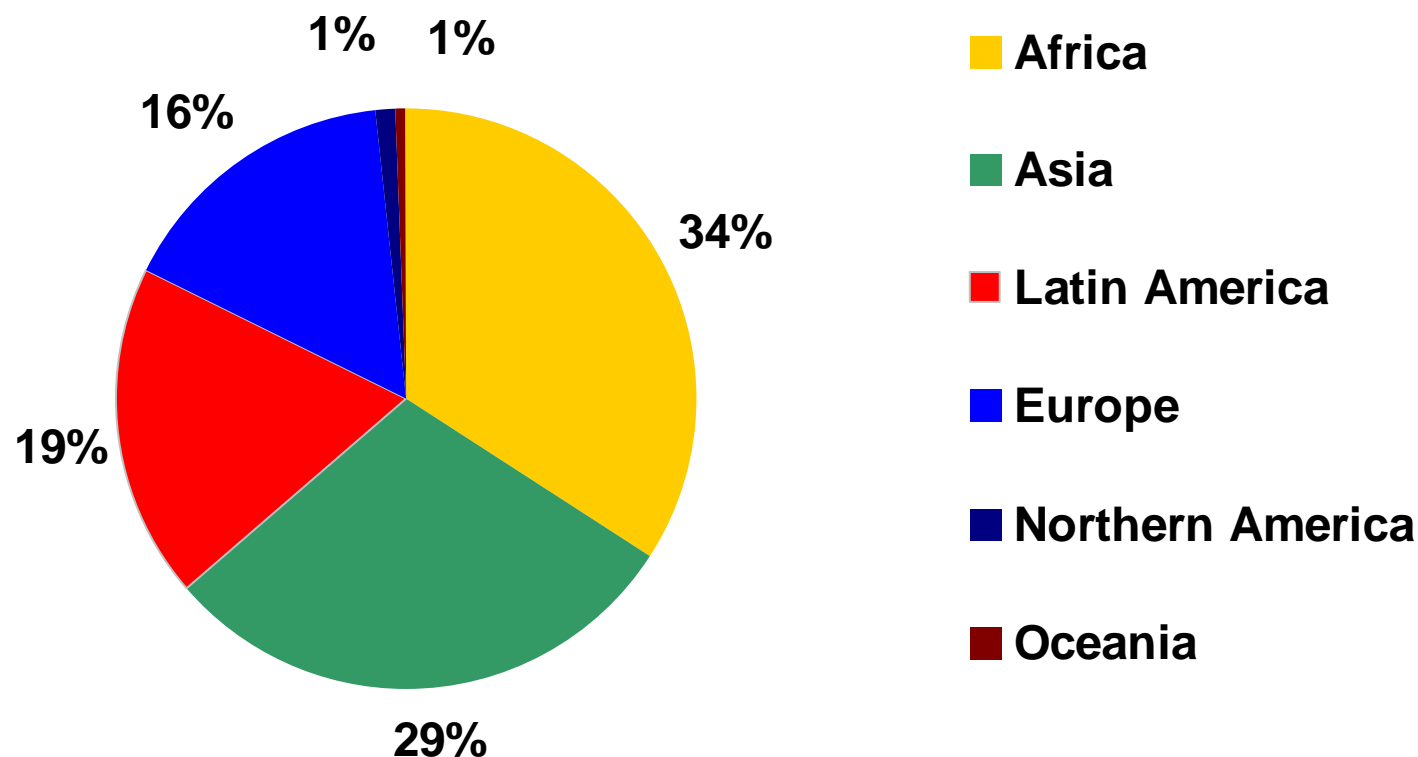
The ten countries with the highest INCREASE of organic agricultural land 2007-2008



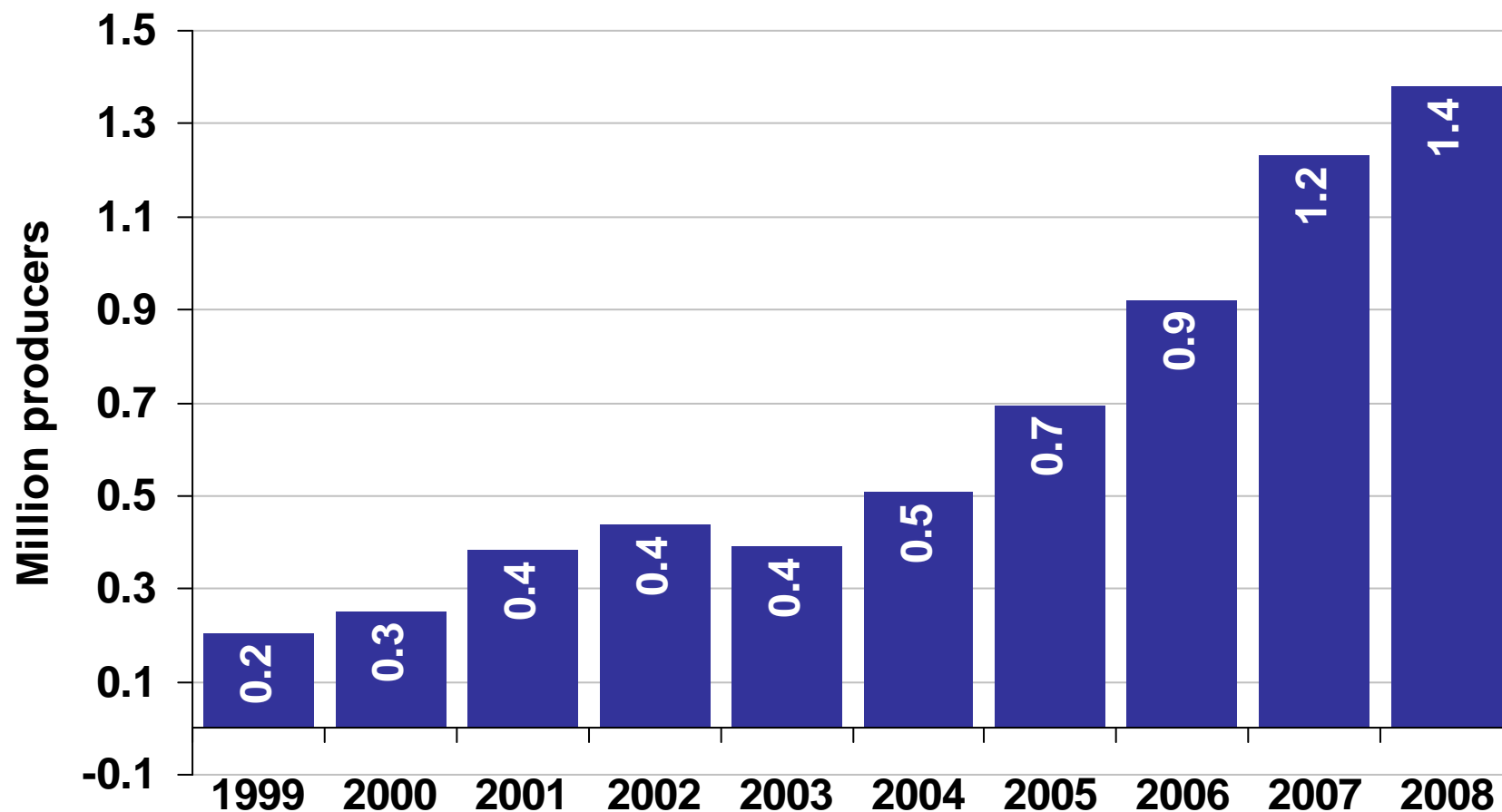
The ten countries with the largest numbers of organic producers 2008



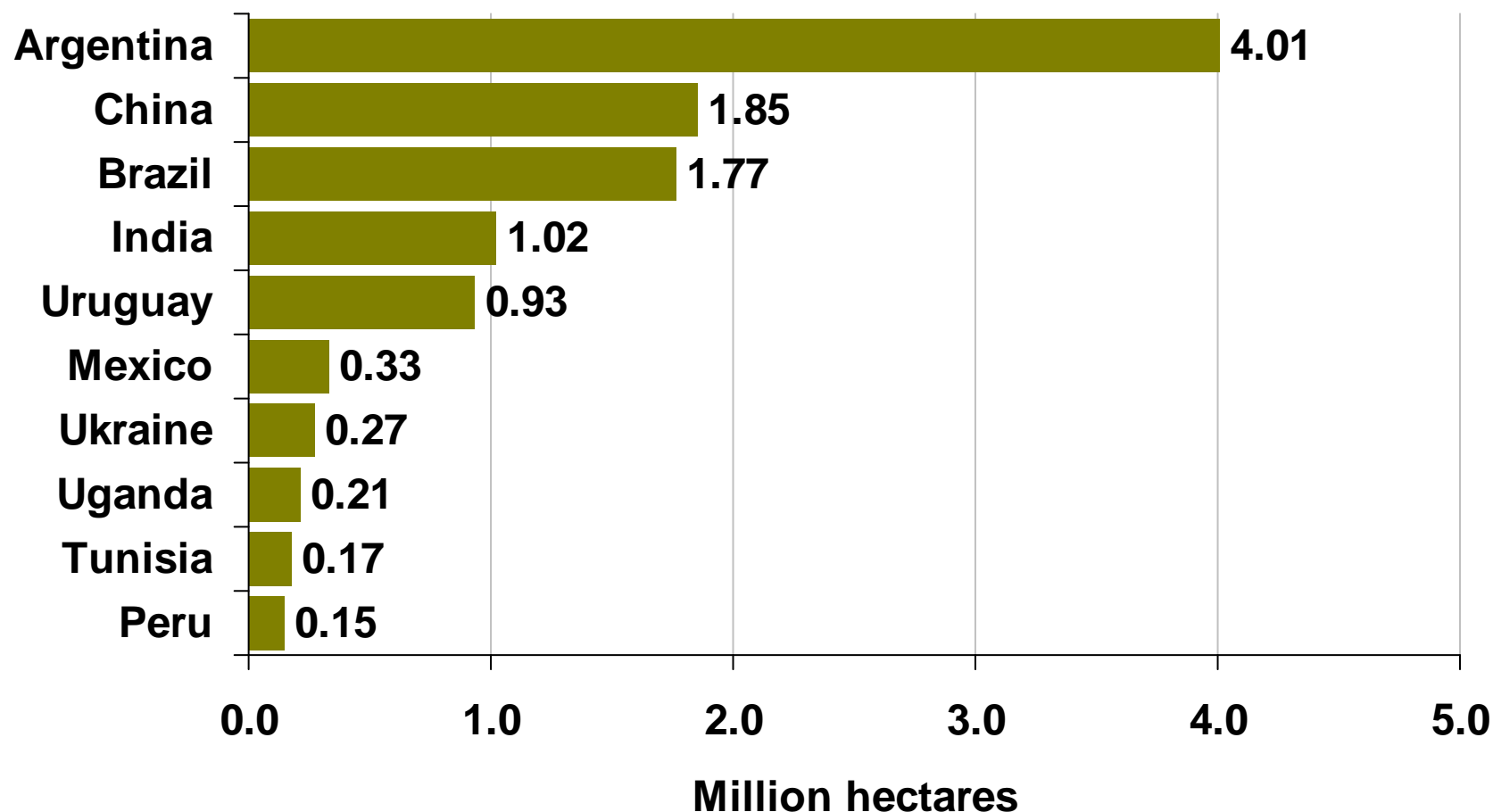
Organic producers by geographical region 2008 (total: 1.4 million)



World: Development of organic producers 1999-2008 (Revision date: February 2010)



Developing countries*: The ten countries with the largest areas of organic agricultural land 2008

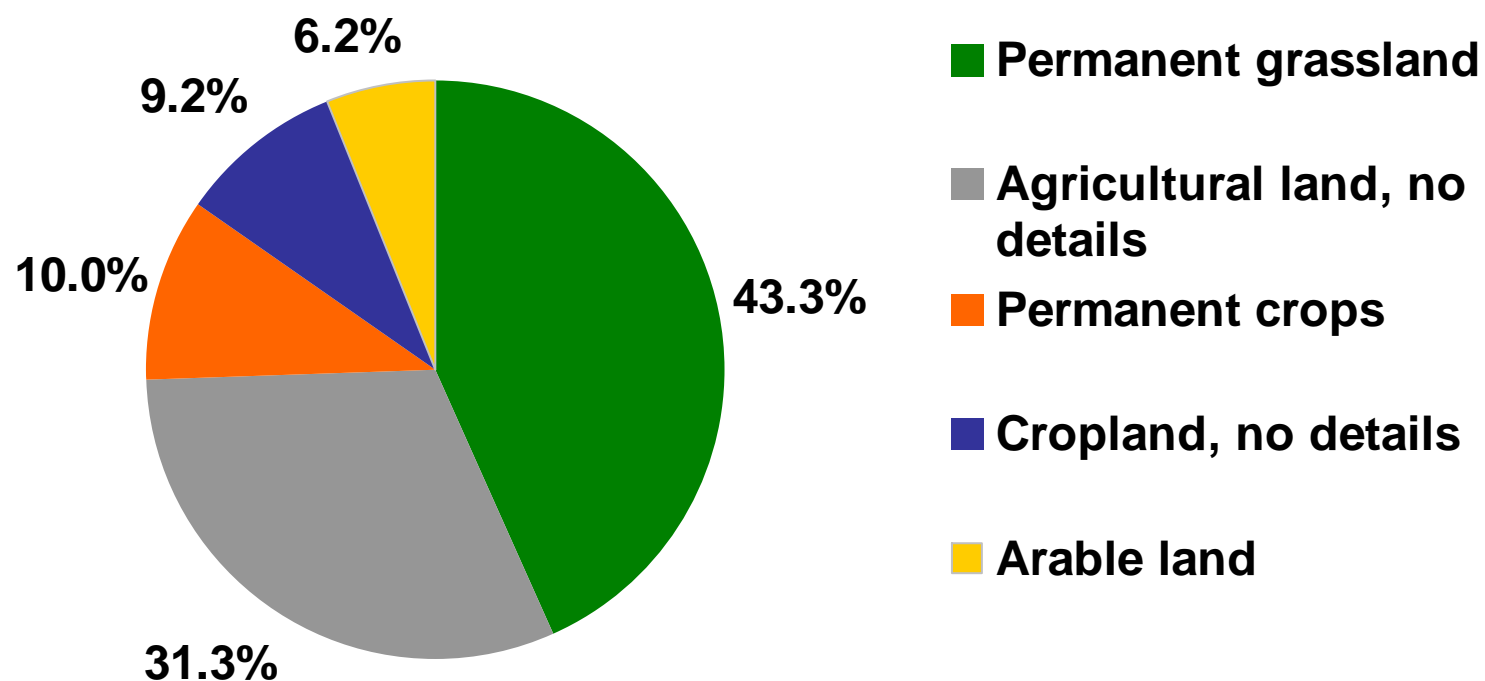


FiBL/IFOAM Survey 2010, based on data from governments, the private organic sector and certifiers

Developing countries = countries on the DAC list, see

http://www.oecd.org/document/45/0,3746,en_2649_34447_2093101_1_1_1_1,00.html

Developing countries: Use of organic agricultural land 2008



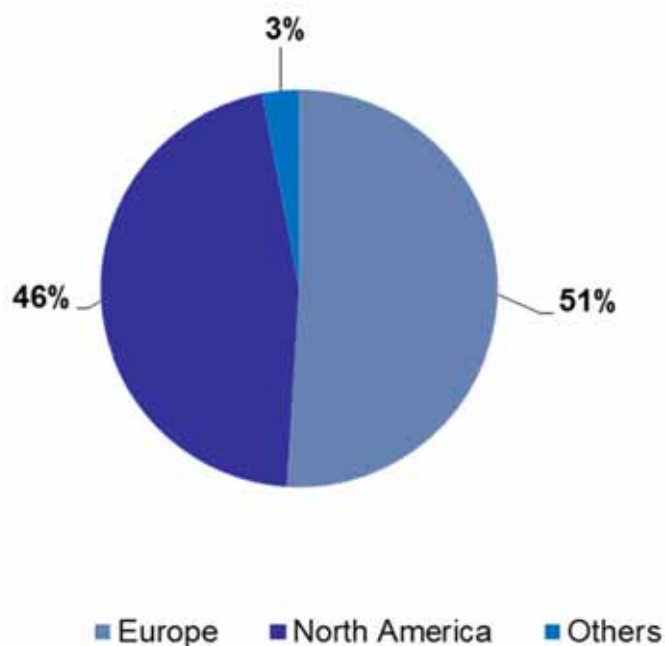
Global Market for Organic Food and Beverages

Market demand certified organic products

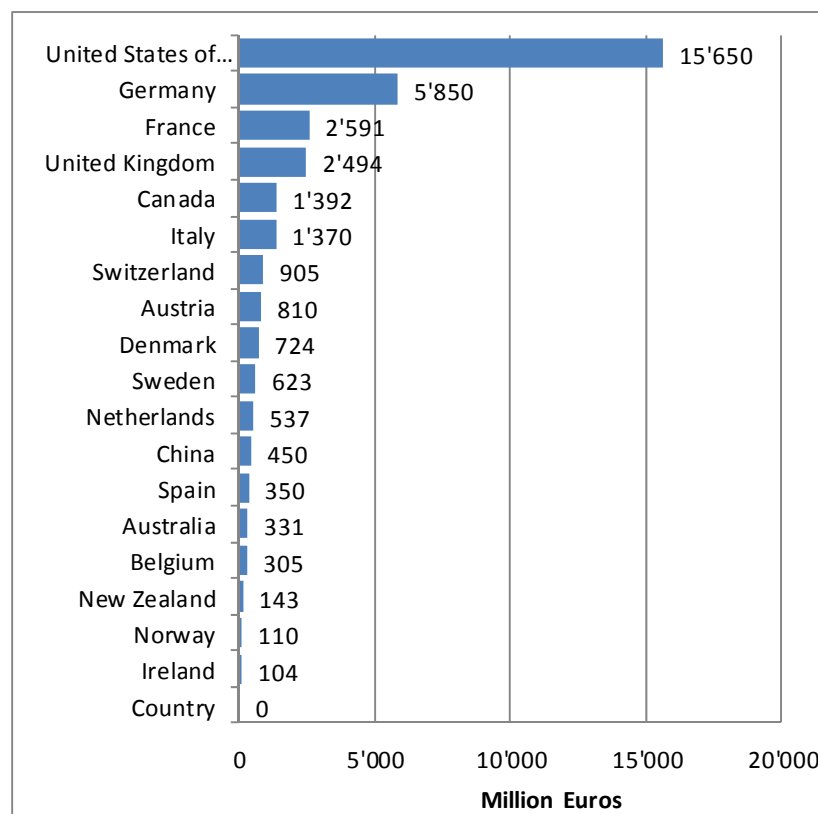
- › In 2008, the global market for certified organic food and drink was estimated to be 51 billion US Dollars or 34.8 billion Euros (average exchange rate 2008, Sahota (2010).
- › More than ninety percent of the organic product revenues is made in the Northern hemisphere. Europe accounts for 51 percent of the global organic food sales; North America for 46 percent (data 2008, Sahota 2010).
- › In 2008, the by far largest market was the United States with 15.9 billion Euros of organic food sales, followed by Germany with 5.9 billion and France with 2.6 billion Euros (FiBL 2010).
- › The volume of the turnover with organic products has trebled since 1999, when it was estimated to be 15 billion US Dollars (2008: 51 billion US Dollars). Many countries showed double digit growth rates in 2008. With the economic crisis growth slowed down in 2009 in many countries, or stagnated (Germany), but some countries showed healthy growth also in 2009, for instance France (+15 percent), Norway (+10 percent) or the US, (+ 8 percent). (Slide C 3)
- › In 2008, the countries with the highest market shares for organic food were Denmark, followed by Austria and Switzerland.
- › These are also the countries that have the highest annual per capita consumption.
- › Shares that are reached for some products and product groups are, however, considerably higher as is shown by data that some countries provide. In Switzerland 17 percent of the eggs sold in the general retail trade are organic, 13 percent of the bread and 11 percent of the vegetables. In the US ten percent of the fruit and vegetables sold are organic (Haumann 2009). The most popular organic product groups are fresh fruit and vegetables, dairy products and bakery wares.

Organic food sales world-wide 2008

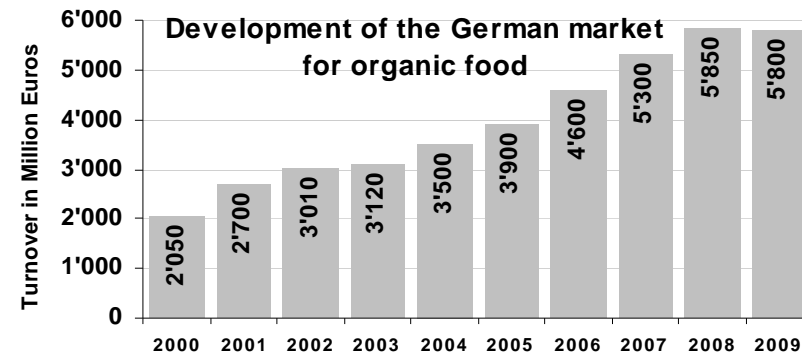
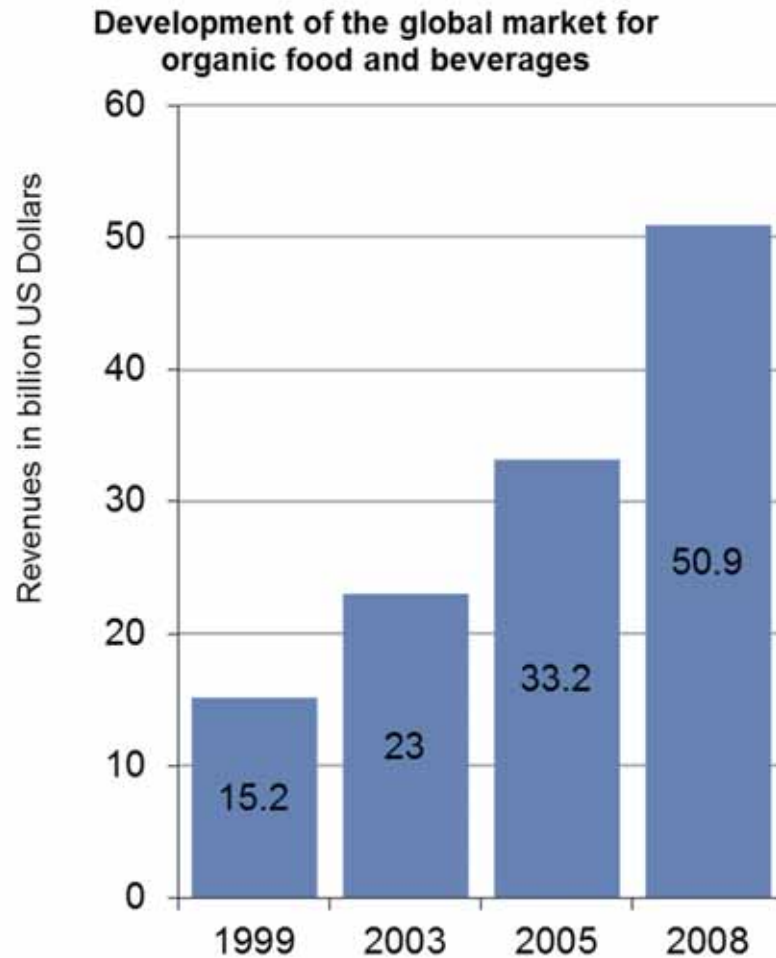
Distribution of organic food sales by region 2008



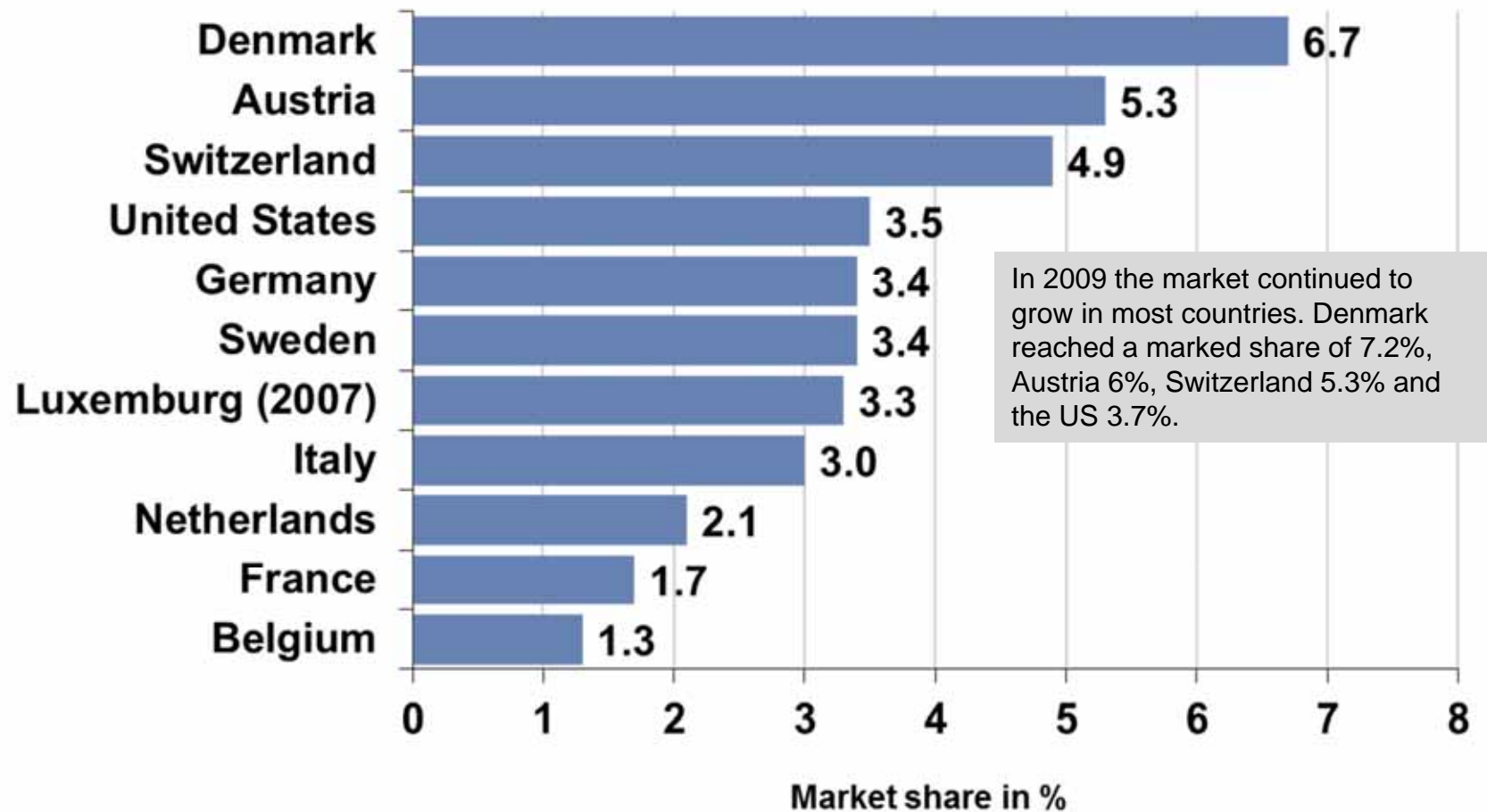
Domestic Turnover with Organic Food 2008
(only countries with a turnover of more 100 million Euro)



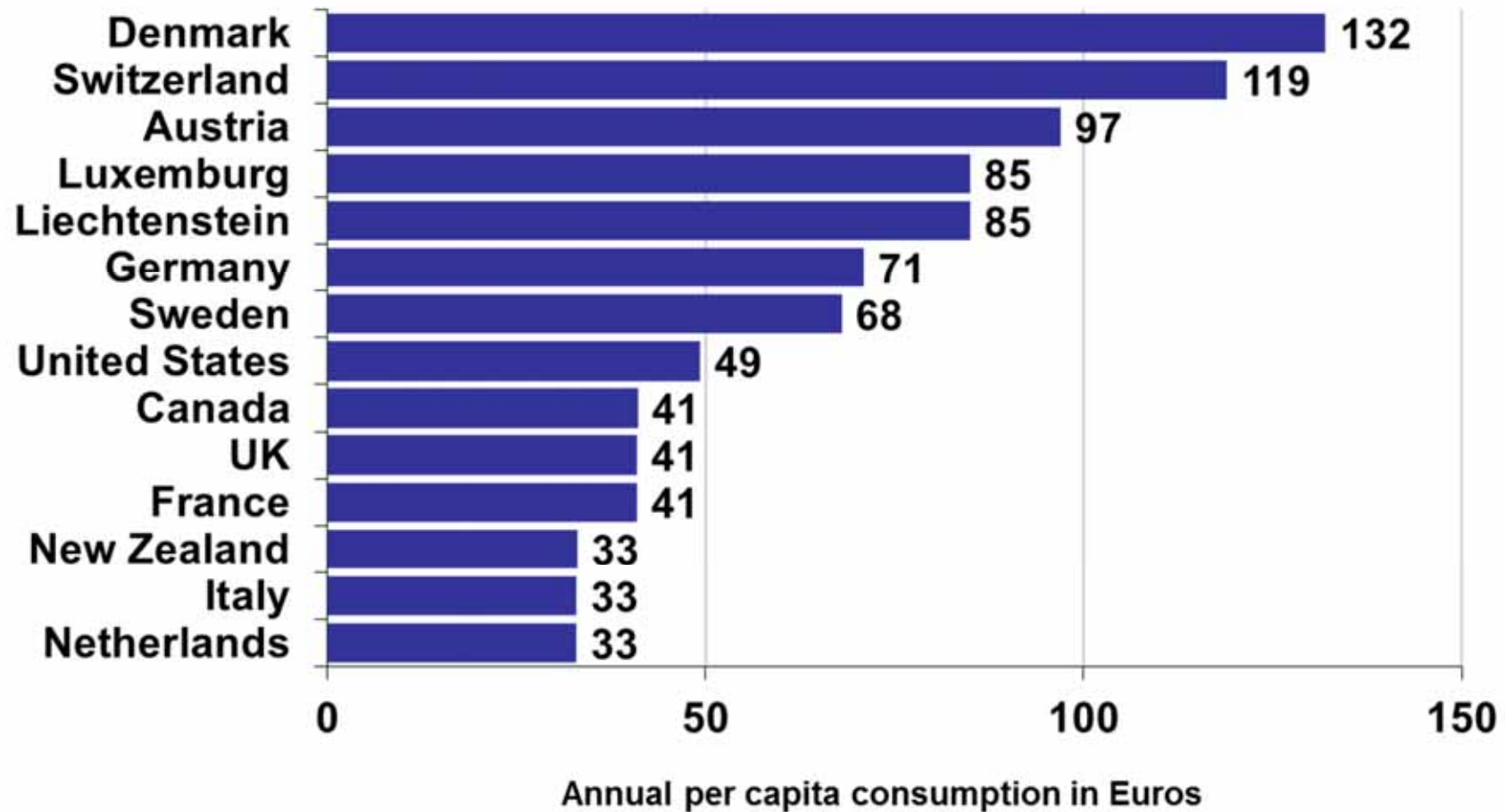
Growth of sales with organic food and beverages: World, US and Germany



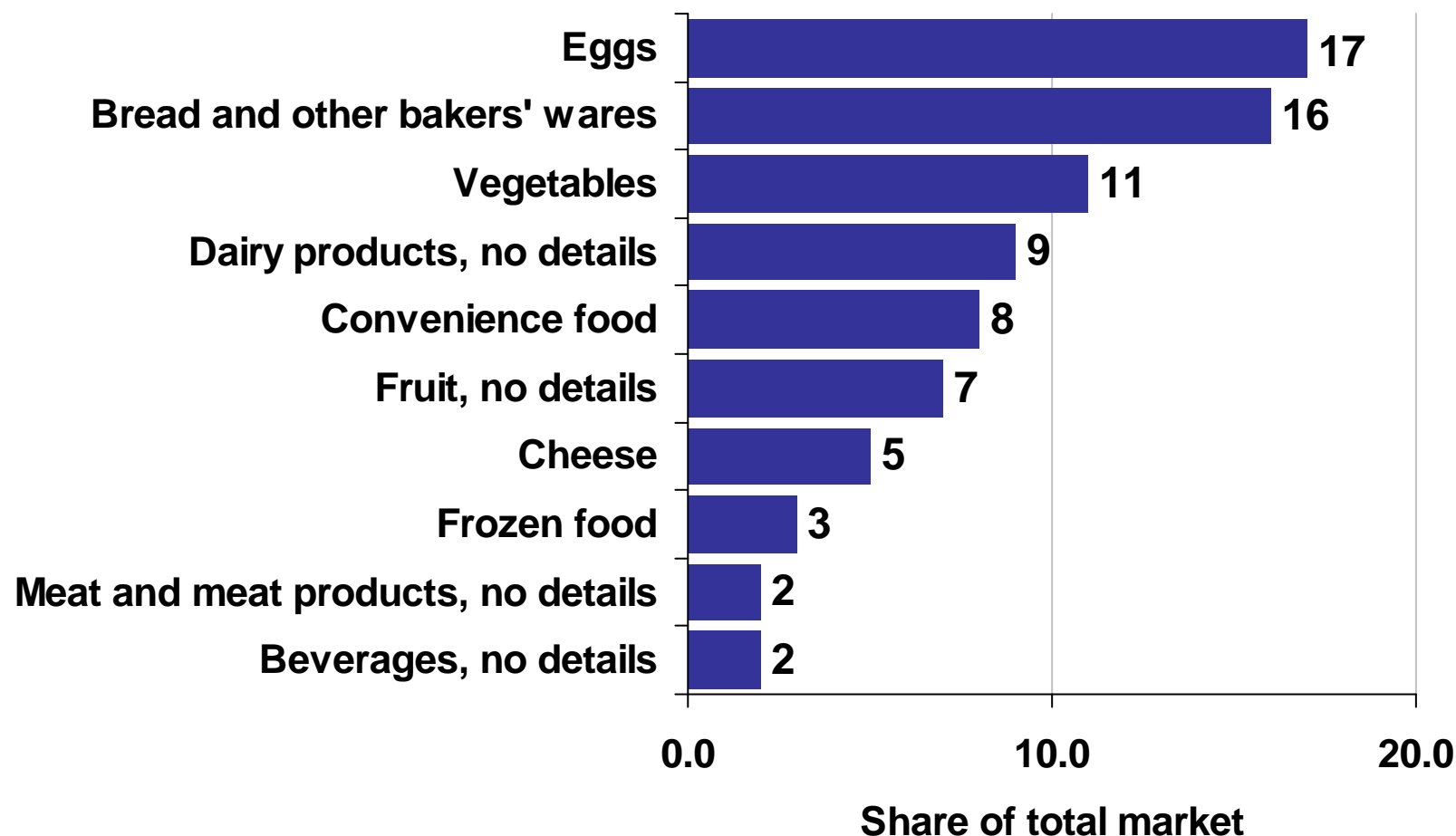
The countries with the highest shares of organic food sales 2008 (not for all countries data are available)



The countries with the highest per capita consumption (most data 2008)

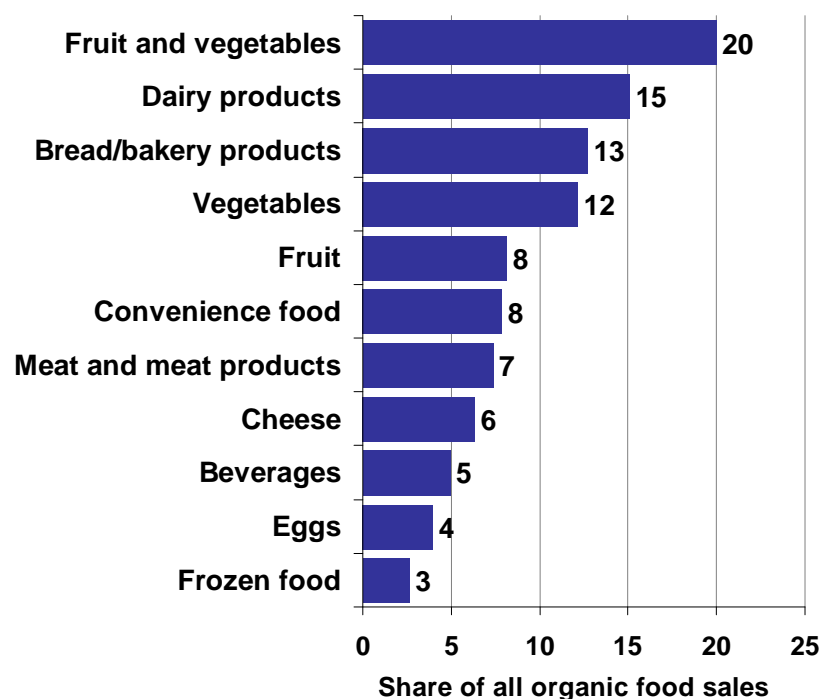


Switzerland: Shares of the total market for selected organic product groups 2009

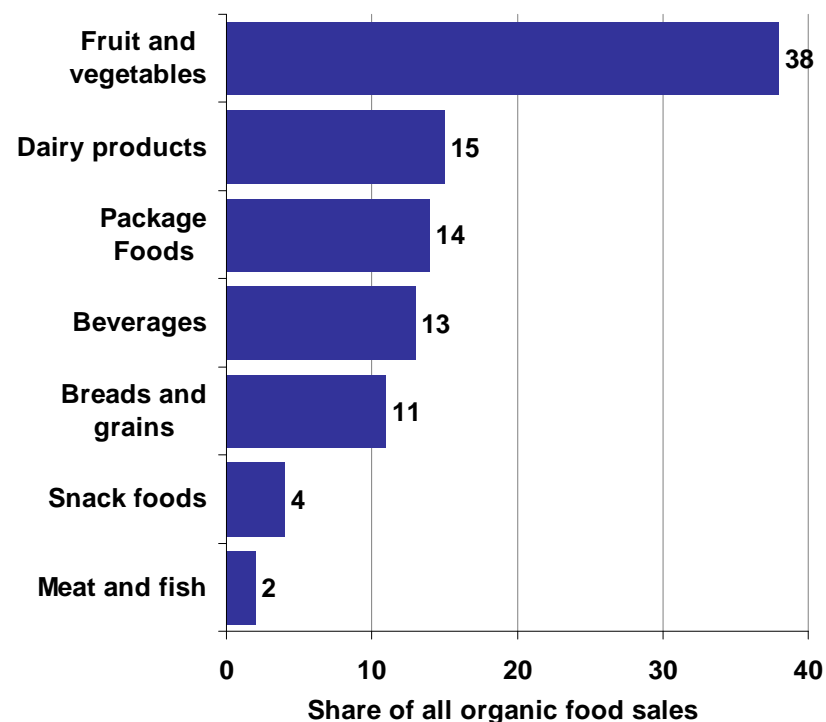


Switzerland and USA: Importance of selected product groups of the overall turnover with organic food 2009

Switzerland



USA

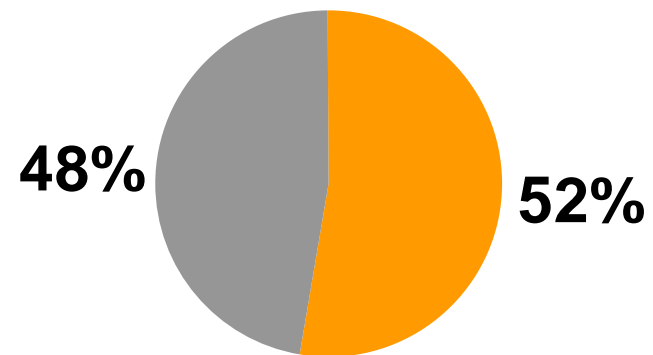


Land use and crops

Definition of organic areas

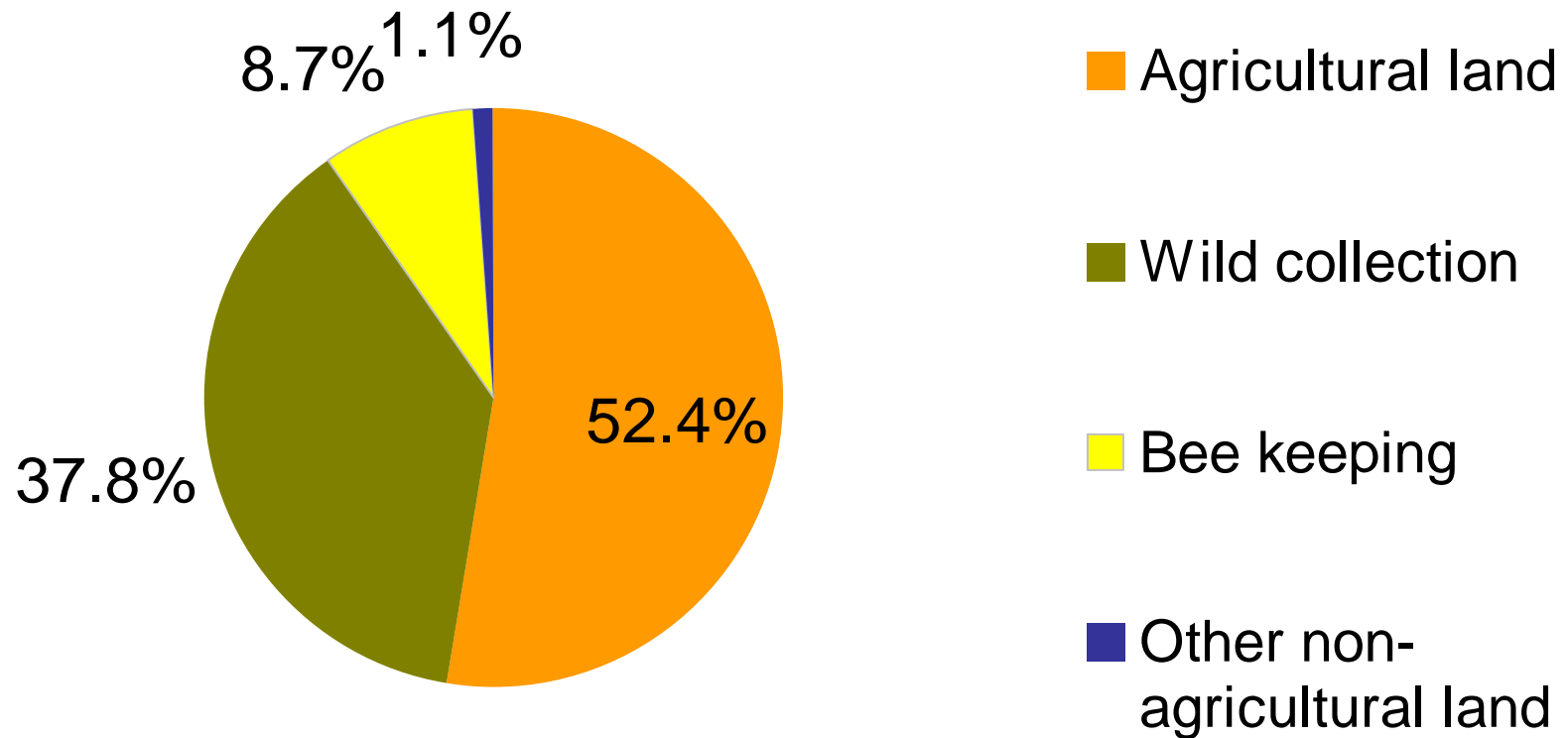
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 - › Grazing on non-agricultural land
 - › Wild collection/Bee keeping

**Distribution of
agricultural and non-
agricultural areas 2008**



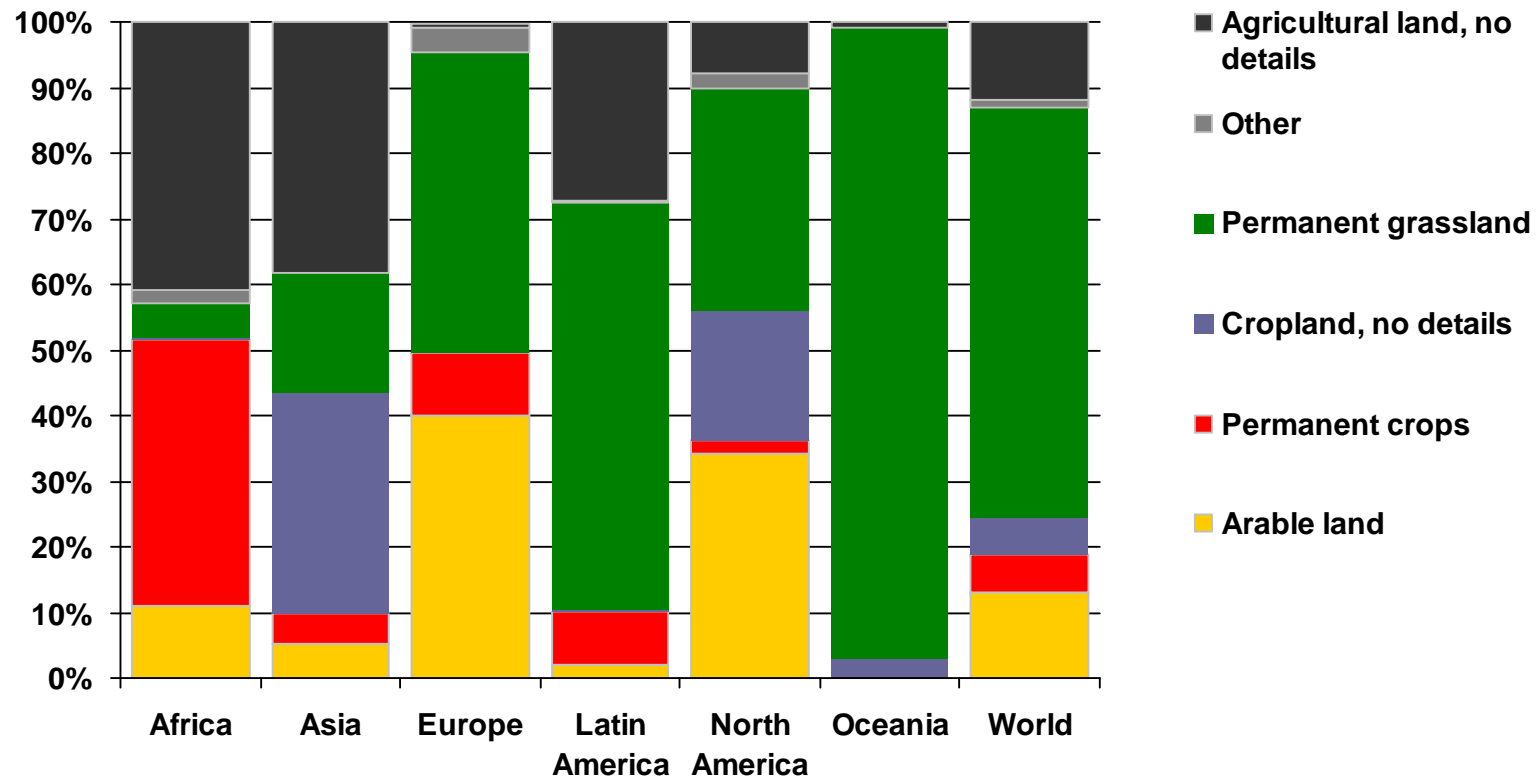
- **Agricultural land**
- **Non agricultural areas**

World: Use of total land under organic certification (67.8 million hectares) 2008



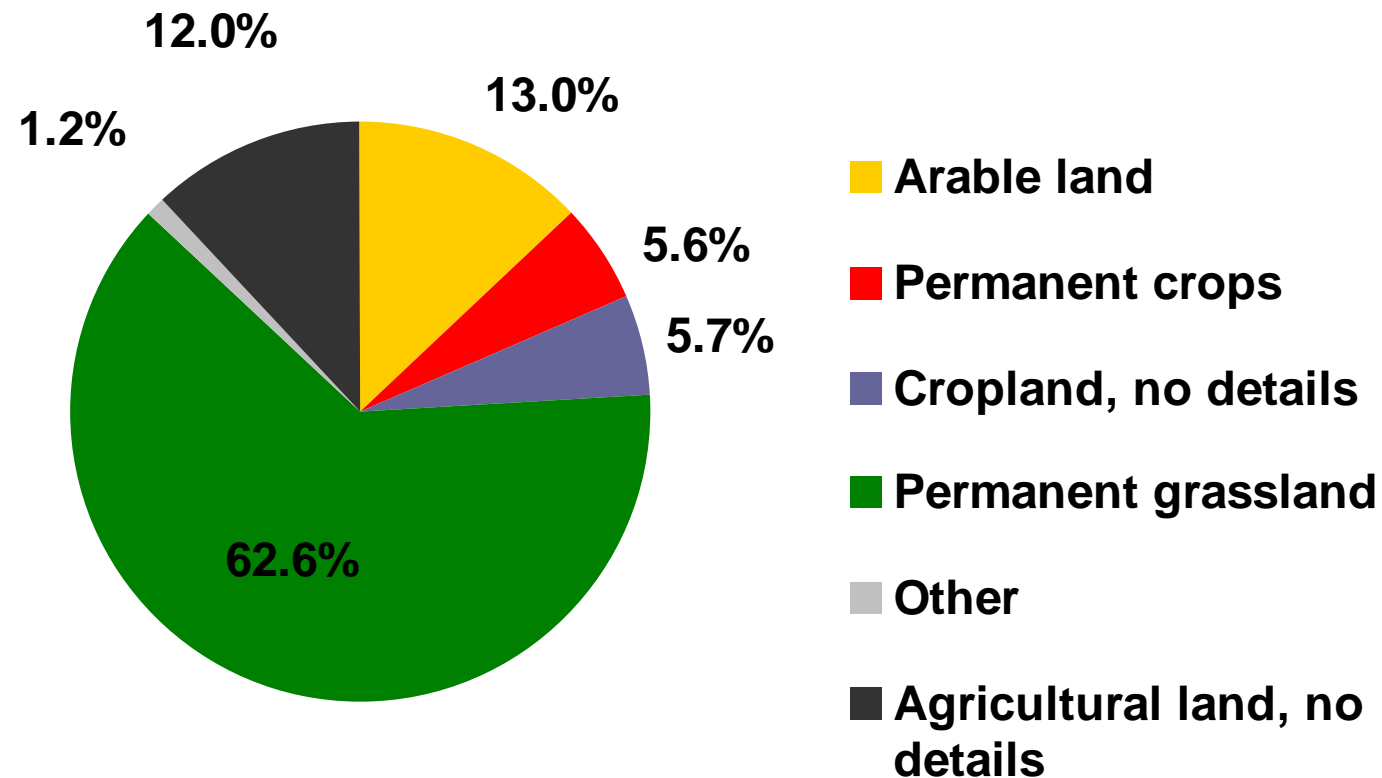
Agricultural land use by geographical region in organic agriculture 2008

(revision dta: March 5, 2010)



World: Use of organic agricultural land 2008 (total: 35 million hectares)

(Revision date: March 5, 2010)

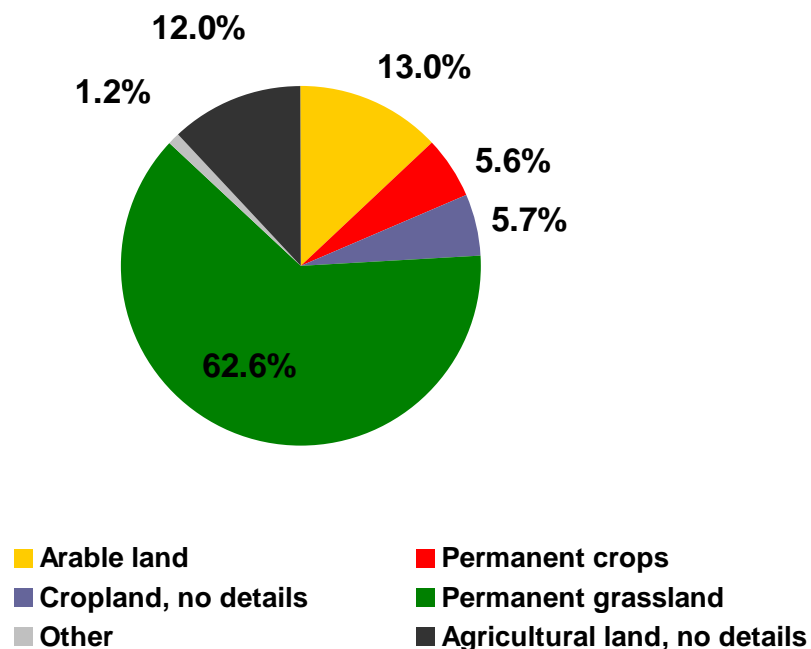


World: Use of organic agricultural land 2008

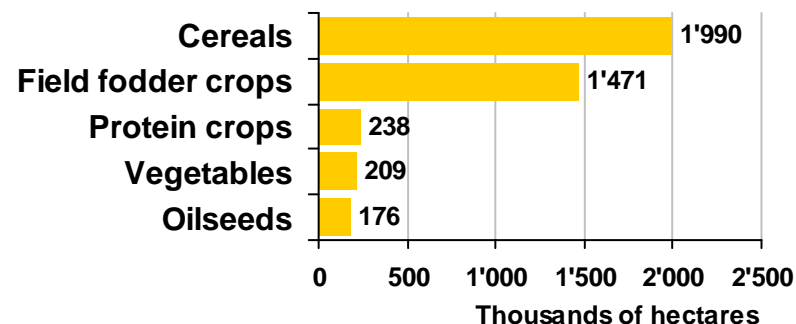
(total: 35 million hectares)

(Revision date: March 5, 2010)

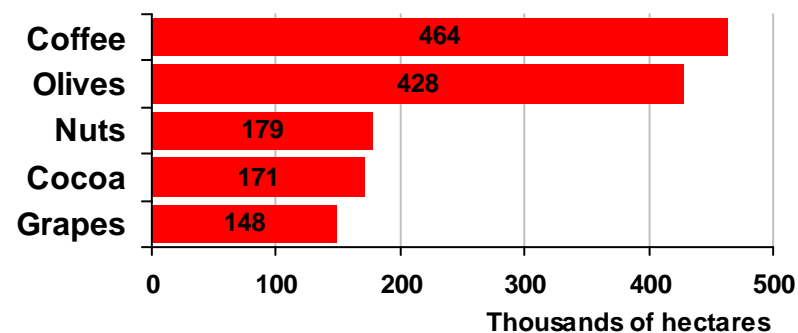
Distribution of main agricultural land use types 2008



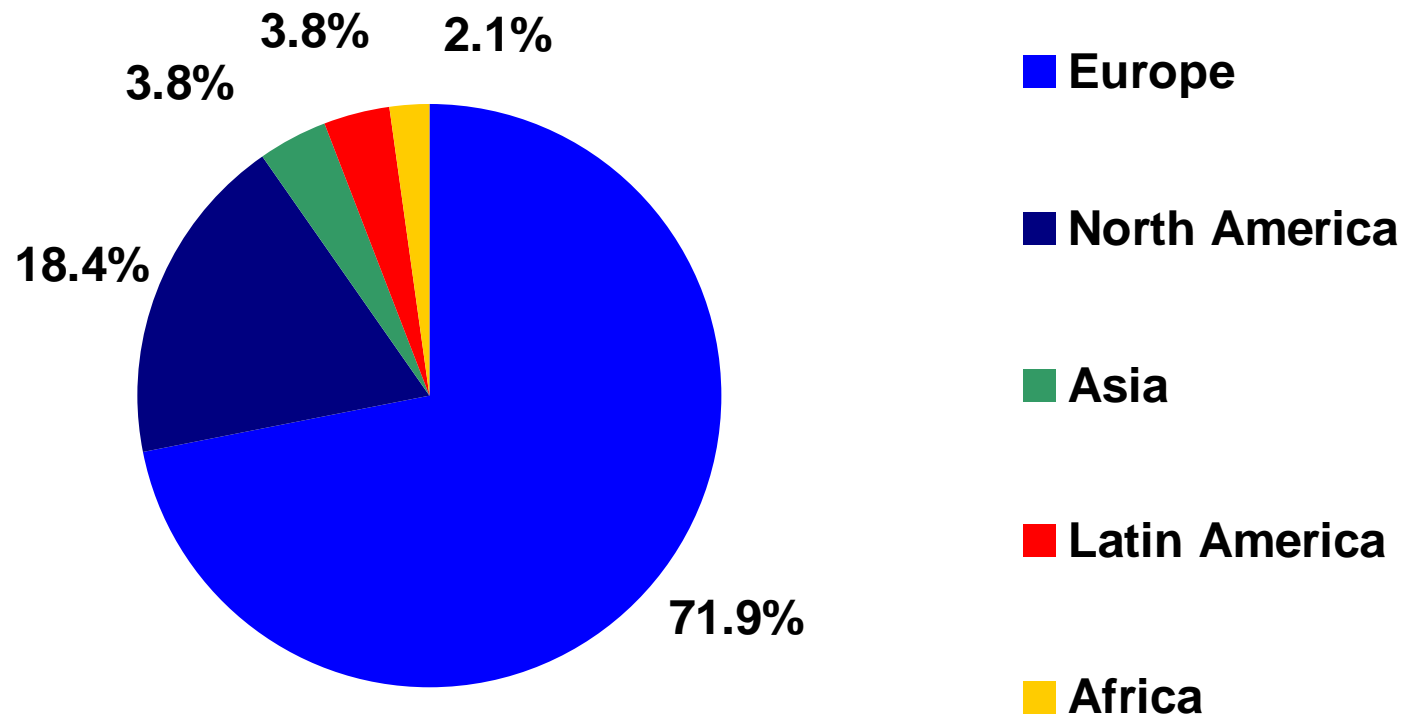
The main arable crops 2008



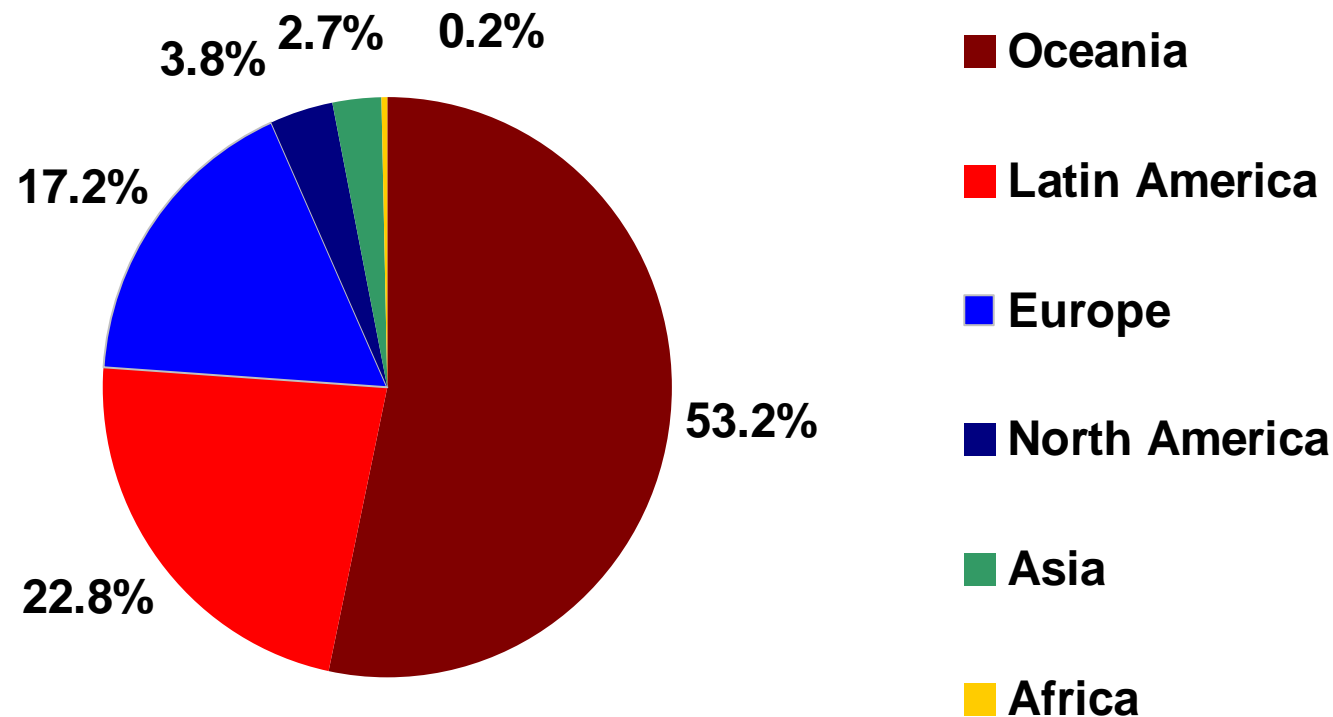
The main permanent crops 2008



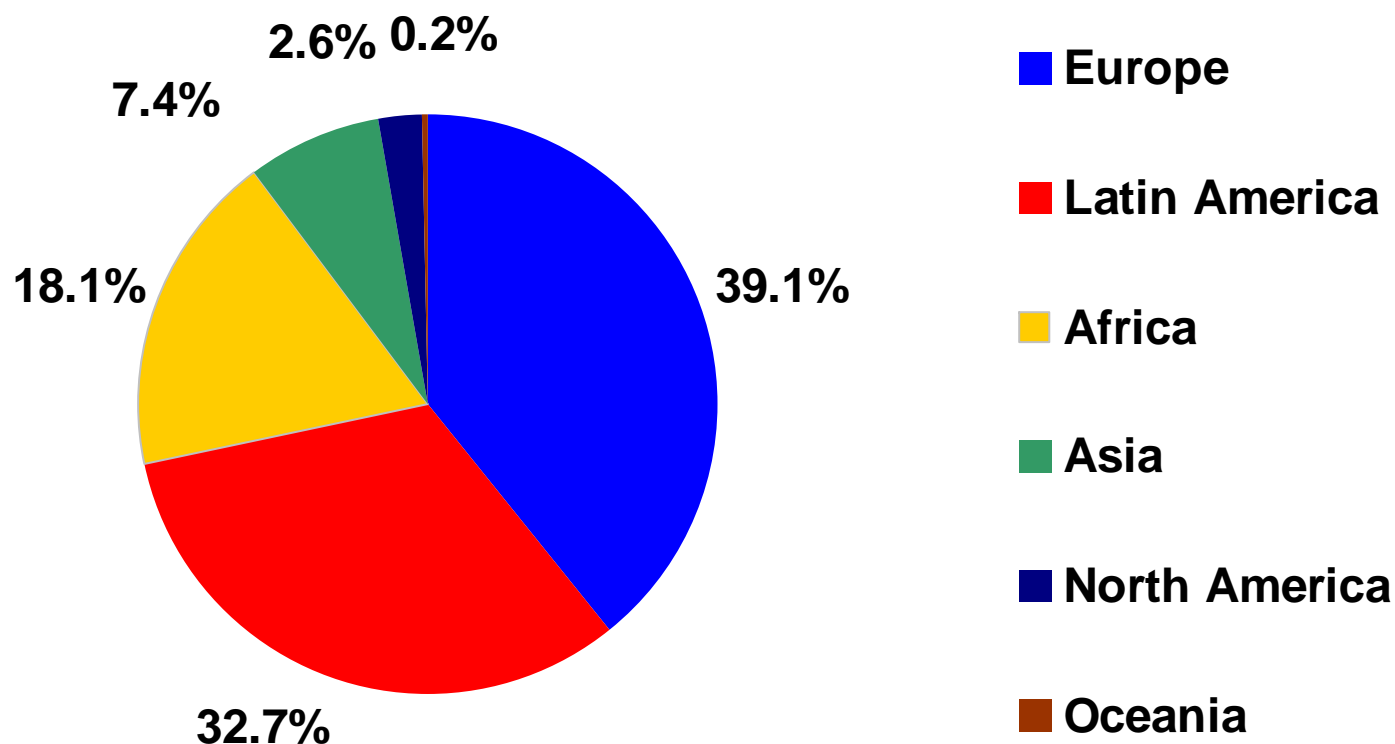
Organic arable land by geographical region 2008 (total 4.6 million hectares)



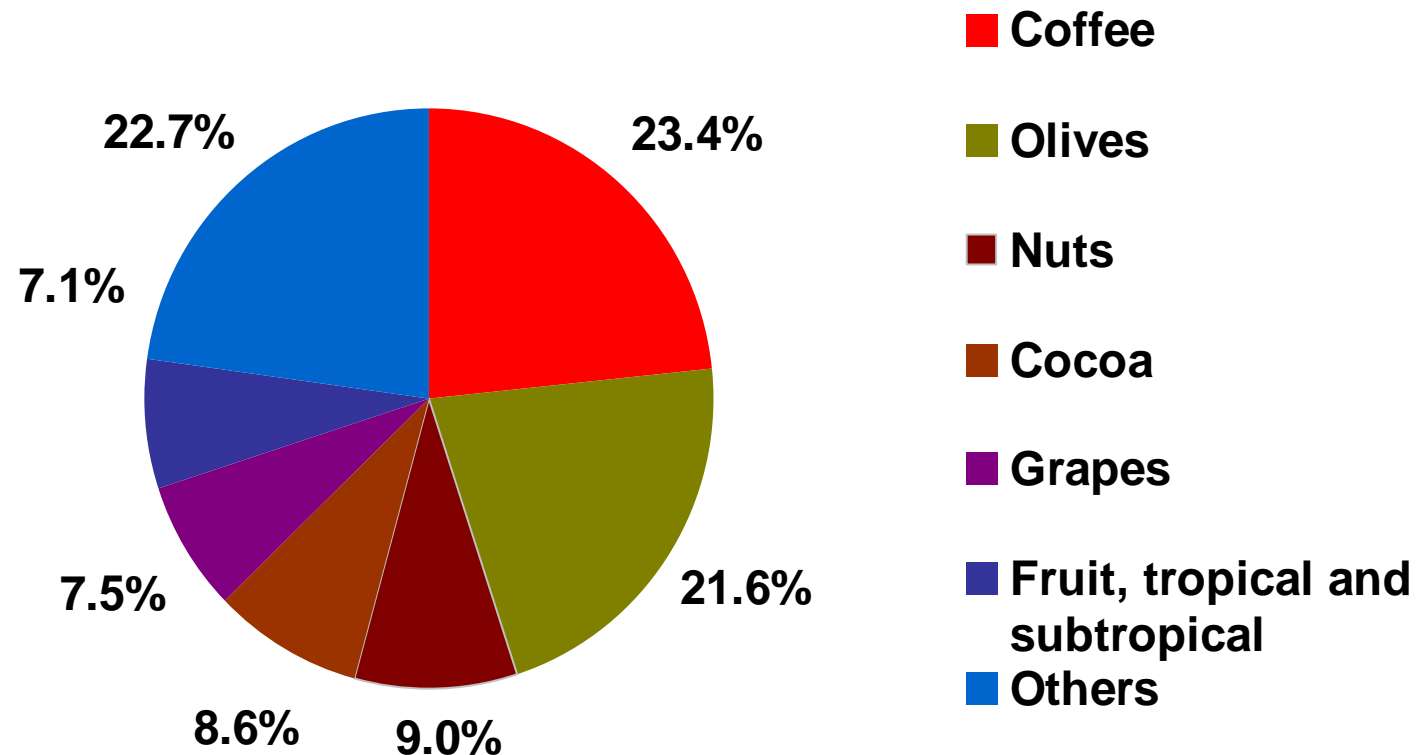
Organic permanent grassland/grazing areas by geographical region 2008 (total 22 million hectares)



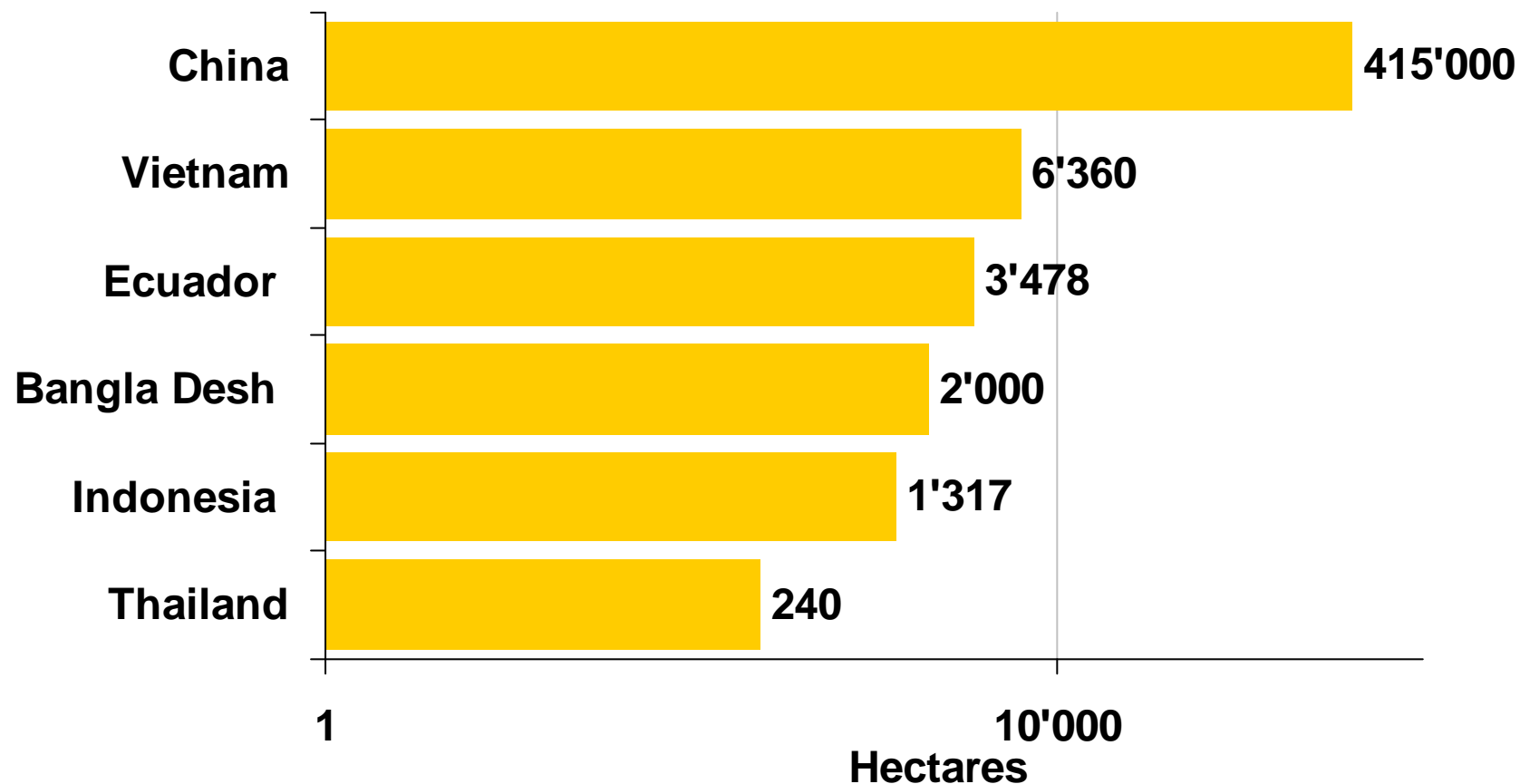
Organic permanent cropland by geographical region 2008 (total 2 million hectares)



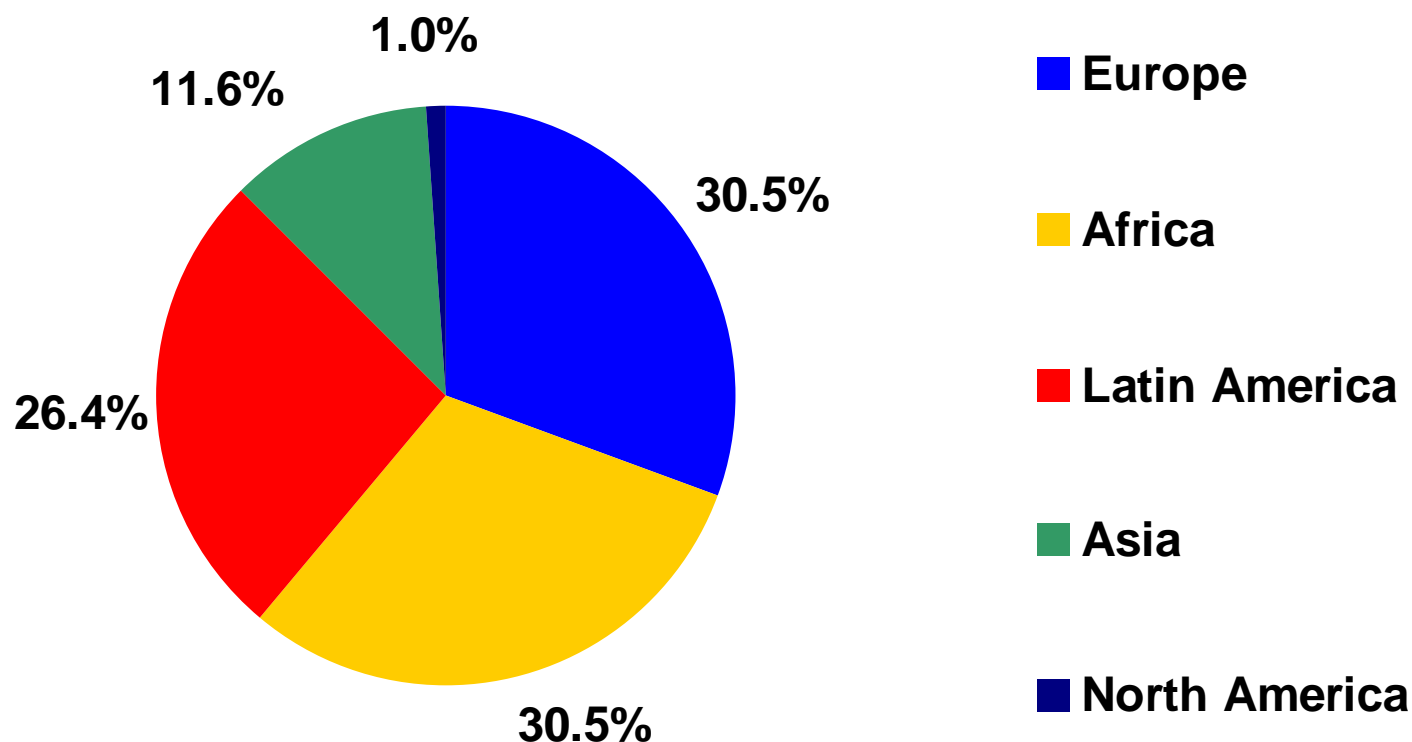
Organic permanent cropland by main crop types 2008 (total 2 million hectares)



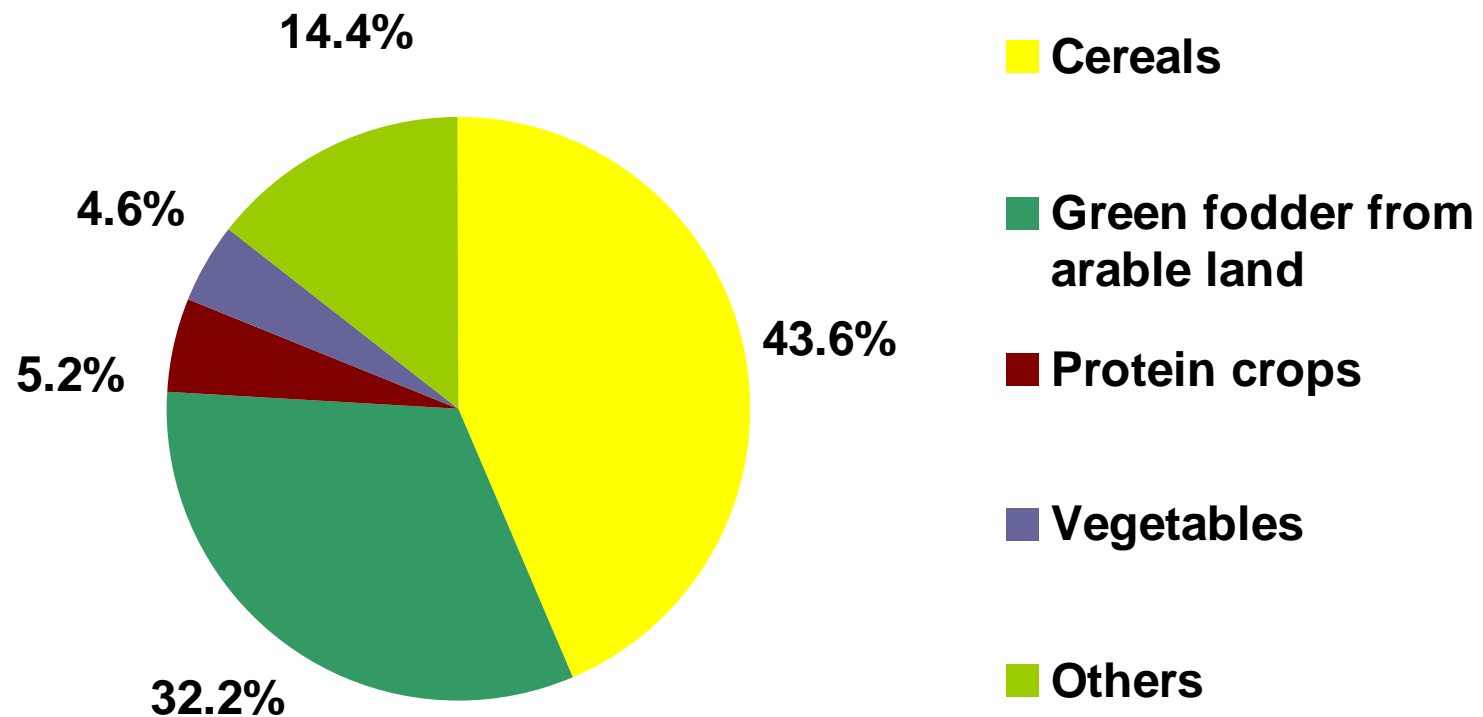
Organic aquaculture 2008



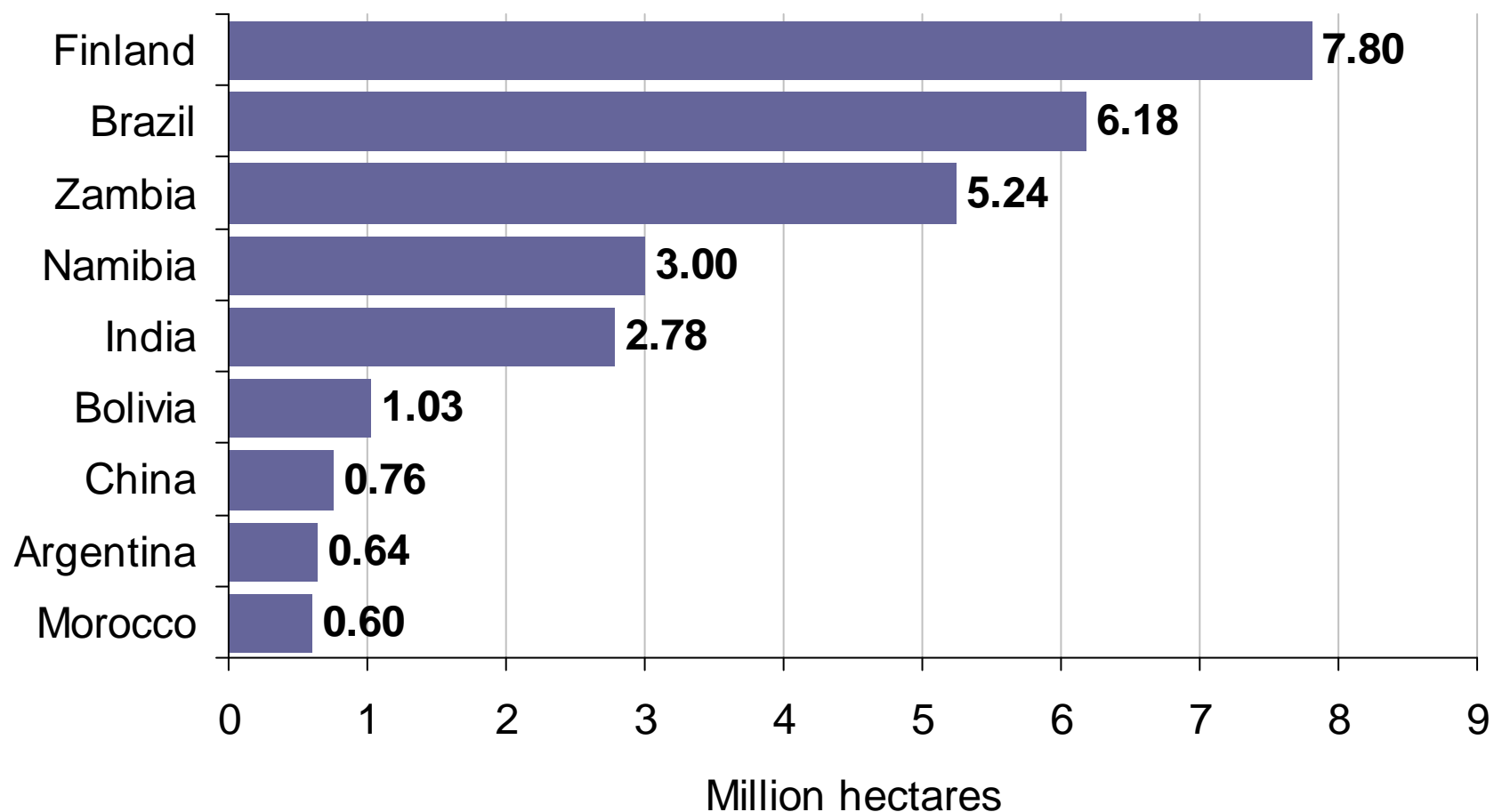
Organic wild collection & bee-keeping areas: Distribution by geographical region 2008



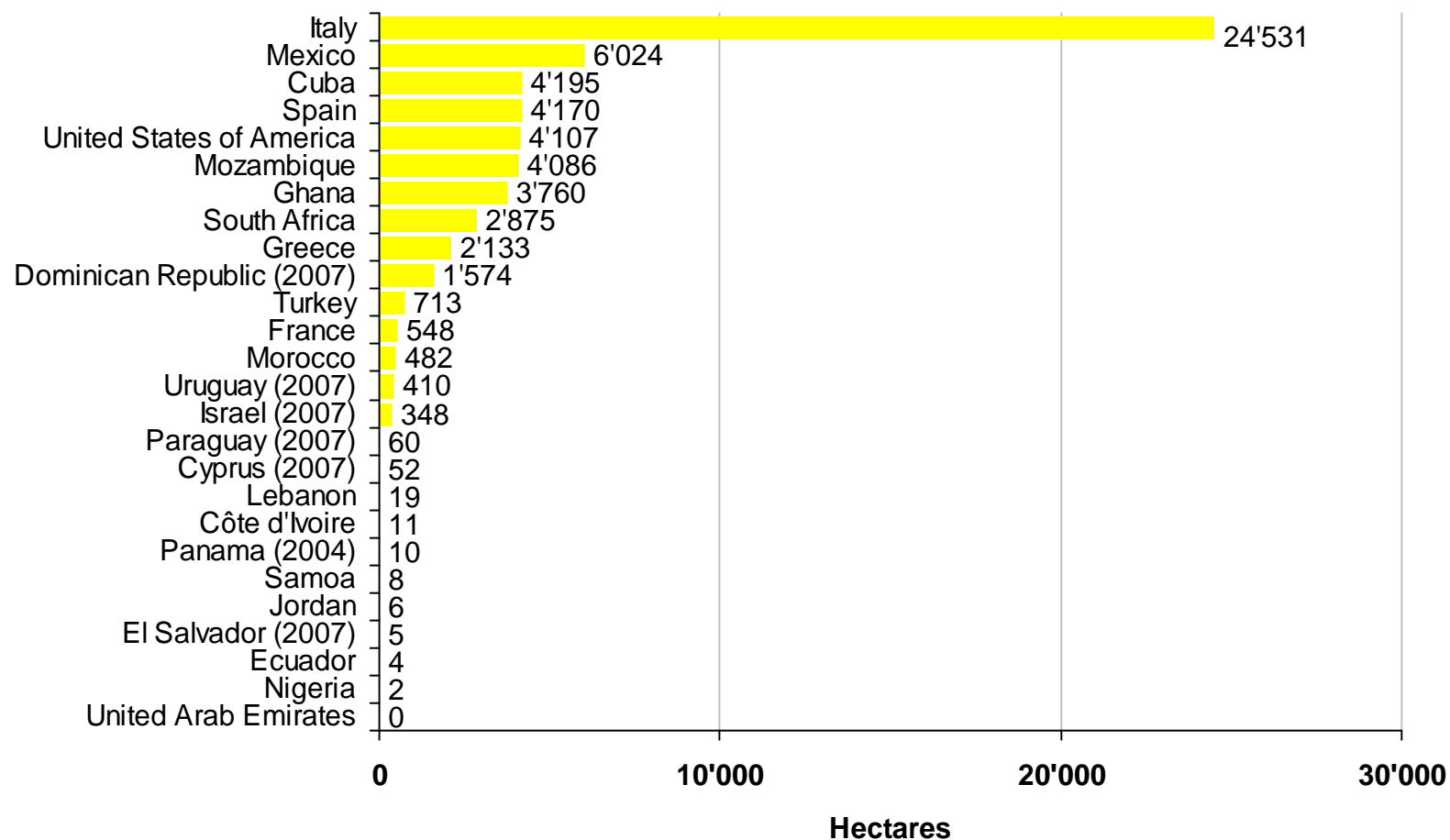
Organic arable land worldwide by main crop types 2008 (total 4.6 million hectares)



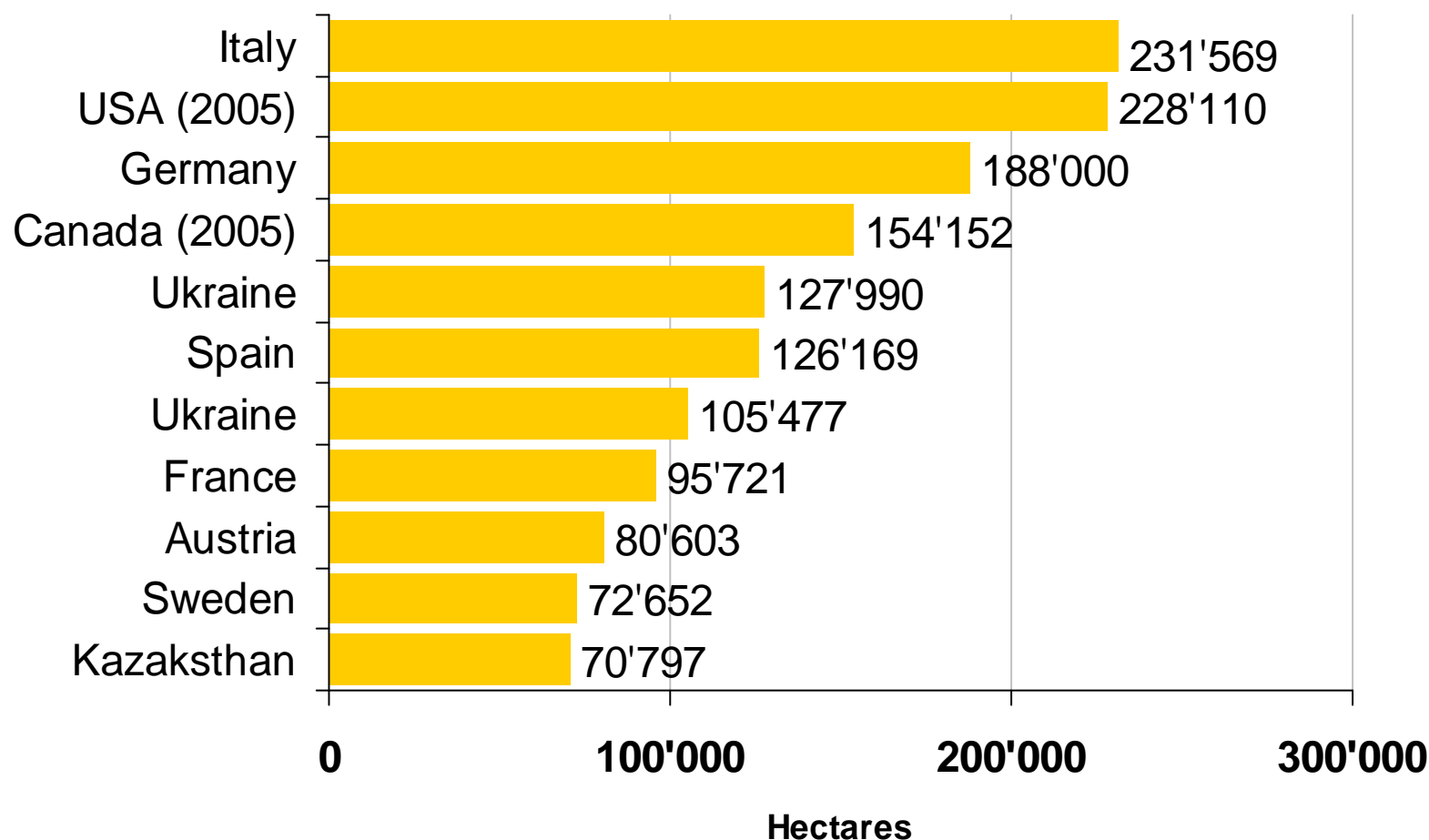
Organic wild collection: The ten countries with the largest wild collection areas (including bee-keeping) 2008



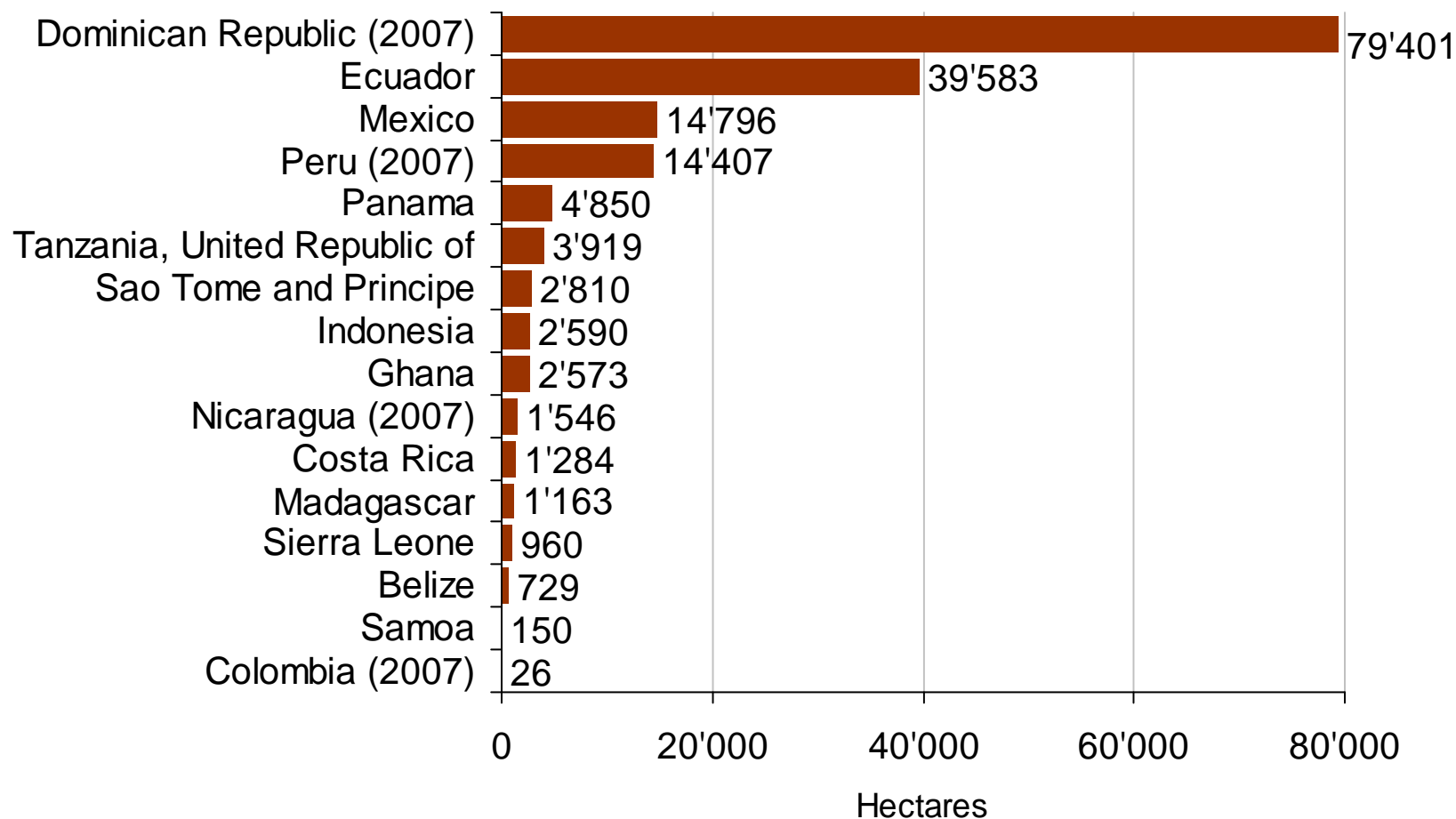
Organic citrus area by country 2008



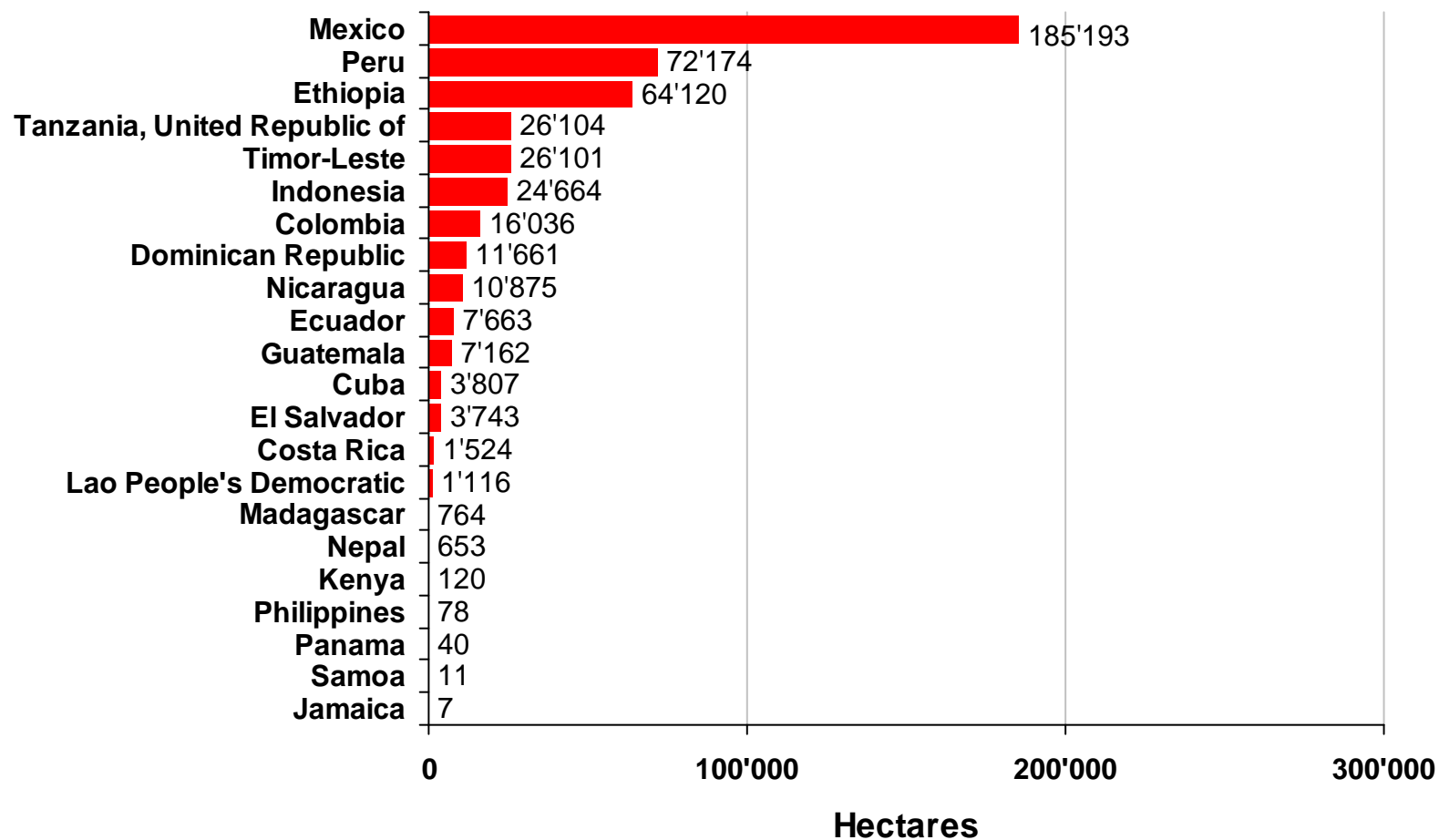
Organic cereals: The ten countries with the largest areas 2008



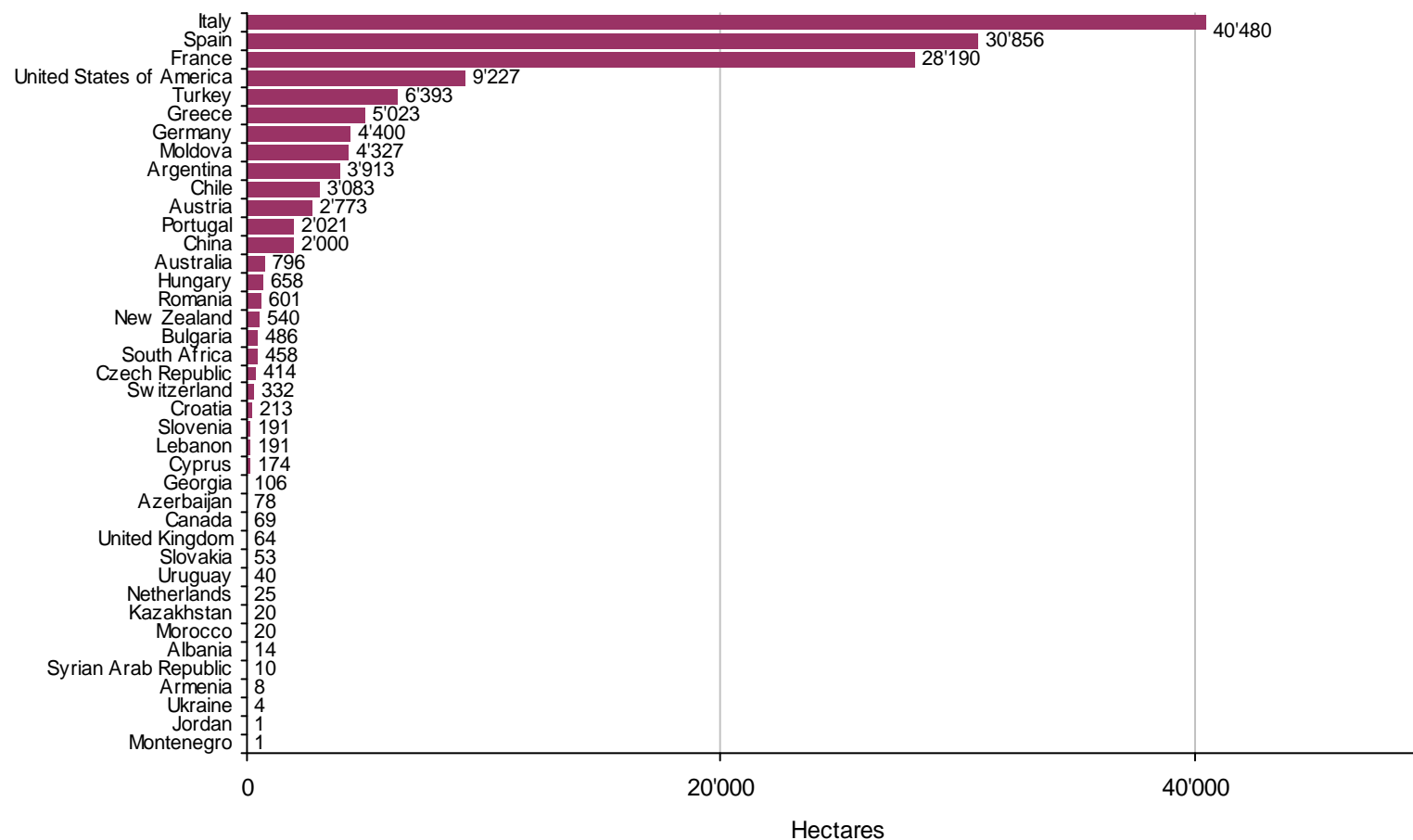
Organic cocoa area by country 2008



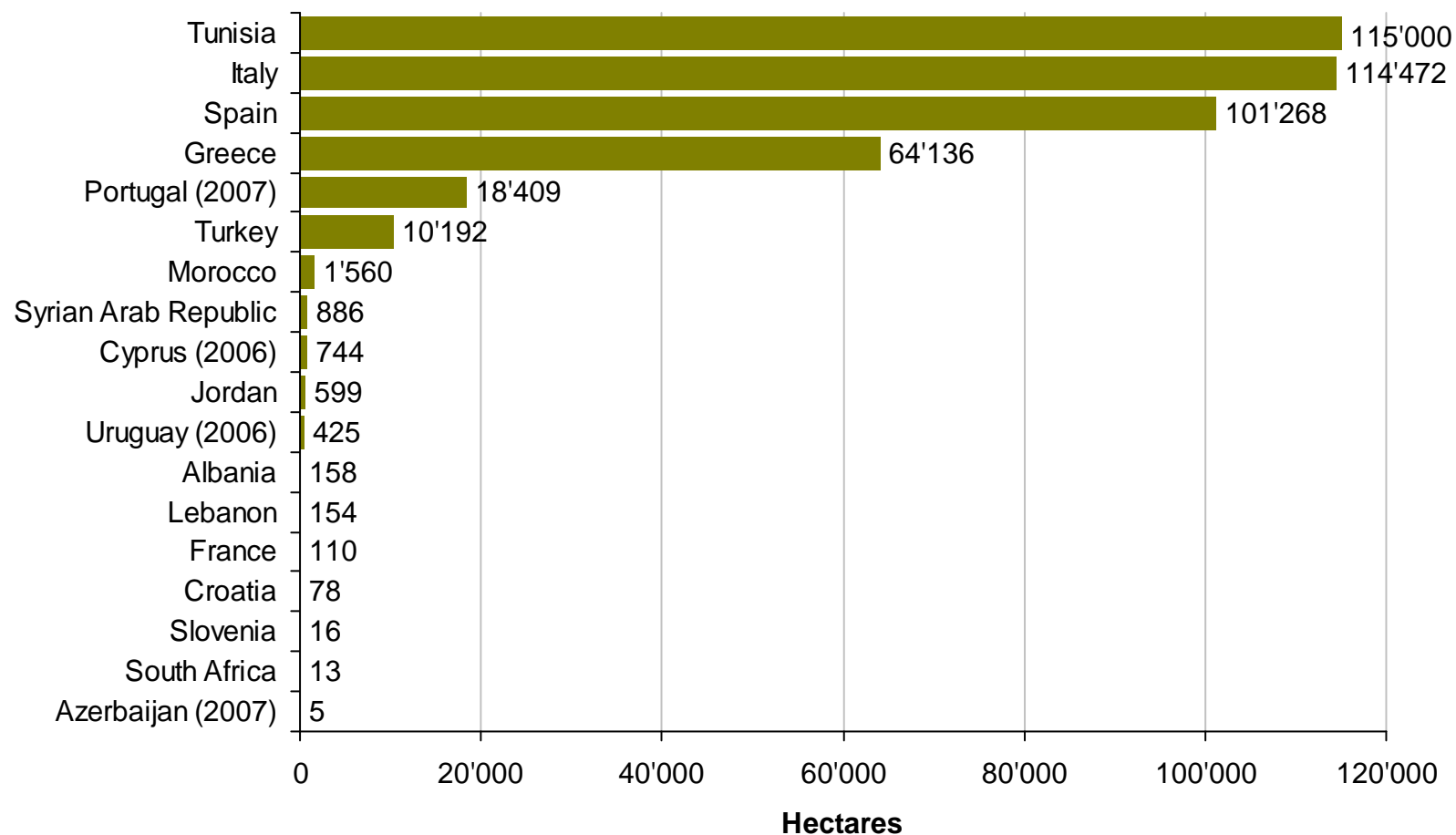
Organic coffee area by country 2008



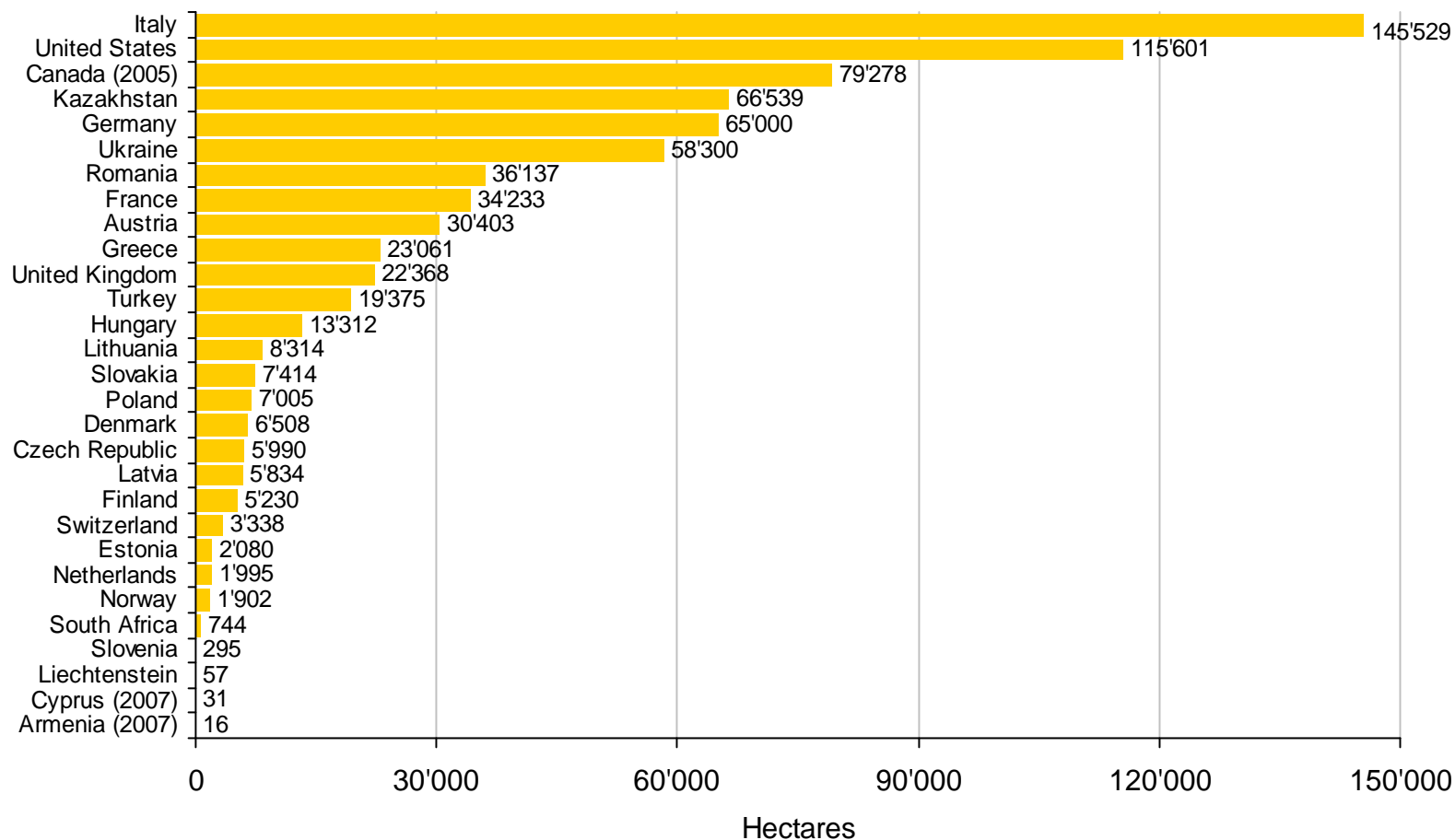
Organic grape area by country 2008



Organic olive area by country 2008

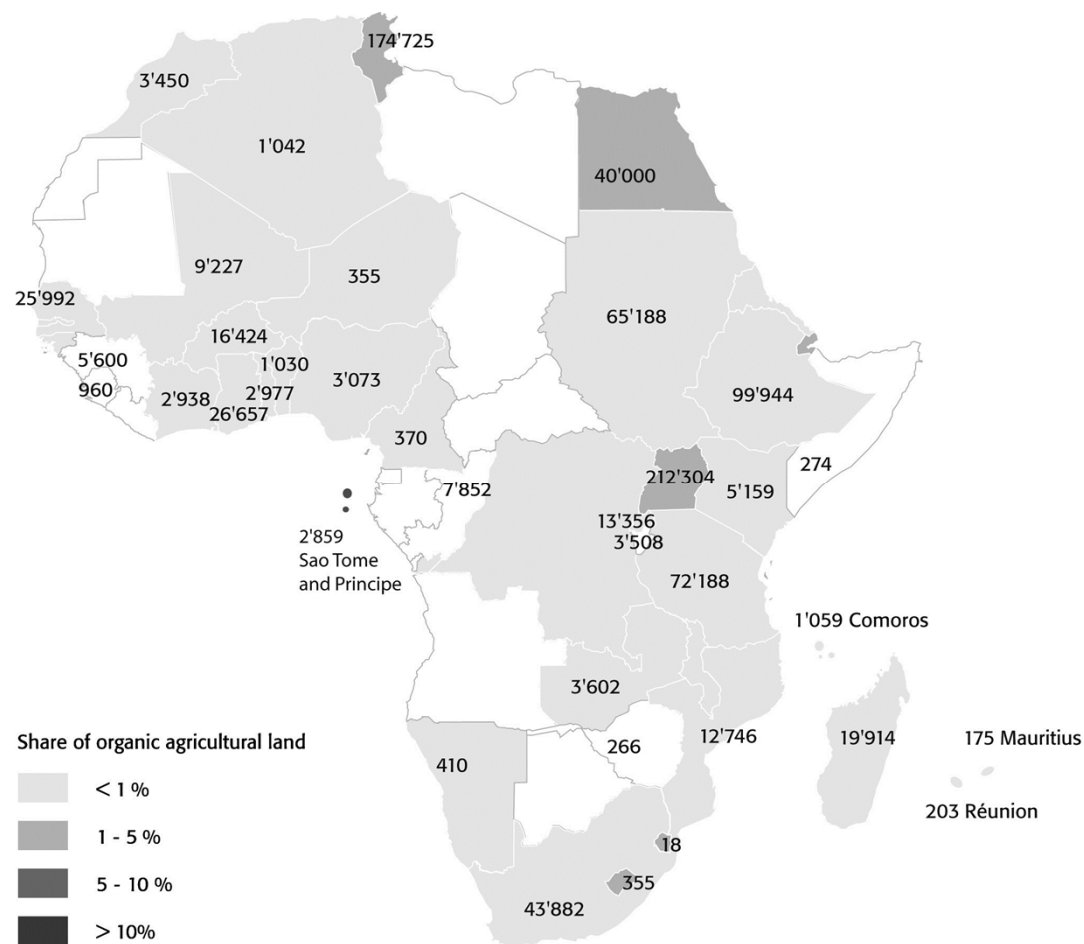


Organic wheat area by country 2008



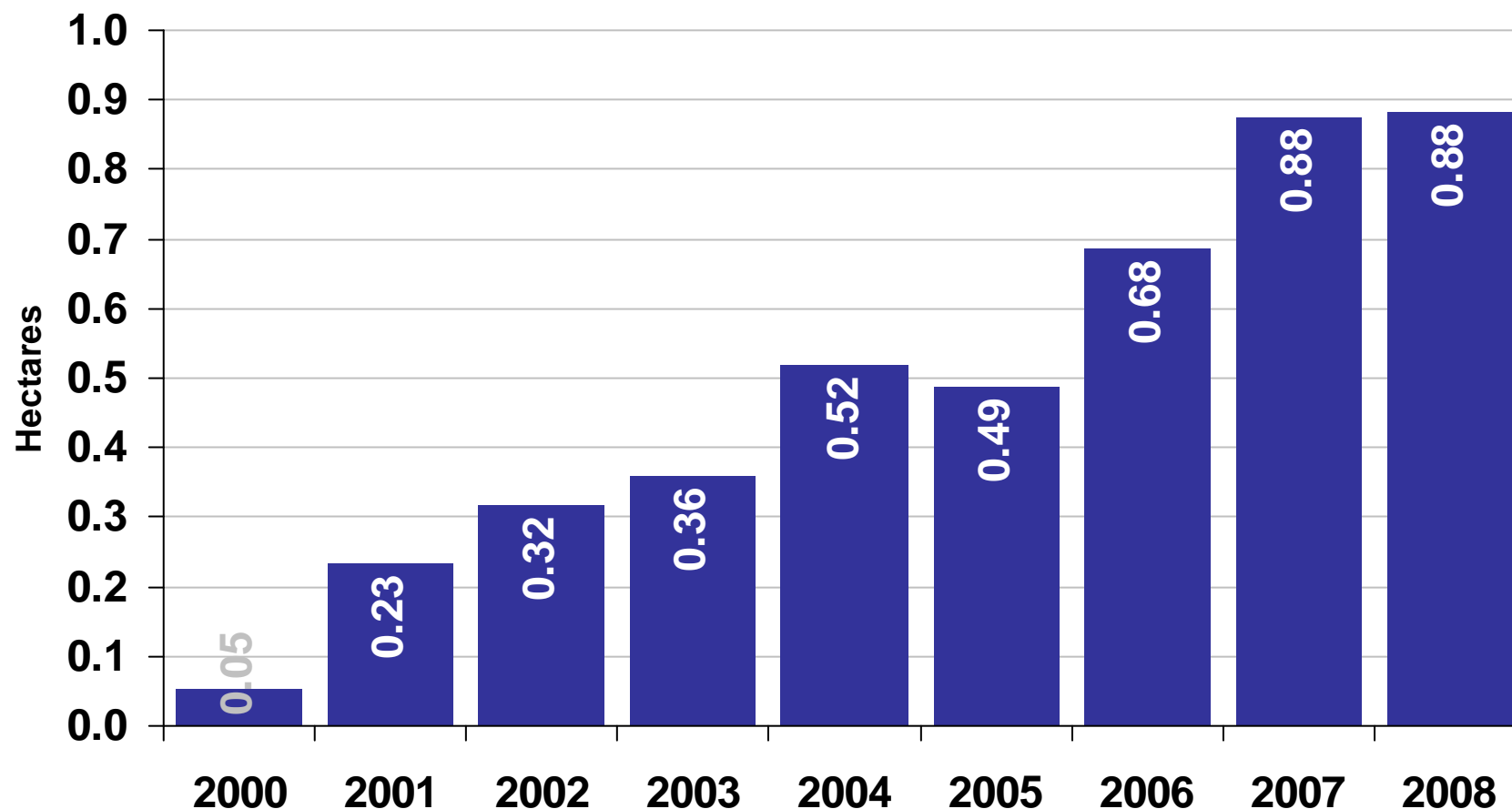
Organic agriculture in the regions

Africa: Land under organic agricultural management (ha) in the countries of Africa 2008



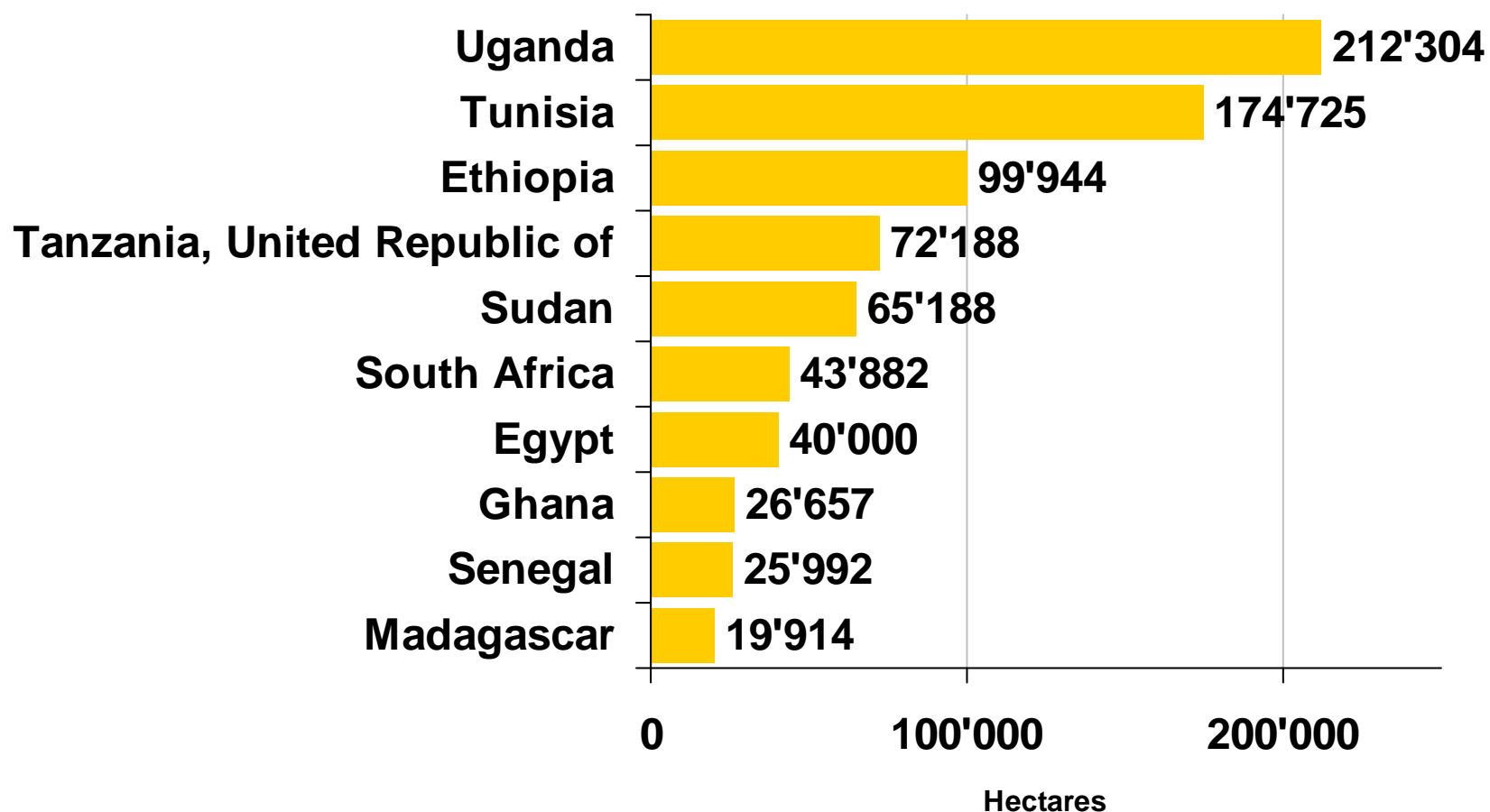
Source: IFOAM and FiBL Survey 2010

Africa: Development of organic agricultural land 2000-2008

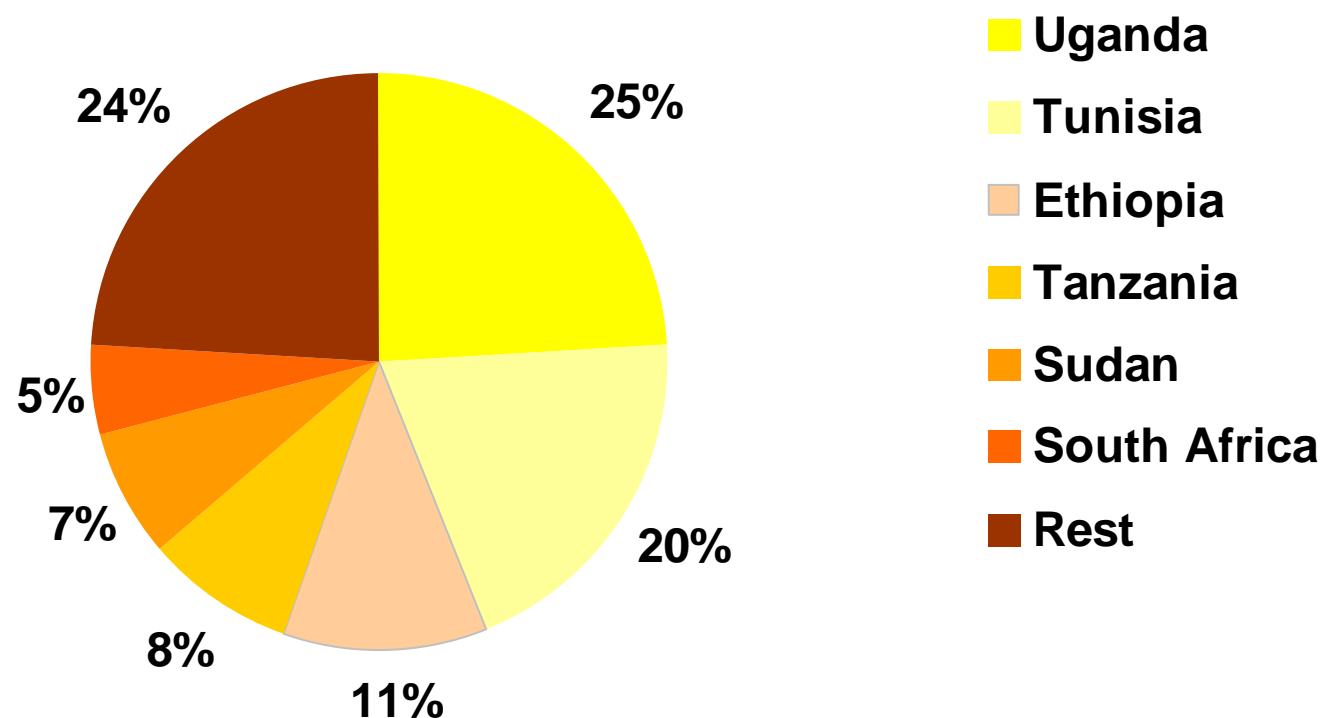


Source: IFOAM, FiBL and SOEL, survey 2000-2010

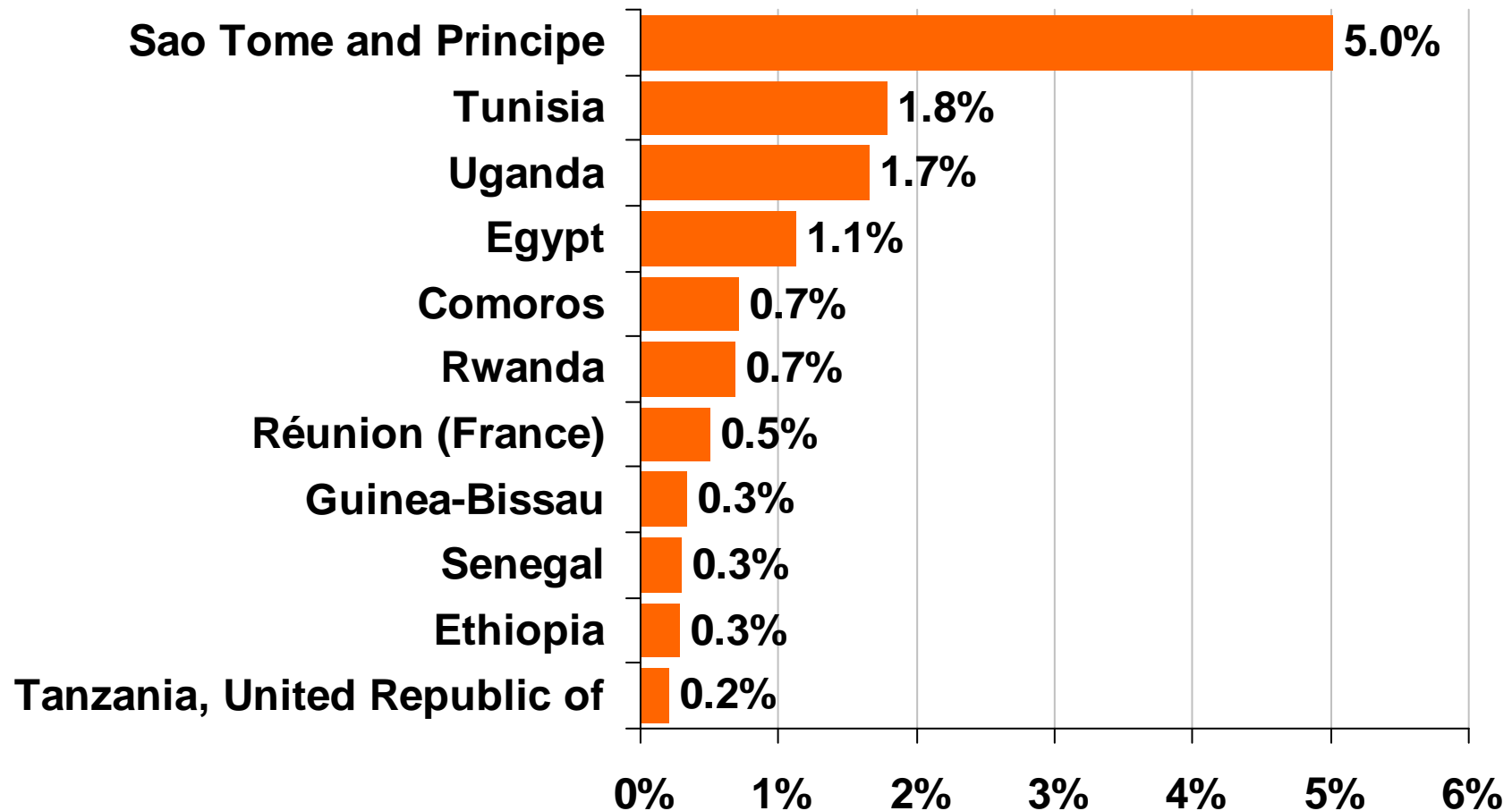
Africa: The ten countries with the most organic agricultural land 2008



Africa: Distribution of organically managed agricultural land by country 2008 (total: 881'000 ha)



Africa: The ten countries with the highest shares of organic agricultural land 2008

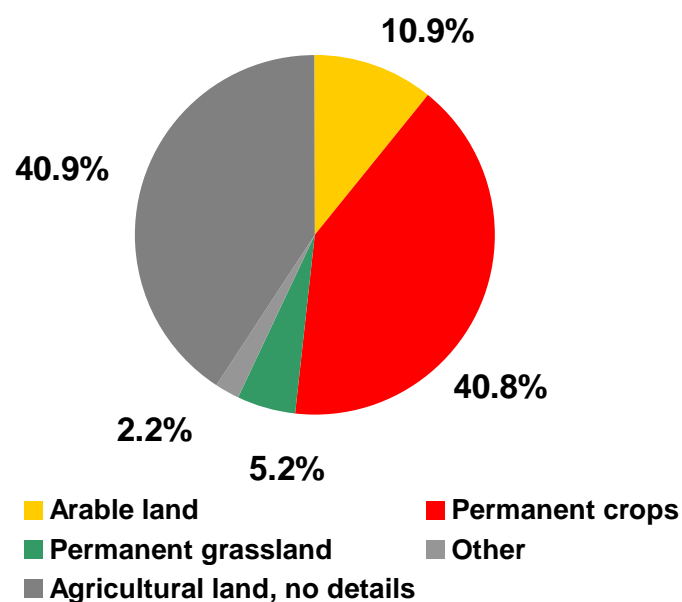


Africa: Use of organic agricultural land 2008

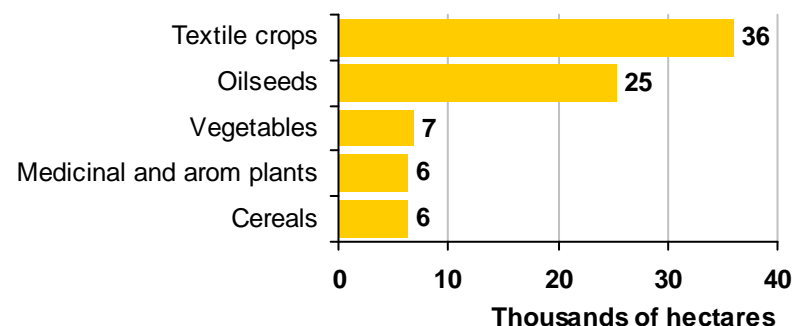
(total: 0.9 million hectares)

(Revision date: March 5, 2010)

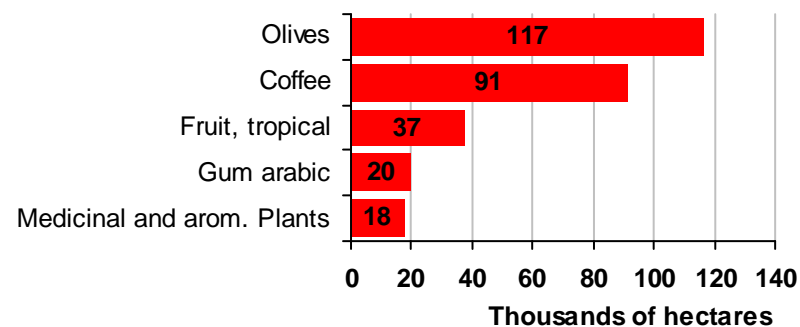
Distribution of main agricultural land use types 2008



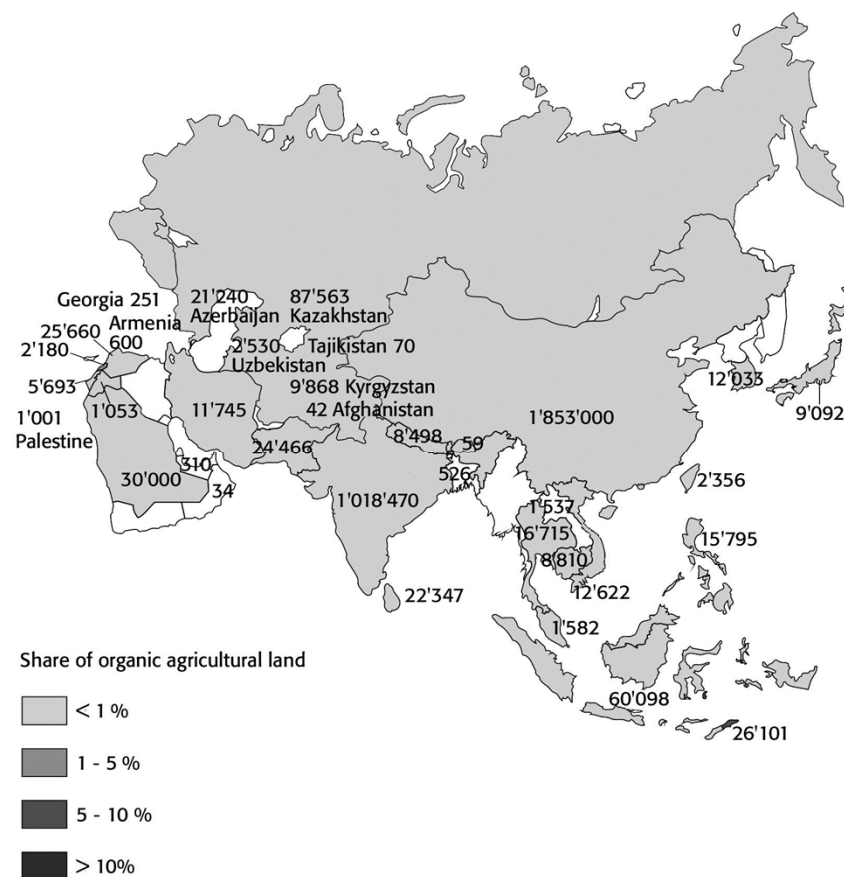
The main arable crops 2008



The main permanent crops 2008

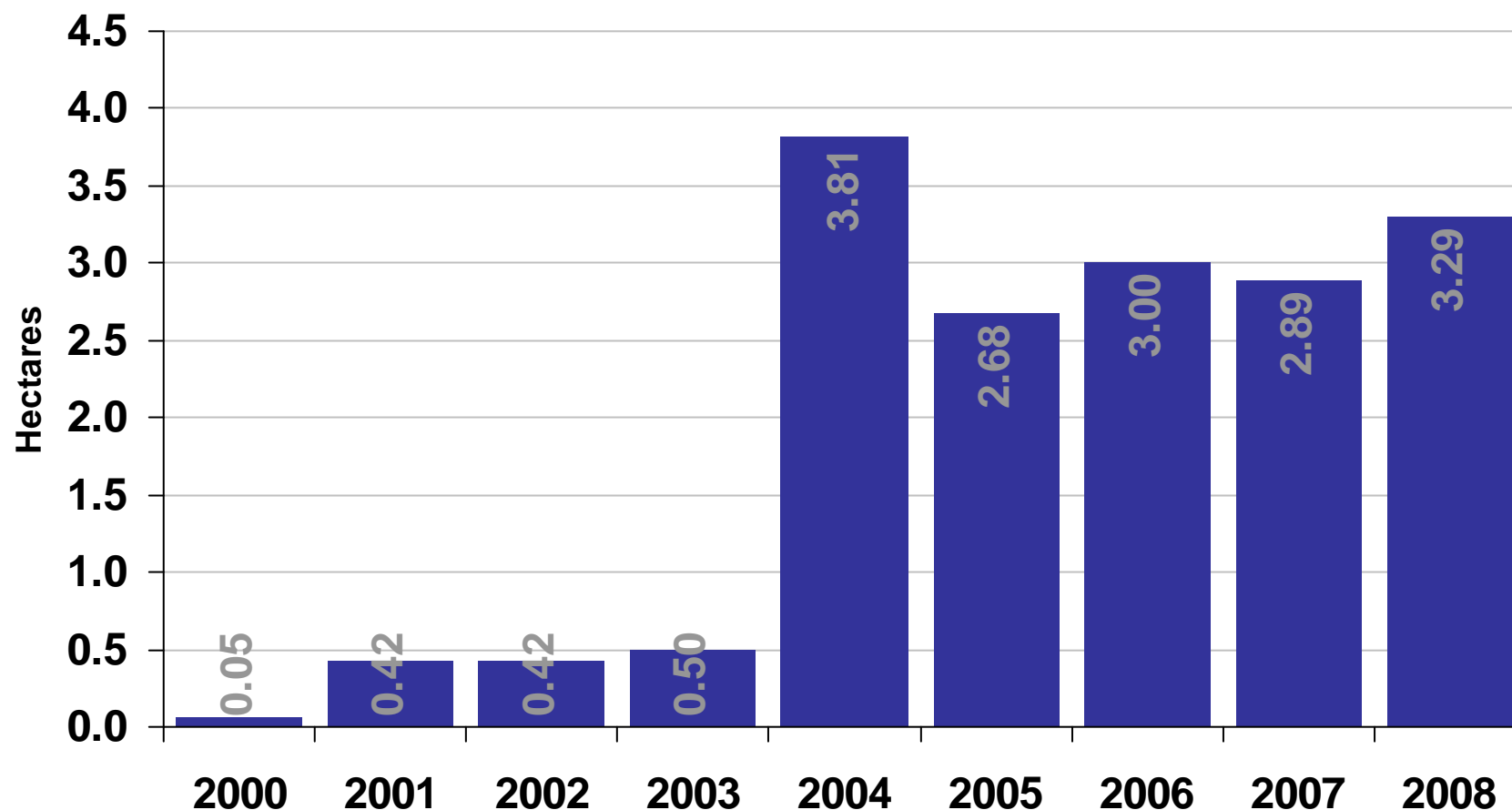


Asia: Land under organic agricultural management (ha) in the countries 2008



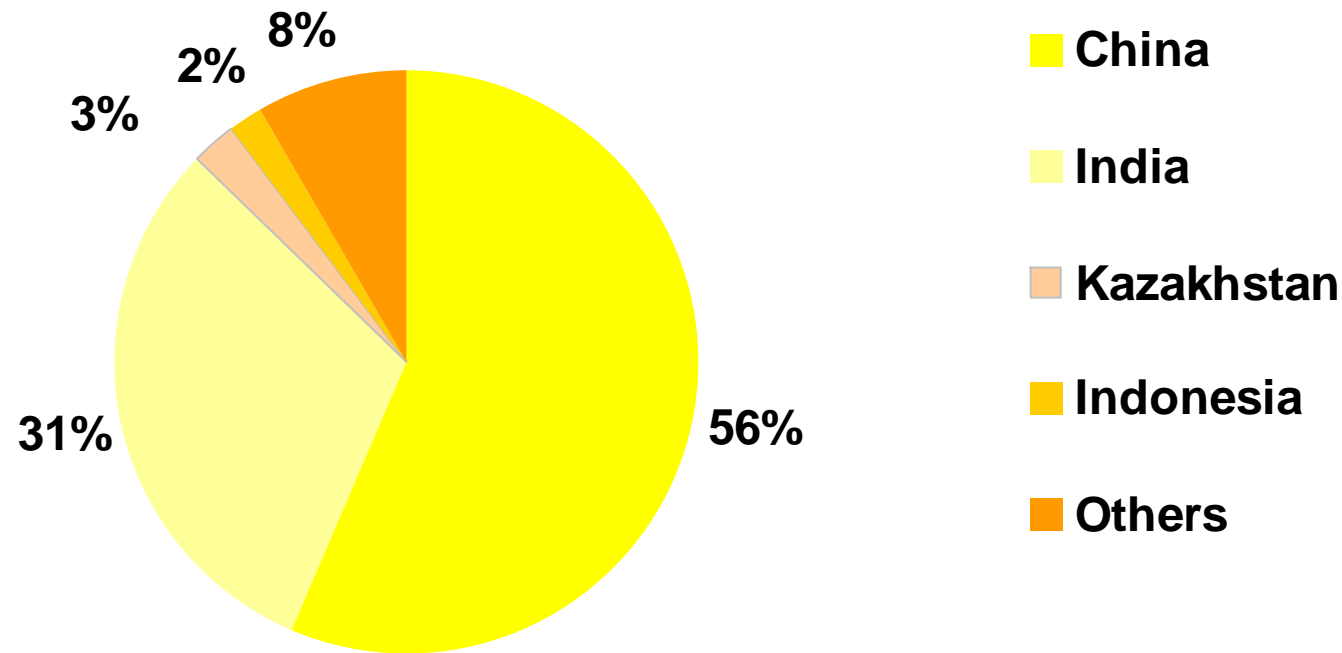
Source: FiBL Survey 2010

Asia: Development of organic agricultural land 2000-2008

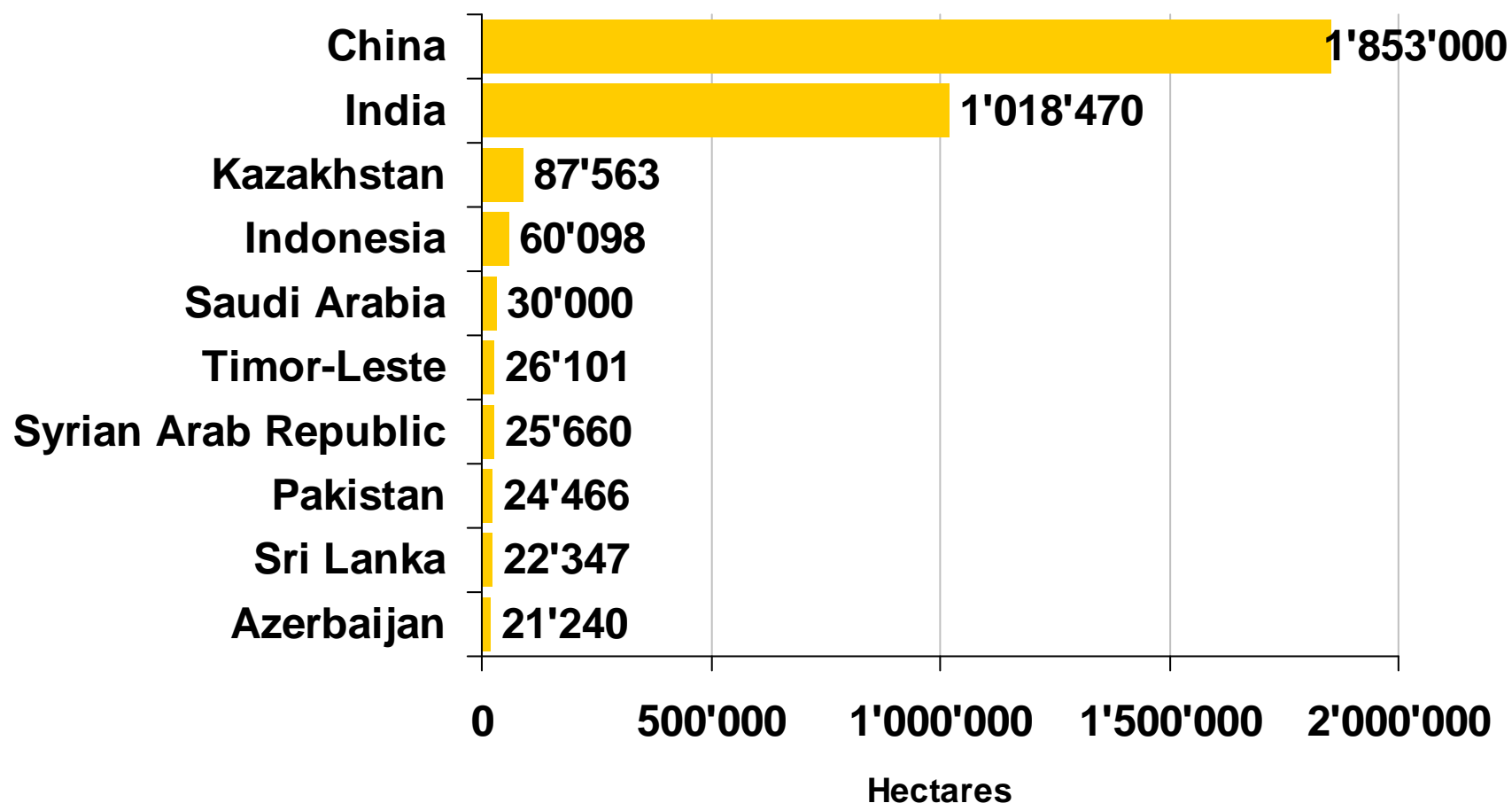


Source: FiBL Survey 2010

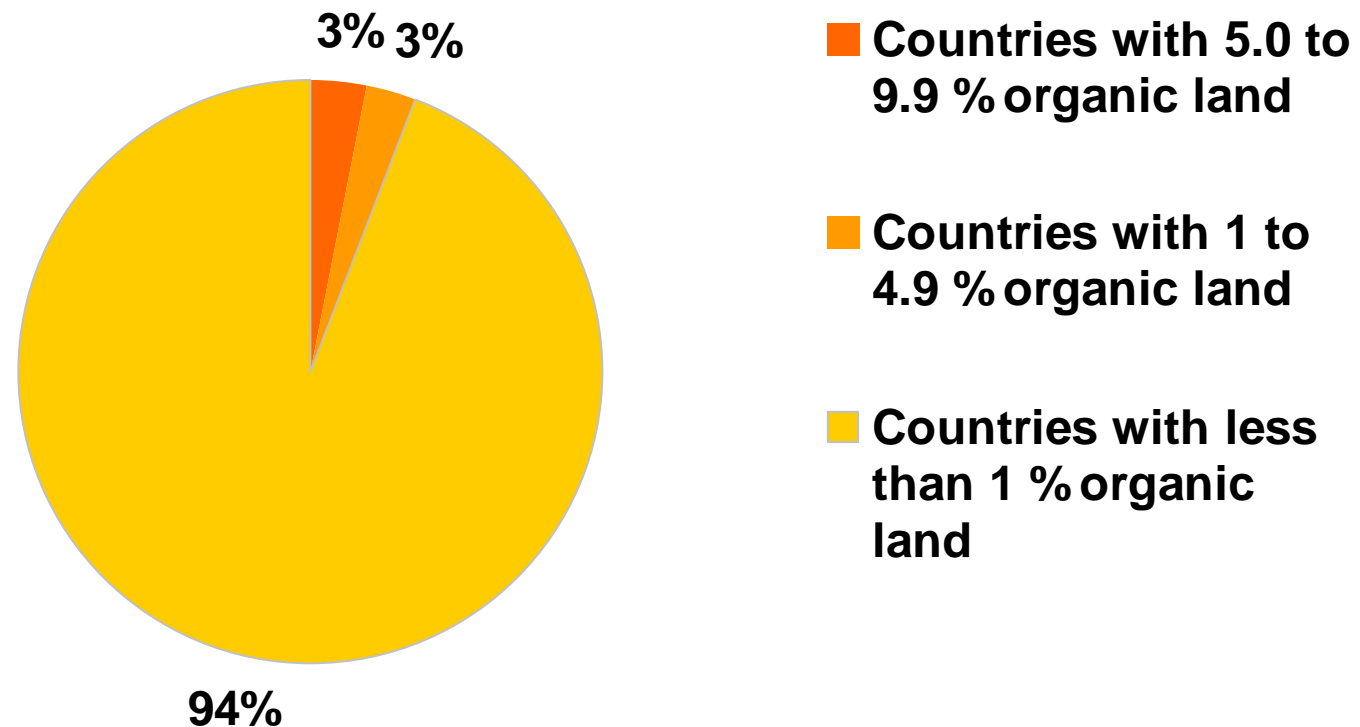
Asia: Distribution of organically managed agricultural land by country 2008; total: 3.3 million hectares



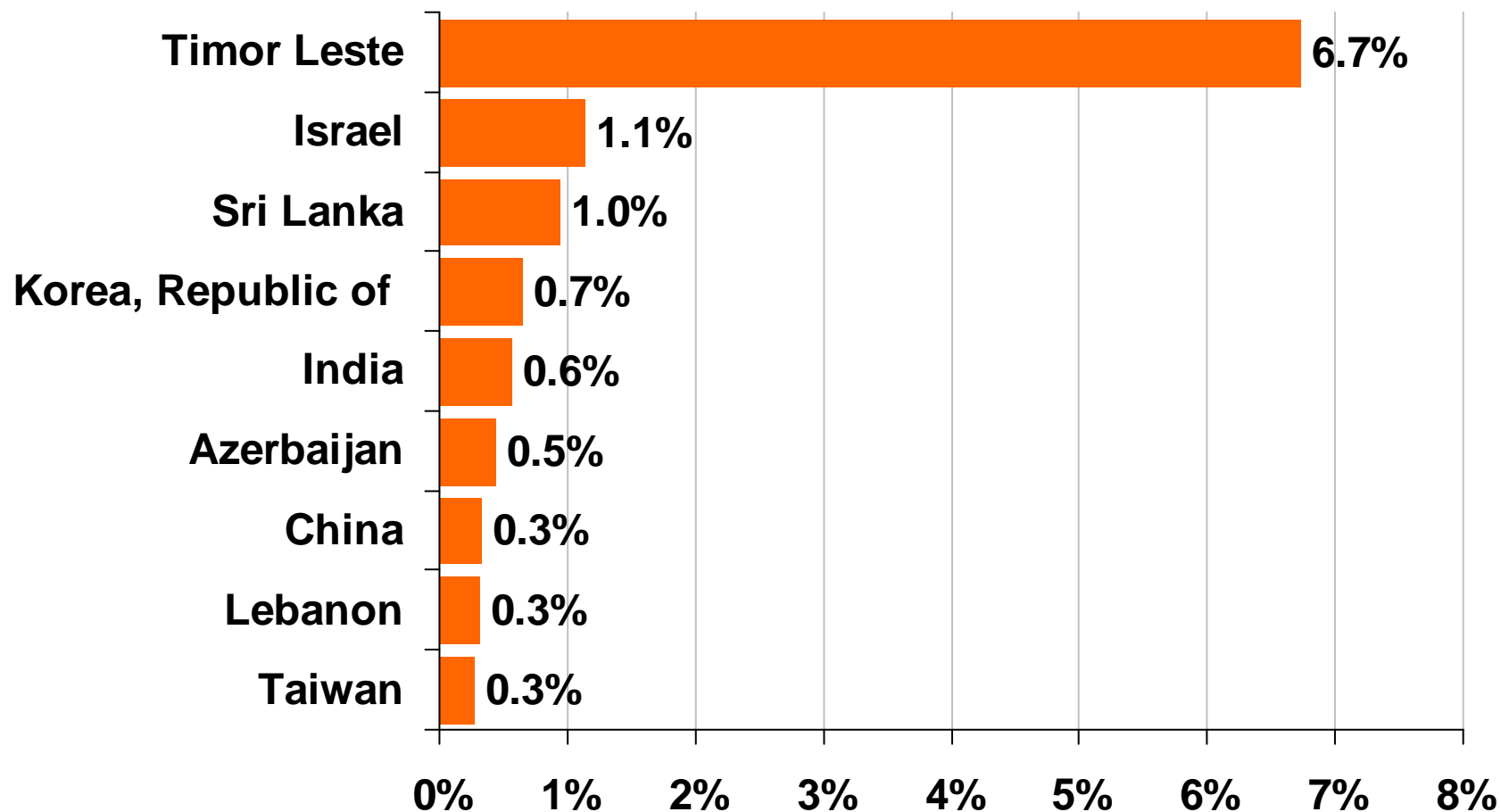
Asia: The ten countries with the most organic agricultural land 2008



Asia: Distribution of shares of organic land 2008



Asia: The ten countries/territories with the highest shares of organic agricultural land 2008

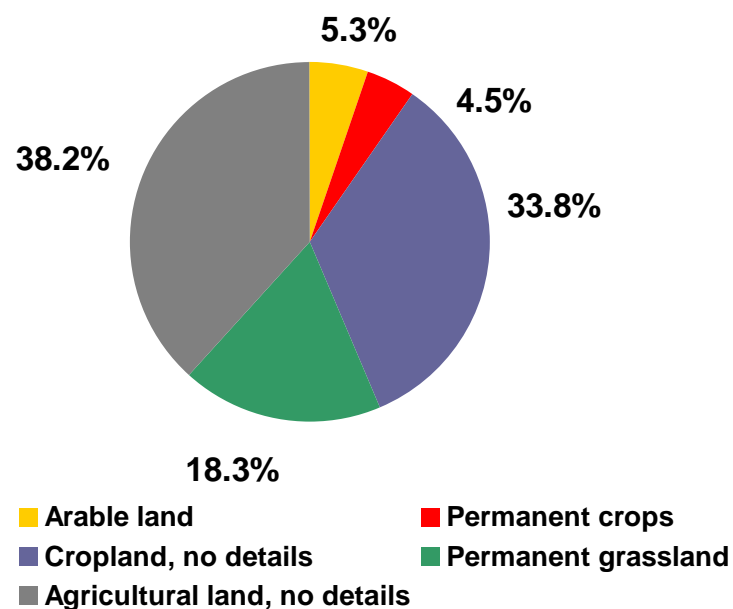


Asia: Use of organic agricultural land 2008

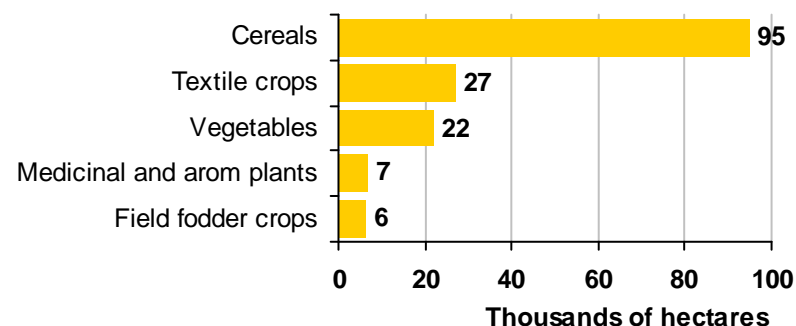
(total: 3.3 million hectares)

(Revision date: March 5, 2010)

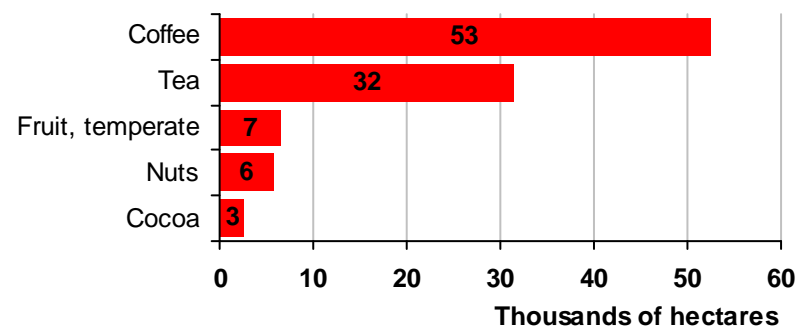
Distribution of main agricultural land use types 2008



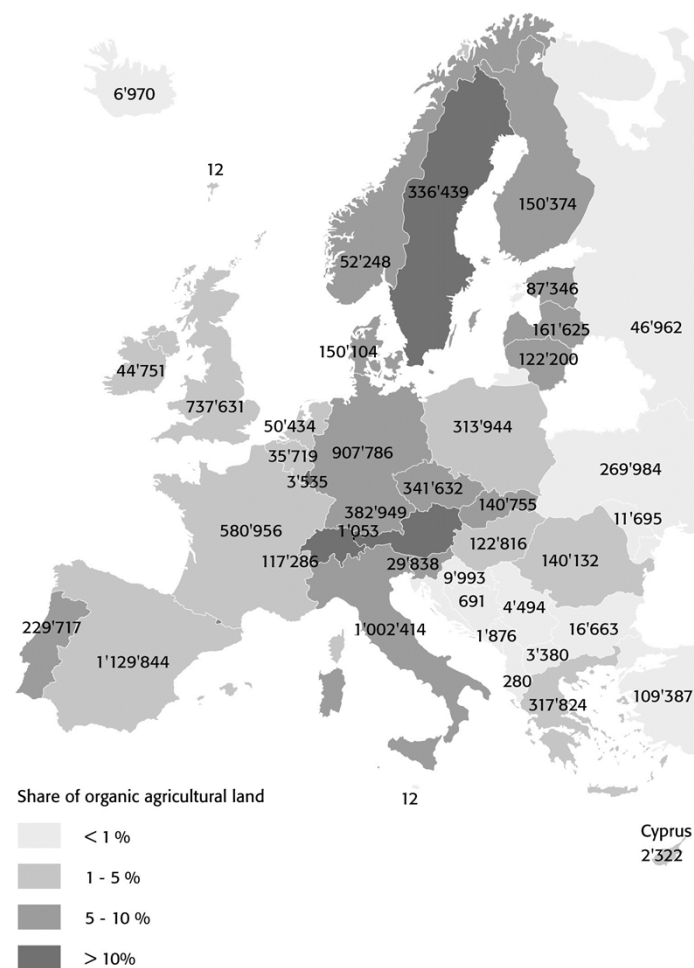
The main arable crops 2008



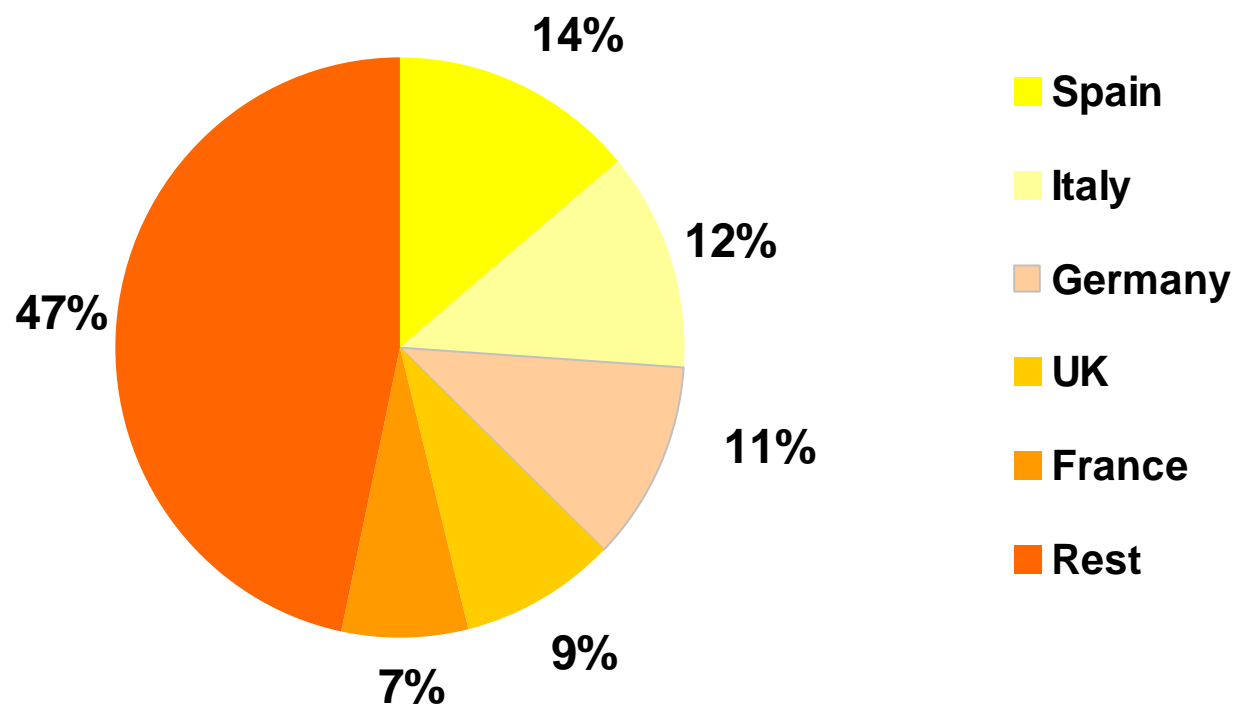
The main permanent crops 2008



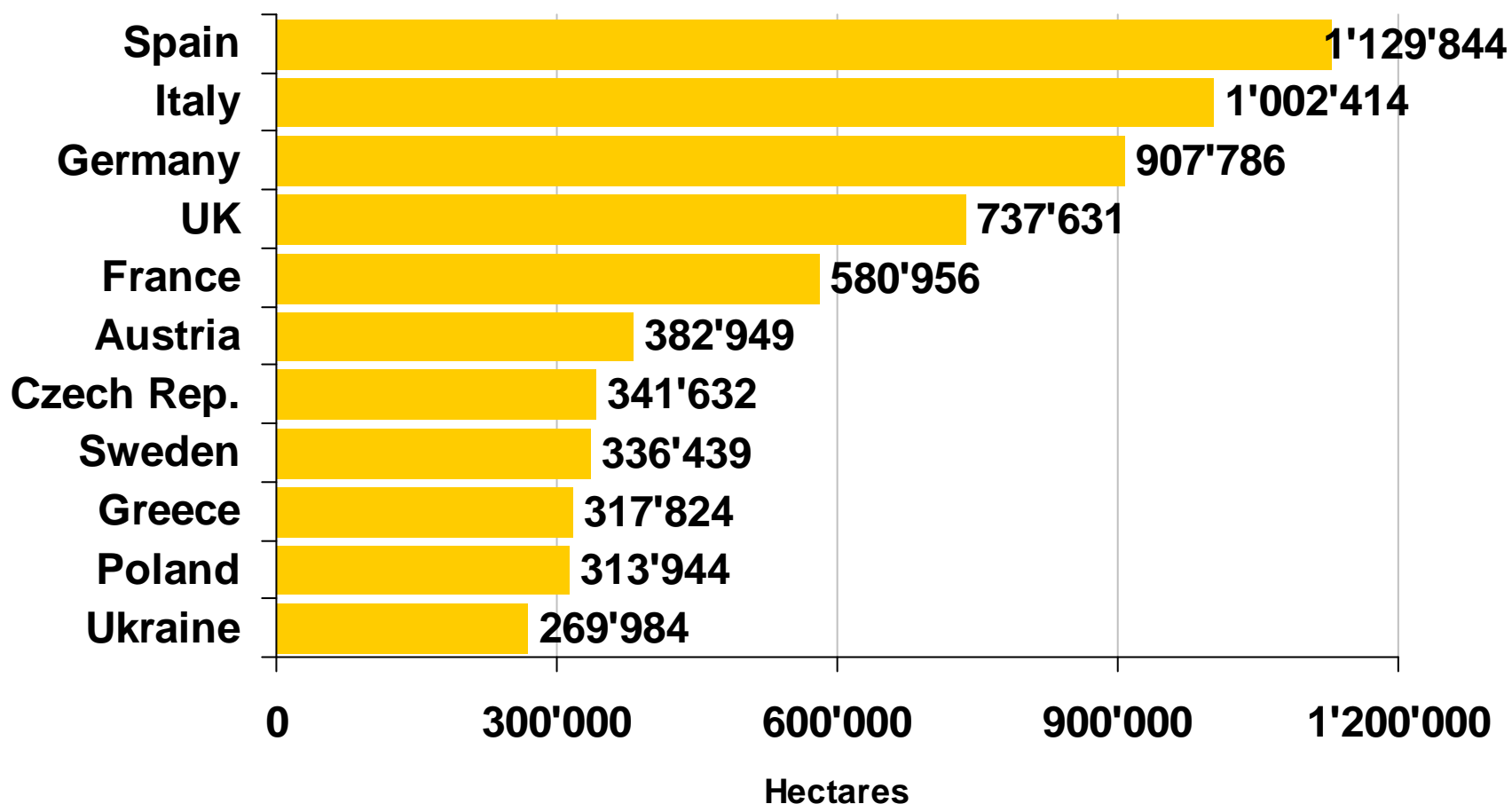
Land under organic agricultural management in the countries of Europe 2008



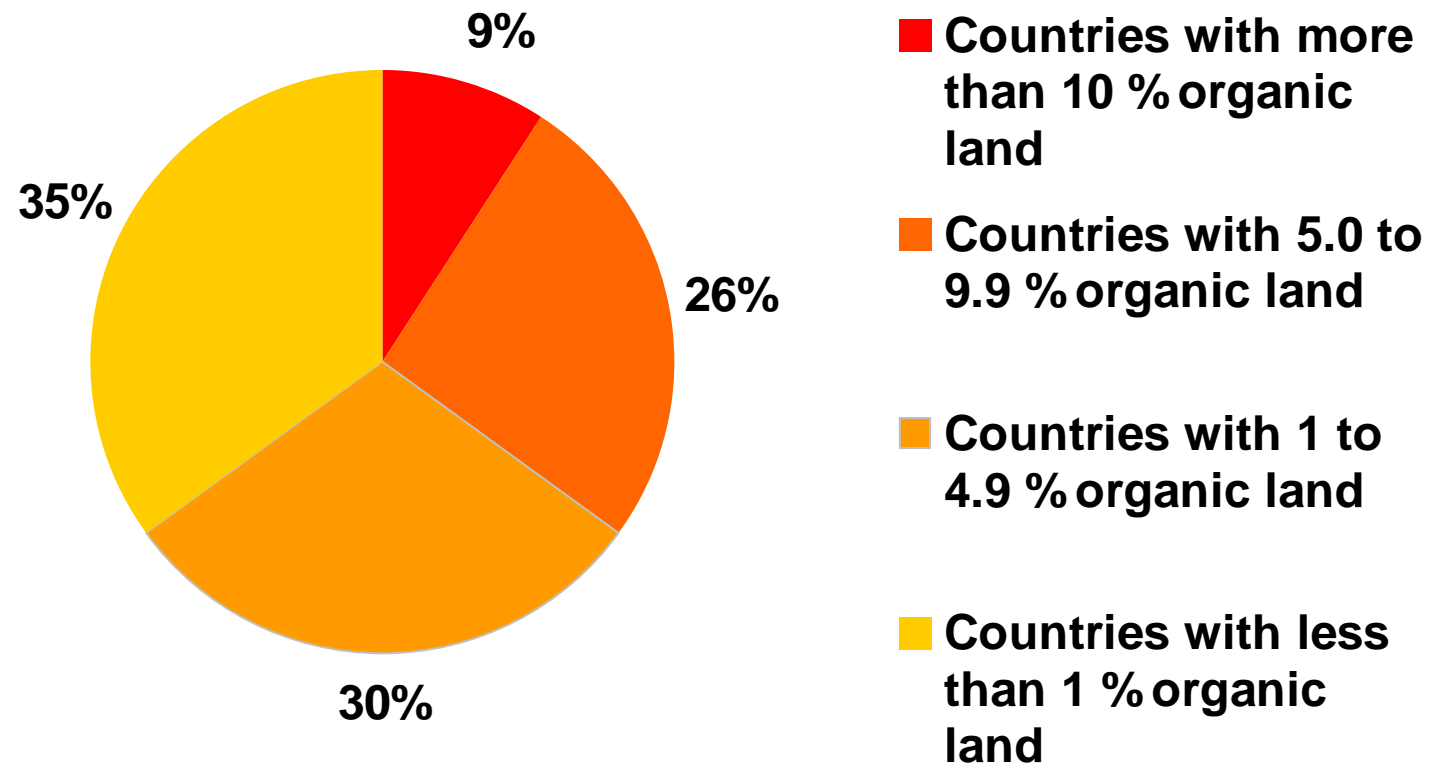
Europe: Distribution of organically managed agricultural land by country 2008 (Total: 8.2 million hectares)



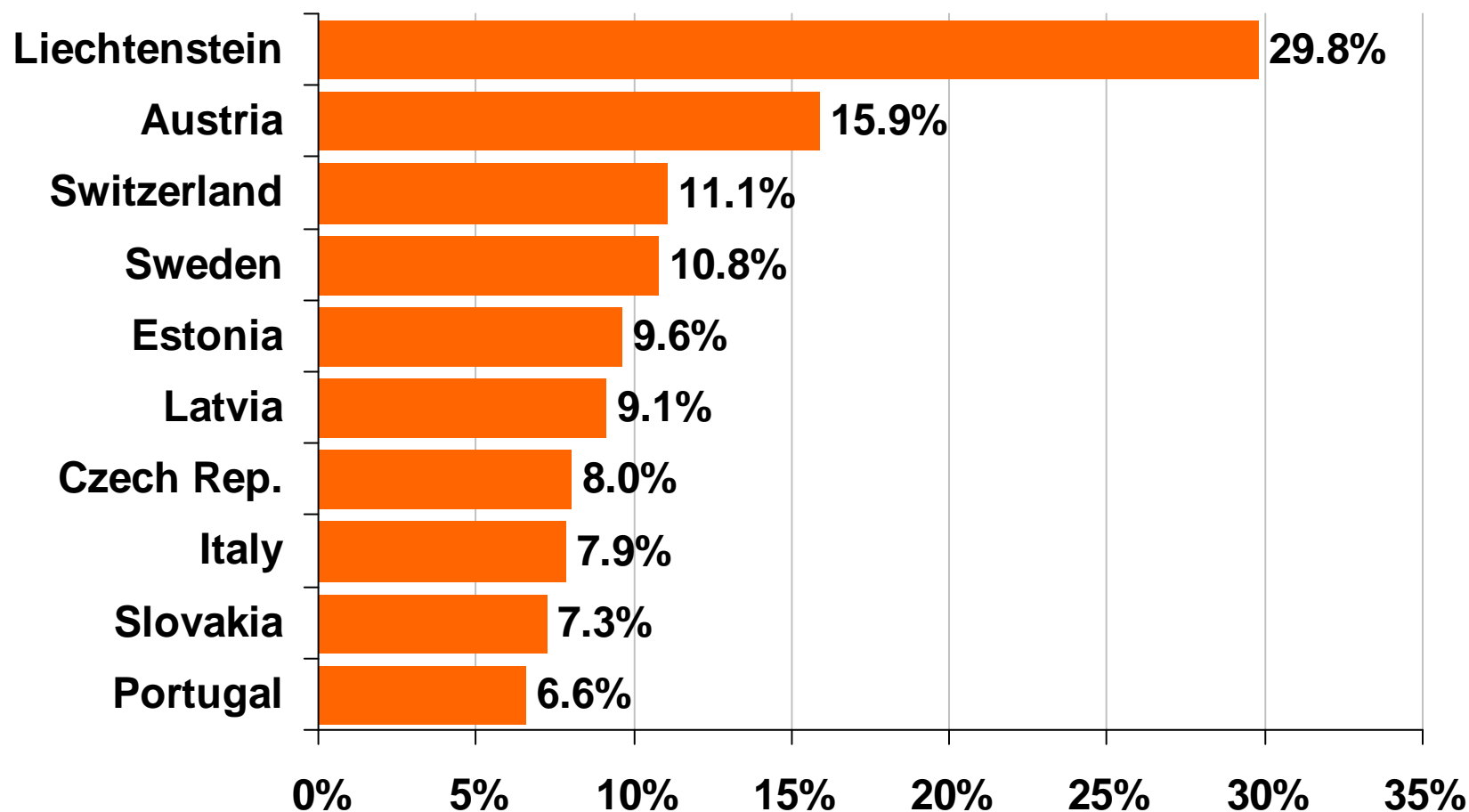
Europe: The ten countries with the most organic agricultural land 2008



Europe: Distribution of the shares of organic agricultural land 2008

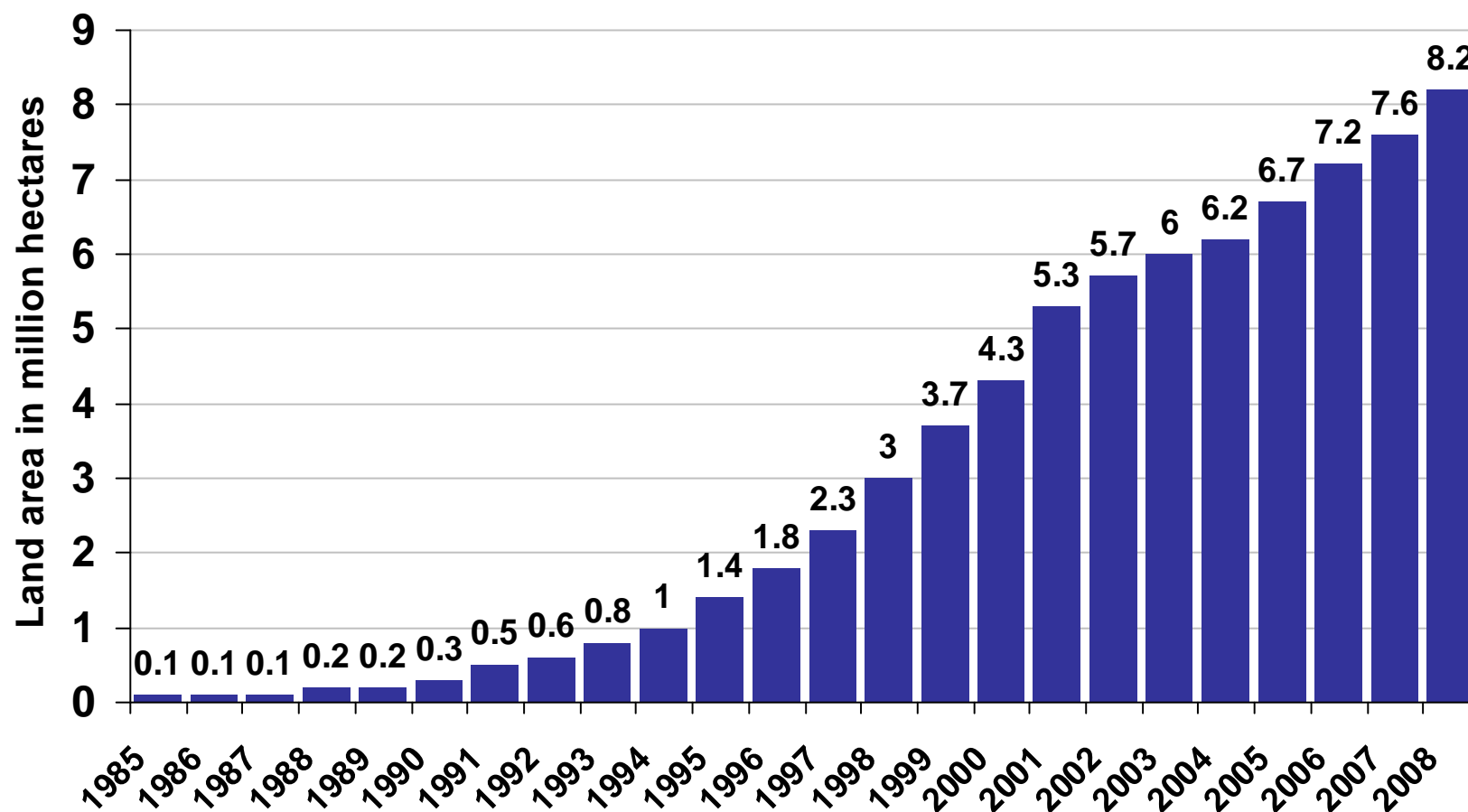


Europe: The ten countries with the highest shares of organic agricultural land 2008



Source: FiBL & AMI Survey 2010

Development of the organic agricultural land in Europe 1985-2008

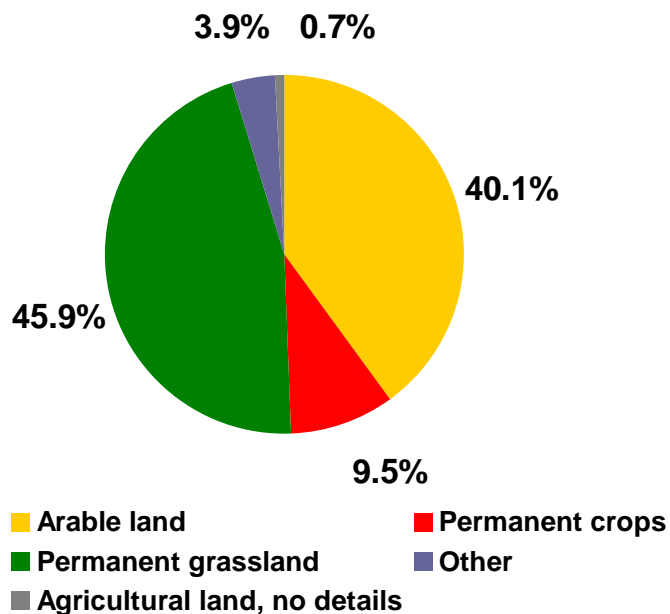


Source: FiBL, Aberystwyth University, AMI/ZMP

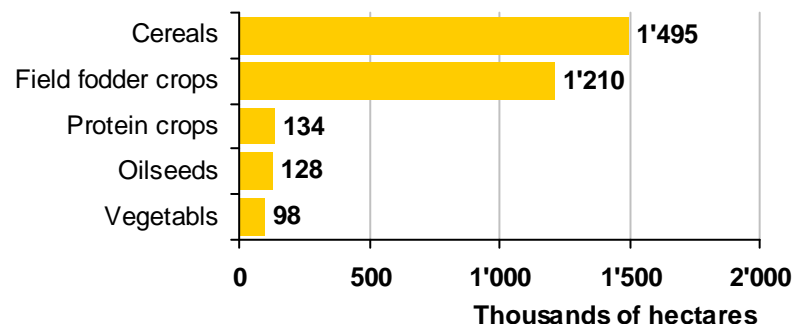
Europe: Use of organic agricultural land 2008 (total: 8.2 million hectares)

(Revision date: March 5, 2010)

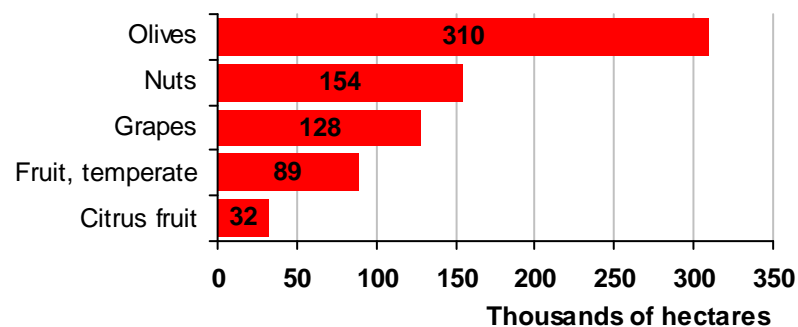
Distribution of main agricultural land use types 2008



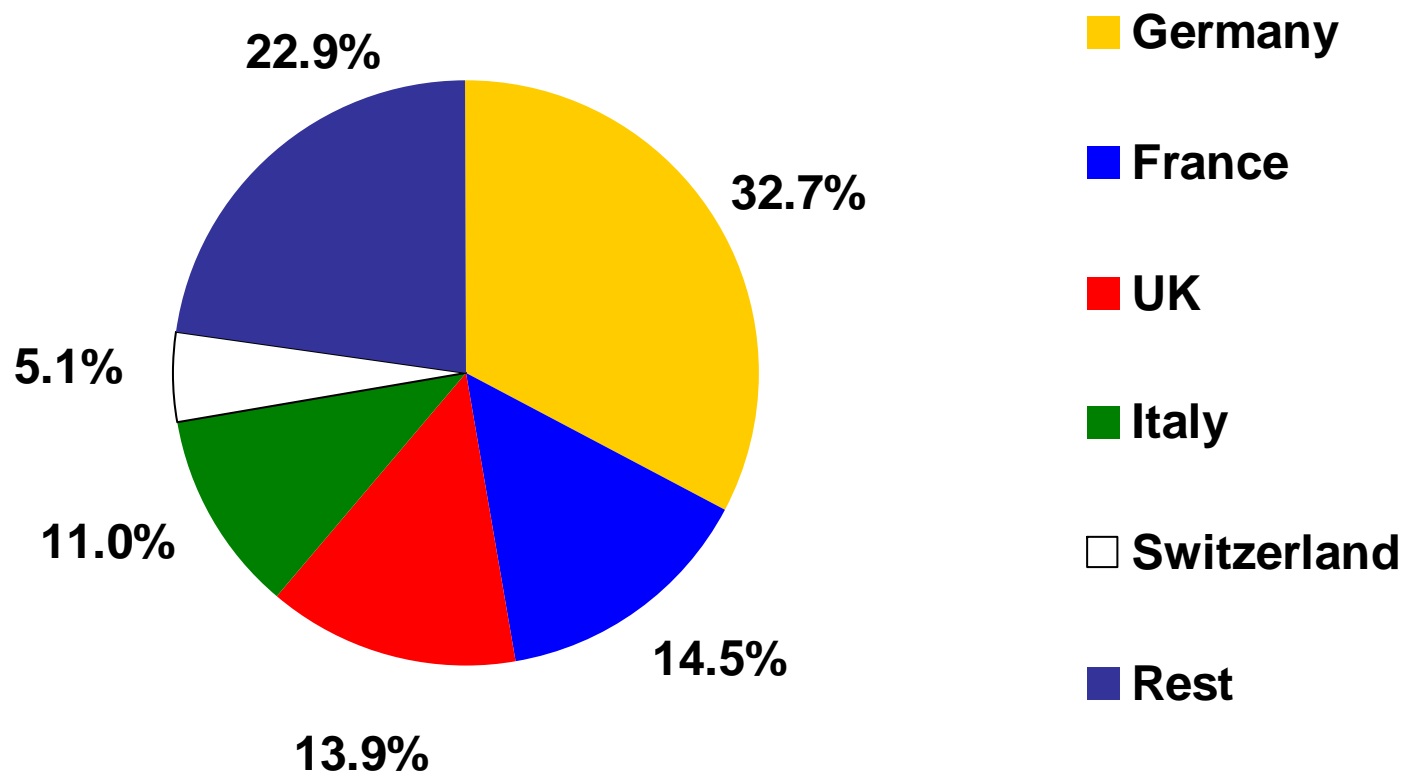
The main arable crops 2008



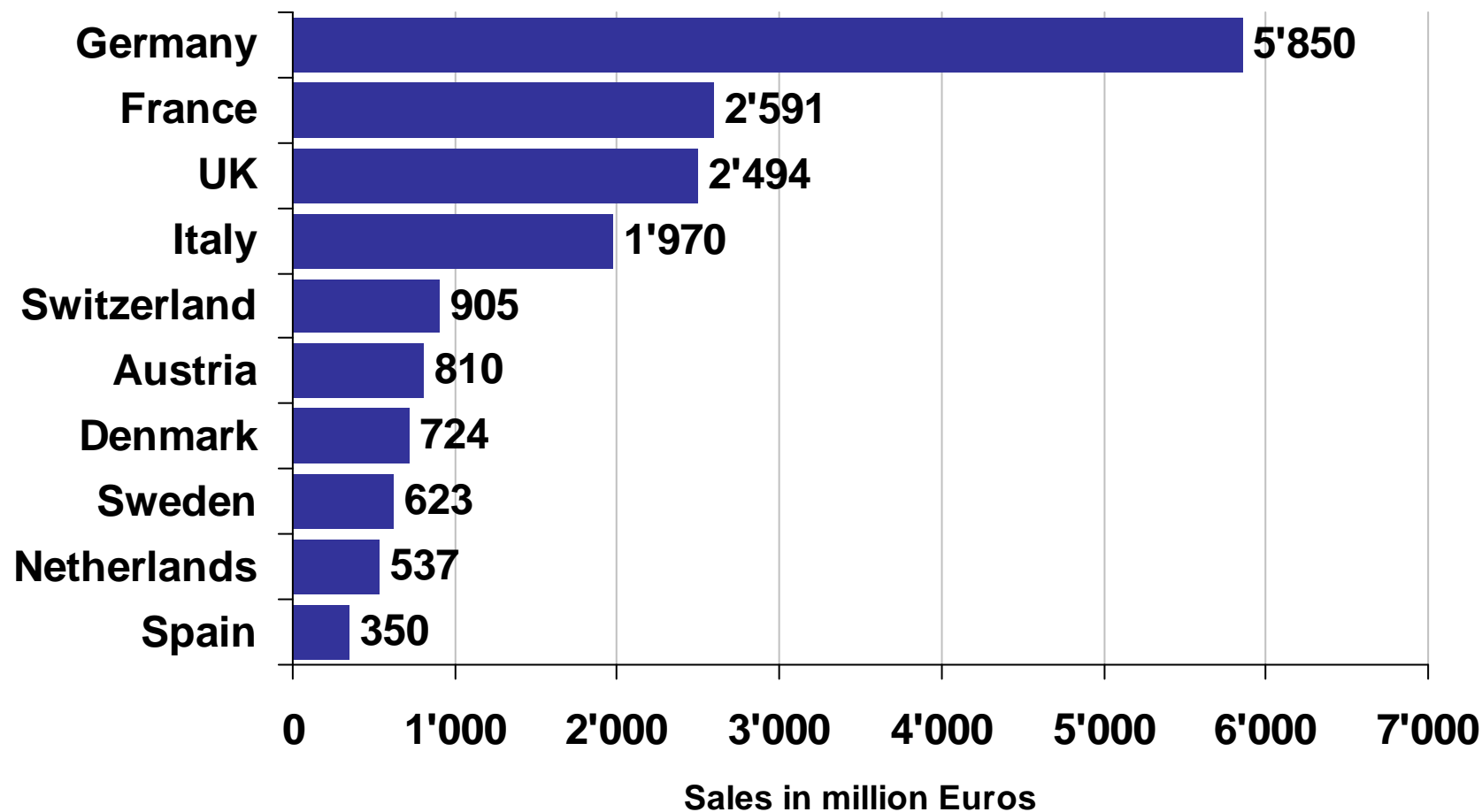
The main permanent crops 2008



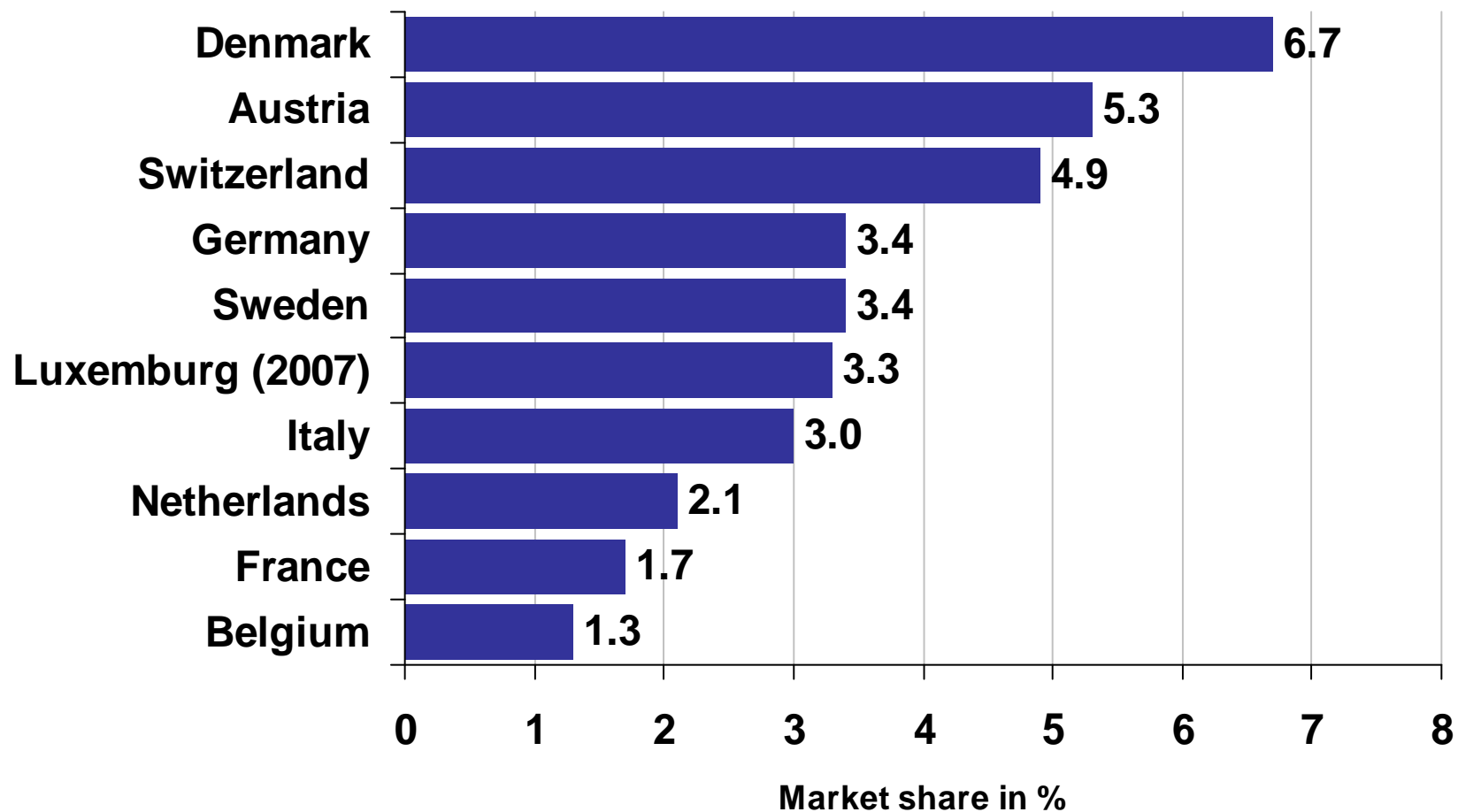
Europe: Distribution of sales of organic food and drink by country 2008 (total: 18 billion Euros)



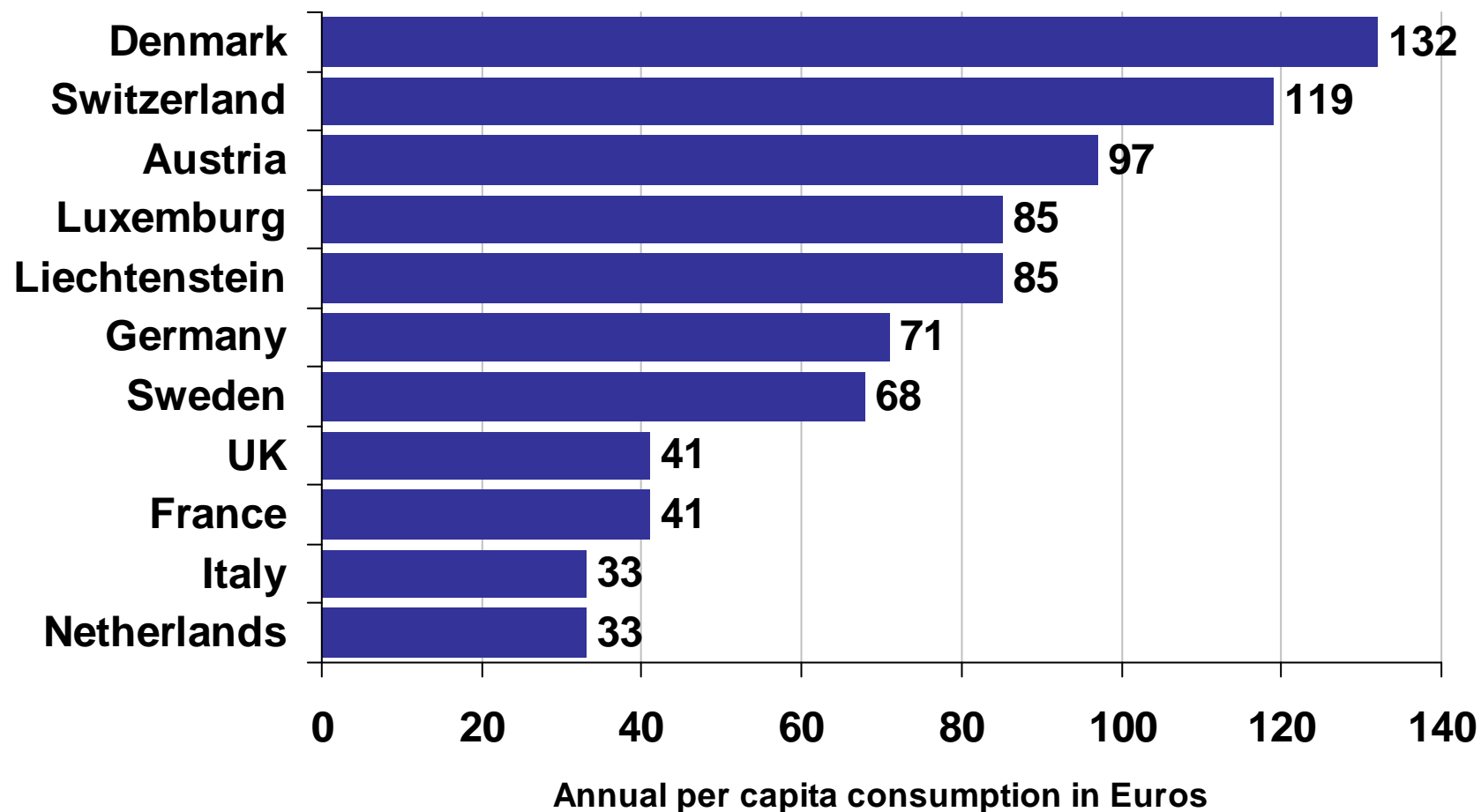
The European market for organic food and drink: The countries with the highest sales 2008



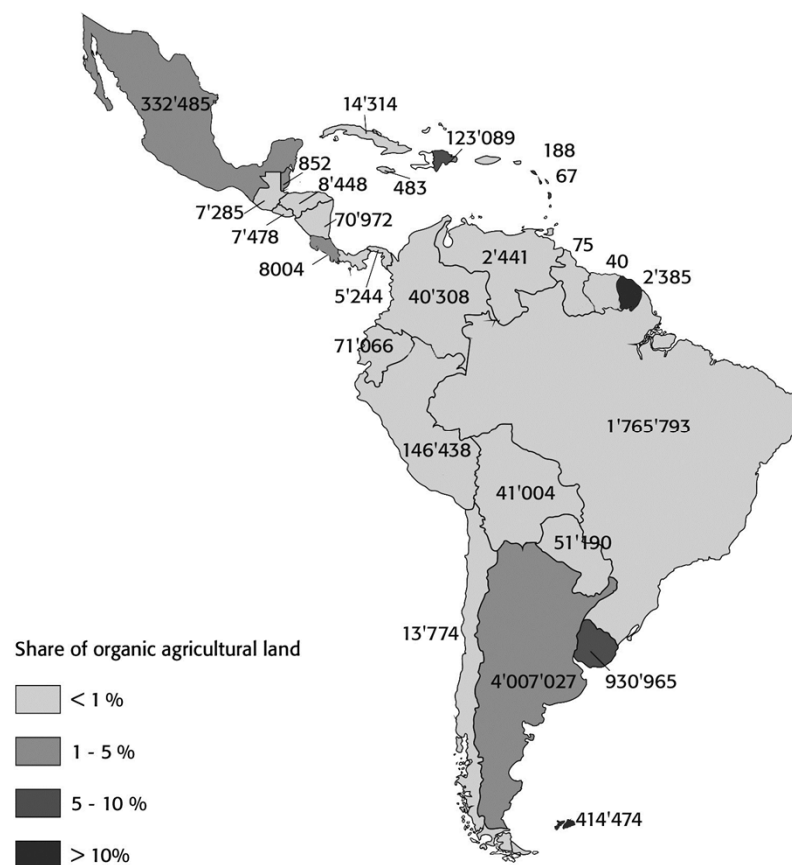
The European organic market for organic food and drink: The countries with the highest shares of organic food sales 2008



The European market for organic food and drink: The countries with the highest per capita consumption 2008

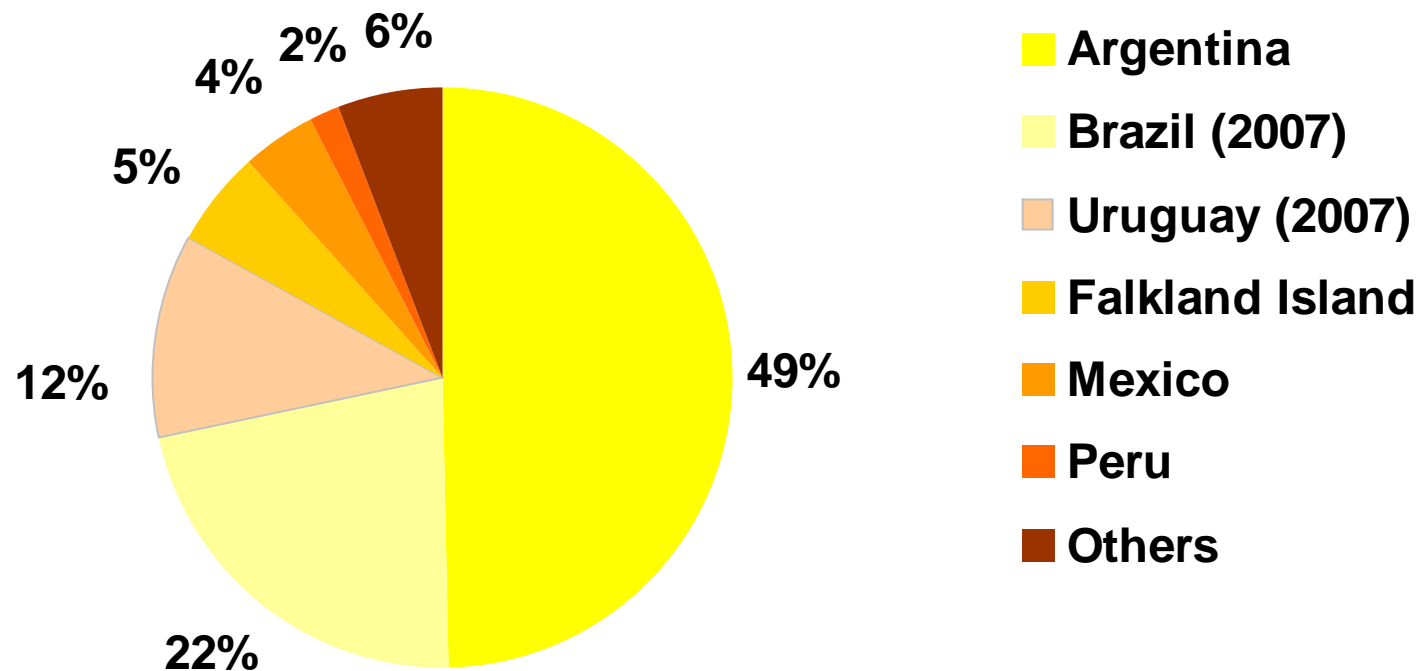


Latin America/Caribbean: Land under organic agricultural management (ha) 2008



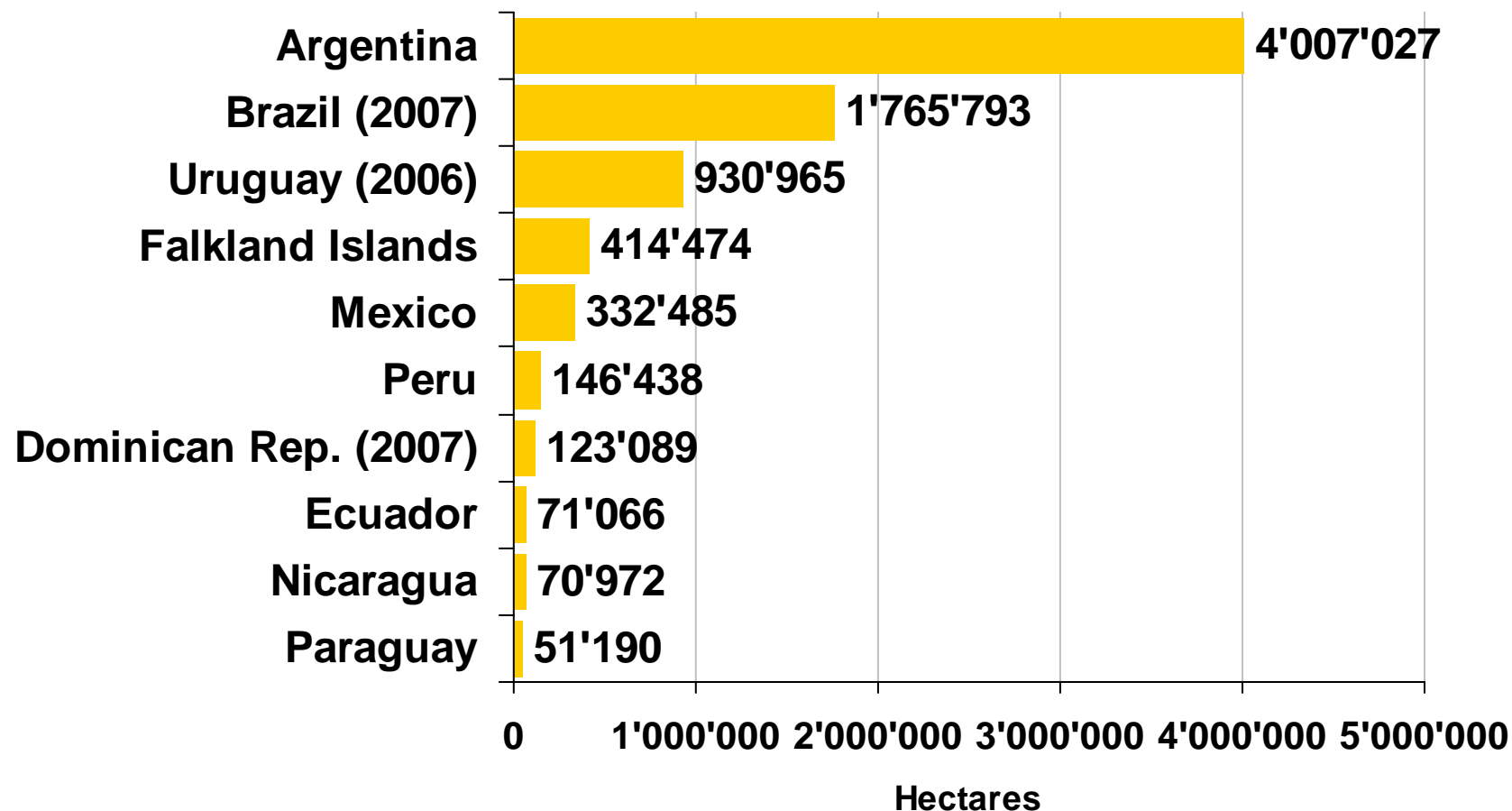
Source: FiBL Survey 2010

Latin America/Caribbean: Distribution of organically managed agricultural land by country 2008 (total: 8.1 million hectares)



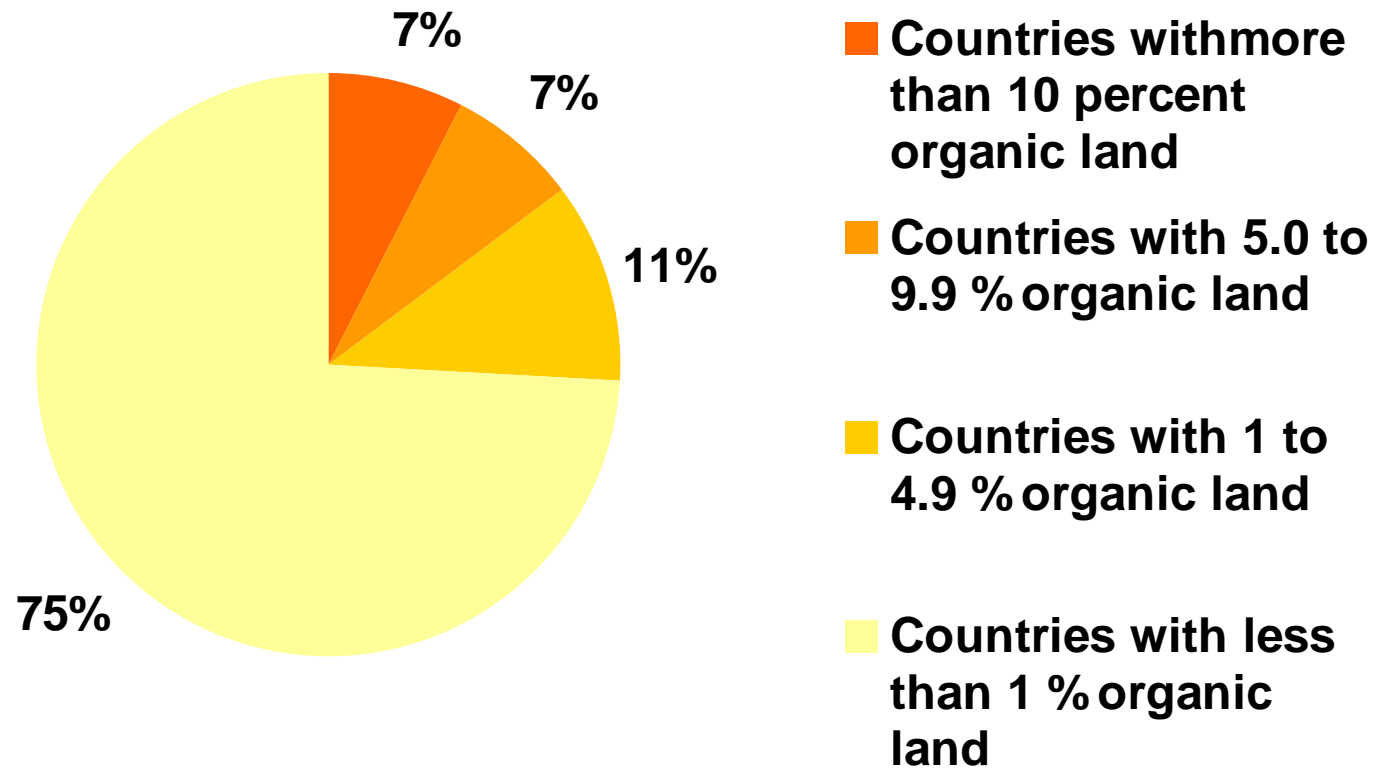
Source: FiBL Survey 2010

Latin America/Caribbean: The ten countries with the most organic agricultural land 2008

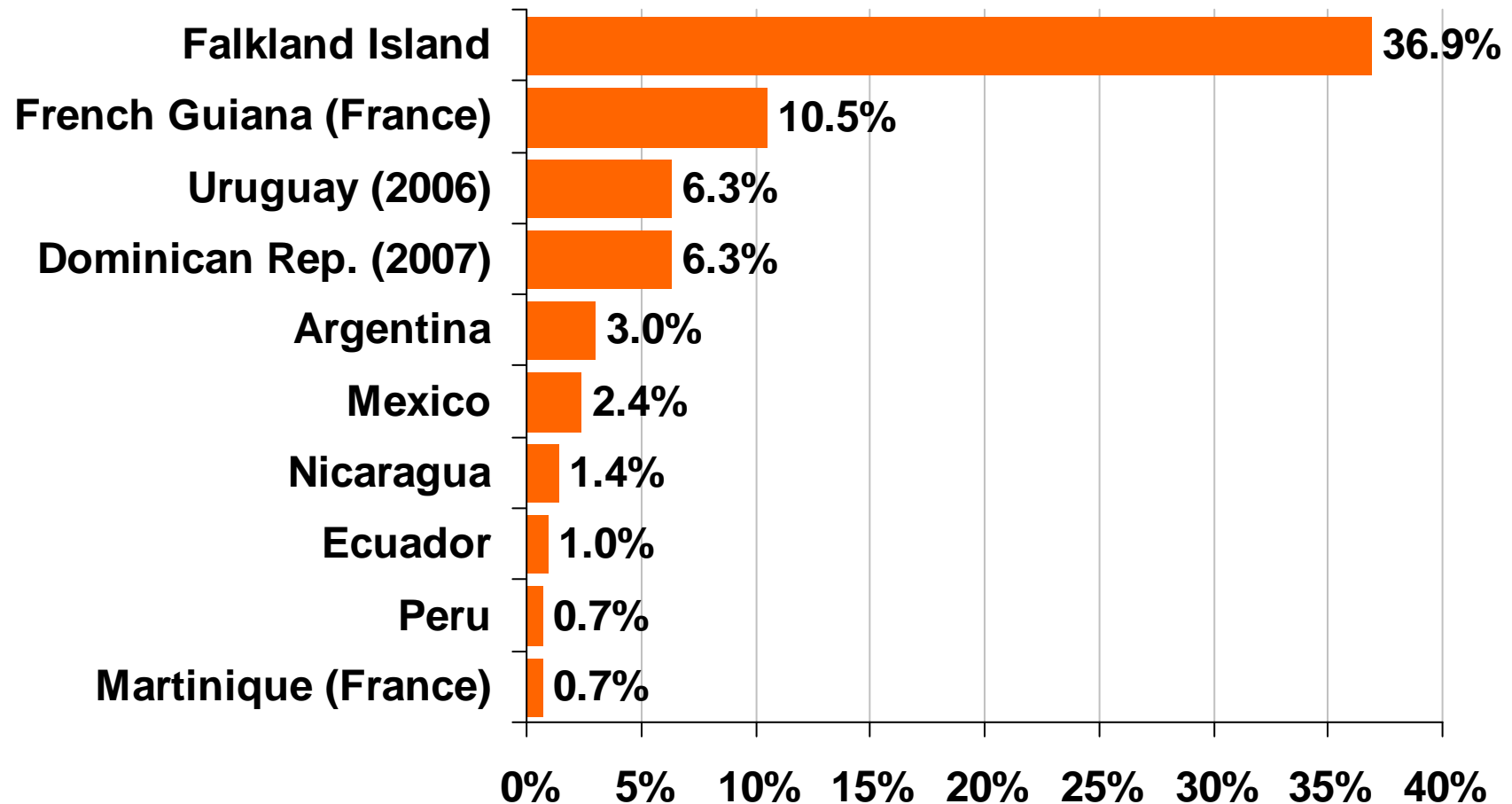


Argentina and Uruguay: Only fully converted area

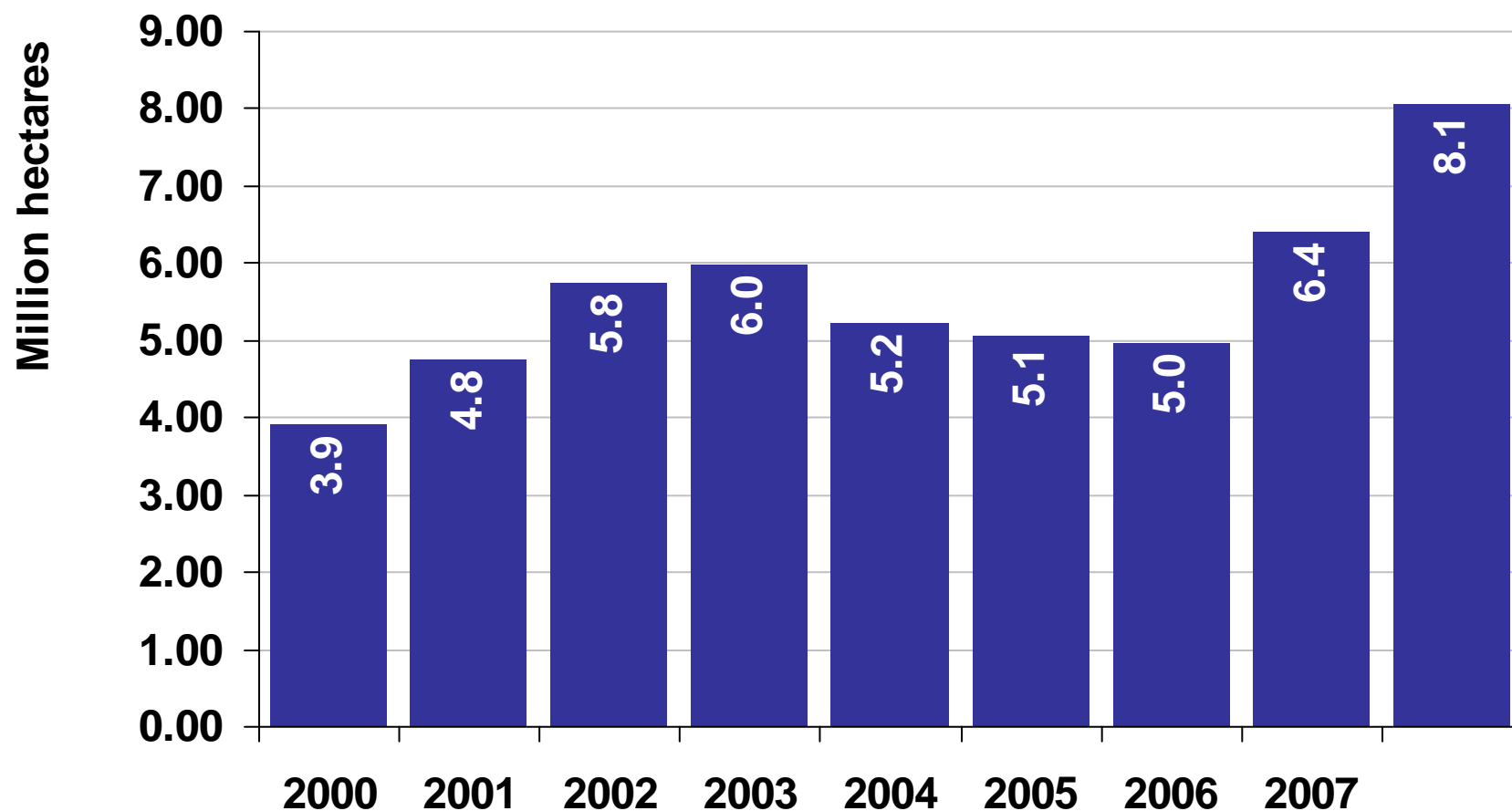
Latin America: Distribution of shares of organic land 2008



Latin America: The ten countries with the highest shares of organic agricultural land 2008



Latin America: Development of organically managed agricultural land 2000-2008



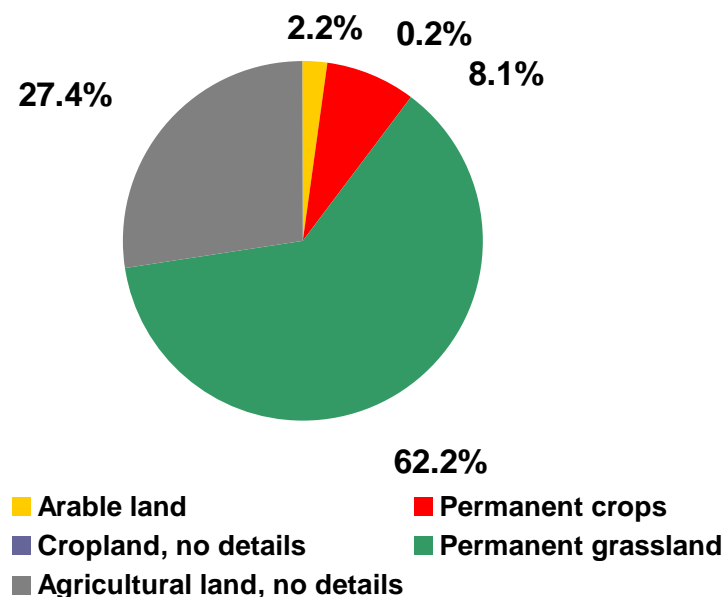
Source: FiBL Survey 2010

Latin America: Use of organic agricultural land 2008

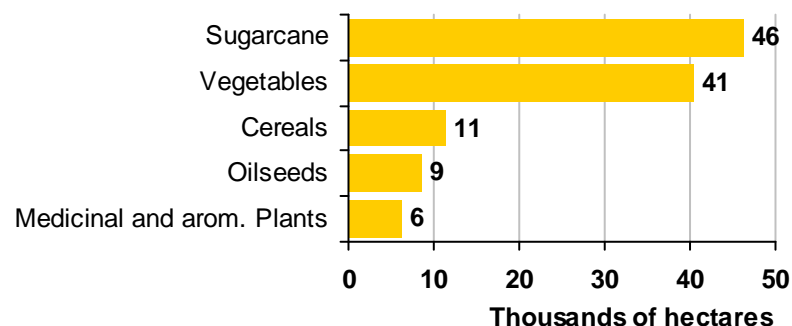
(total: 8.1 million hectares)

(Revision date: March 5, 2010)

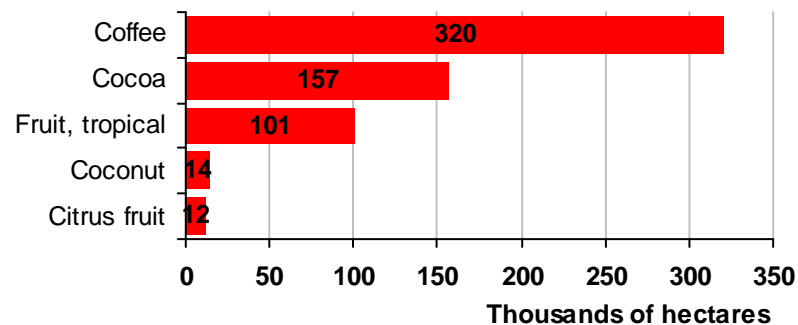
Distribution of main agricultural land use types 2008



The main arable crops 2008



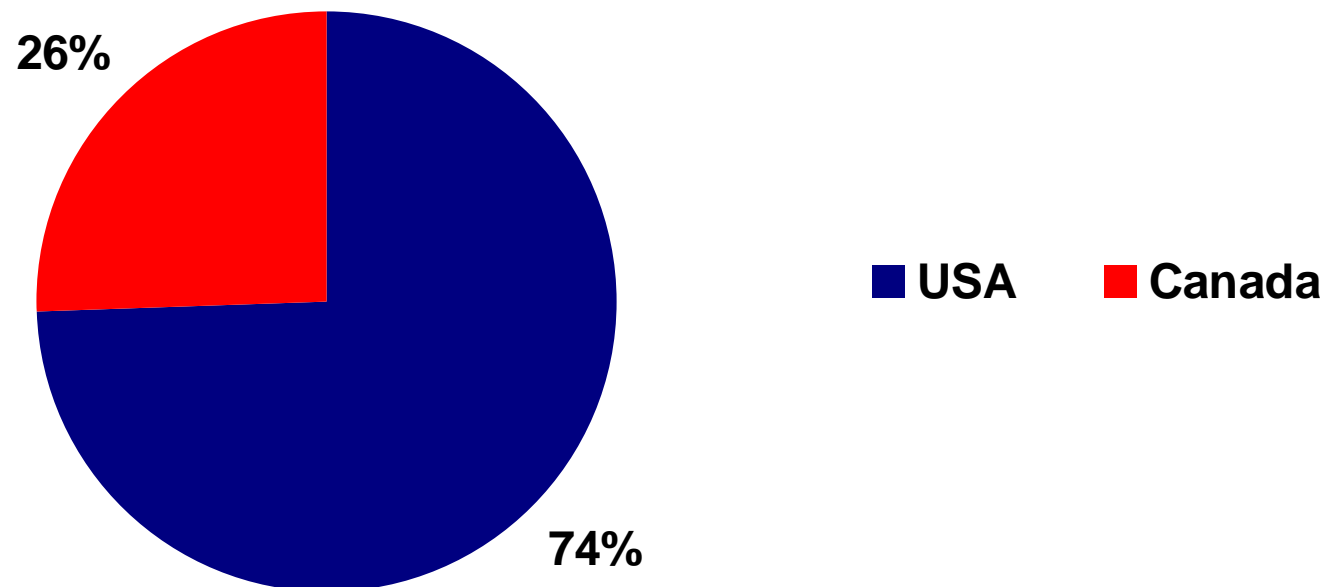
The main permanent crops 2008



North America: Land under organic management (ha) 2008

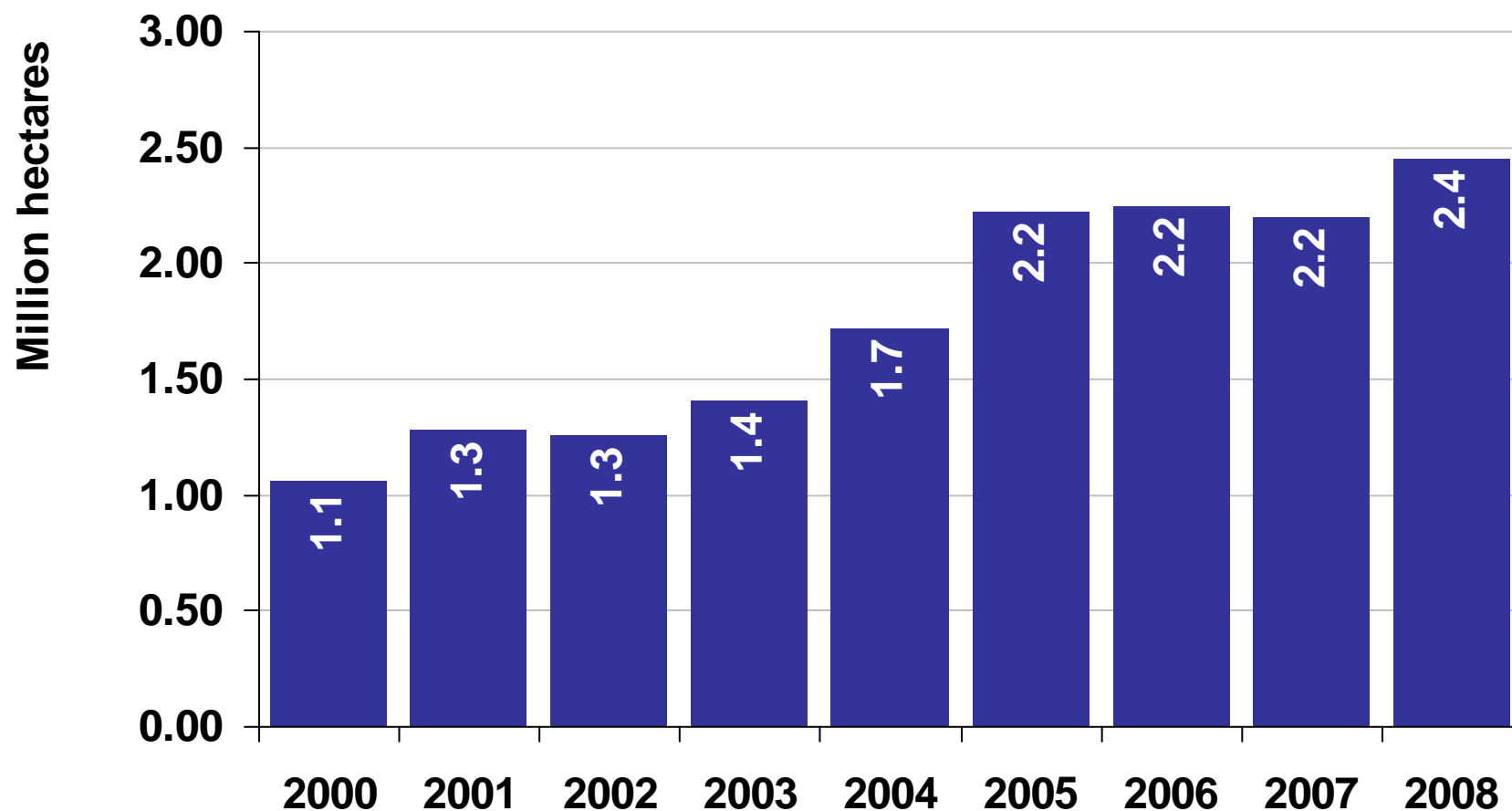


North America: Distribution of organically managed agricultural land by country 2008; total: 2.5 million hectares



Source: USDA and Canadian Organic Growers 2010

North America: Development of organically managed agricultural land 2000-2008



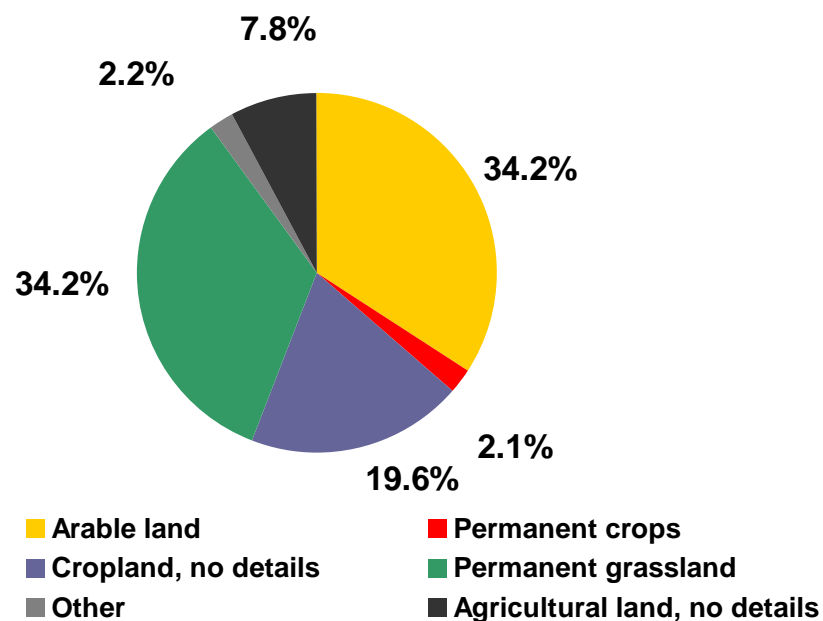
For the US, no data are available for 2006 and 2007, hence the 2005 data are used. For Canada, no data on the conversion areas were available for 2007, hence the drop in that year.

North America: Use of organic agricultural land 2008

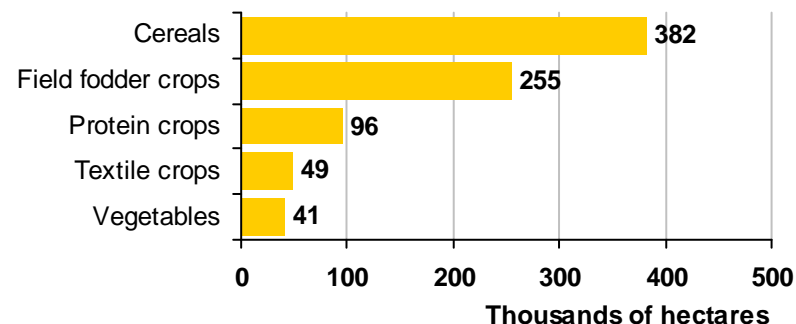
(total: 2.5 million hectares, most land use data from 2005)

(Revision date: March 5, 2010)

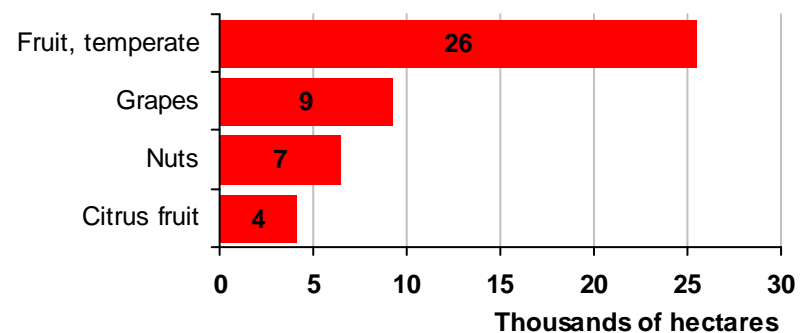
Distribution of main agricultural land use types 2008



The main arable crops 2005



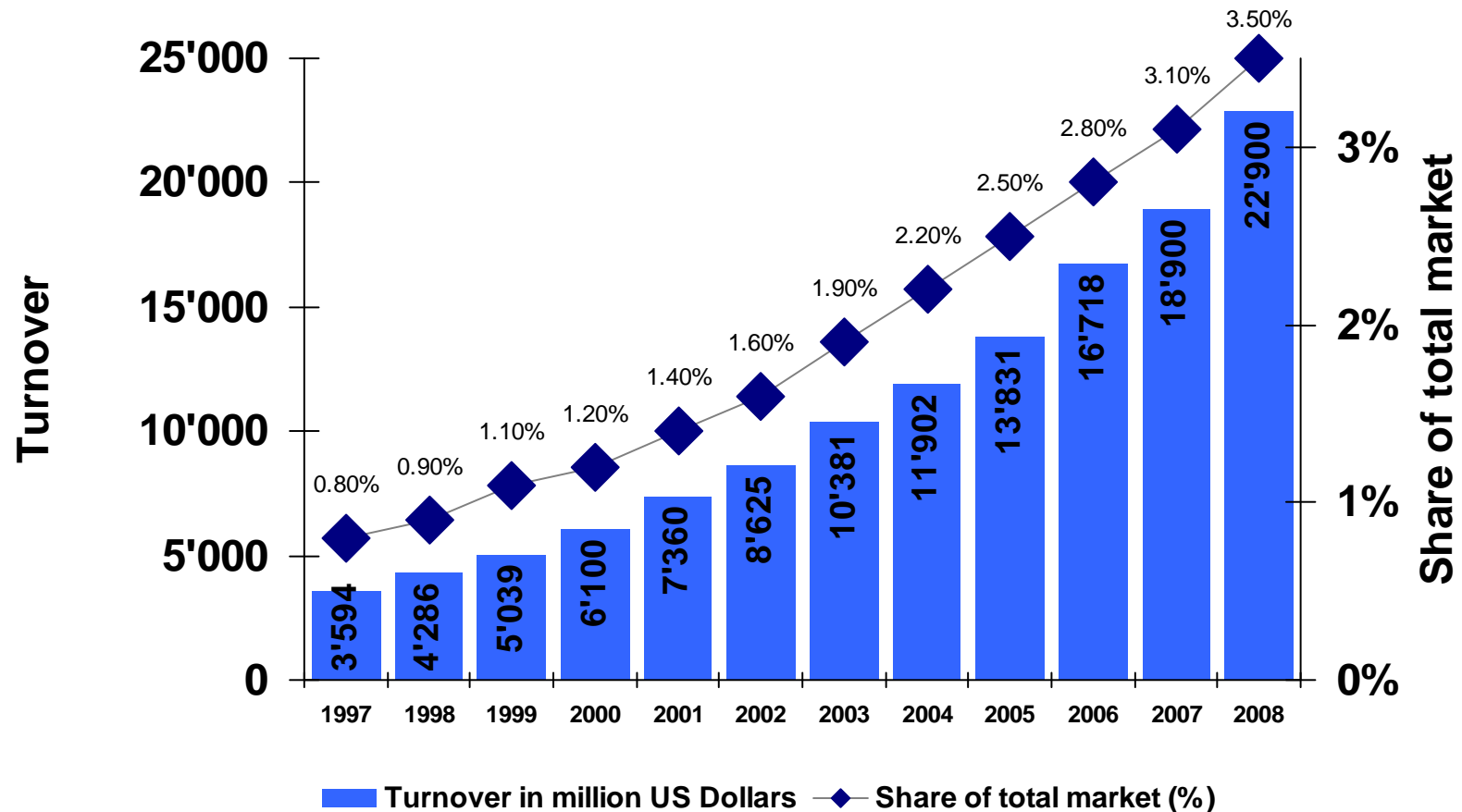
The main permanent crops 2005



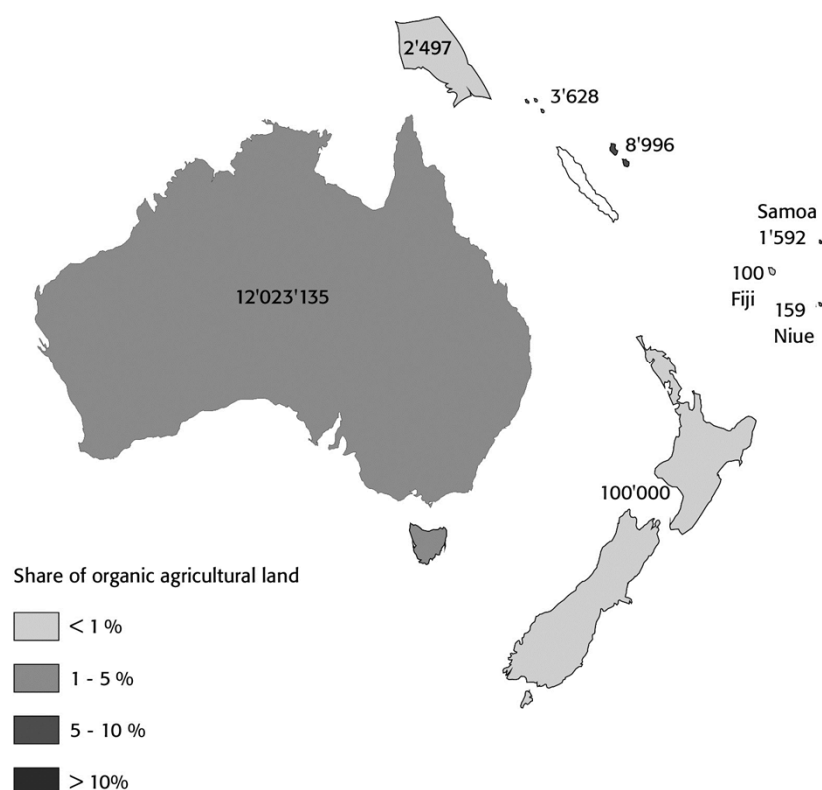
Further reading/Sources

- › Willer, Helga and Lukas Kilcher (eds.) (2010): The World fo

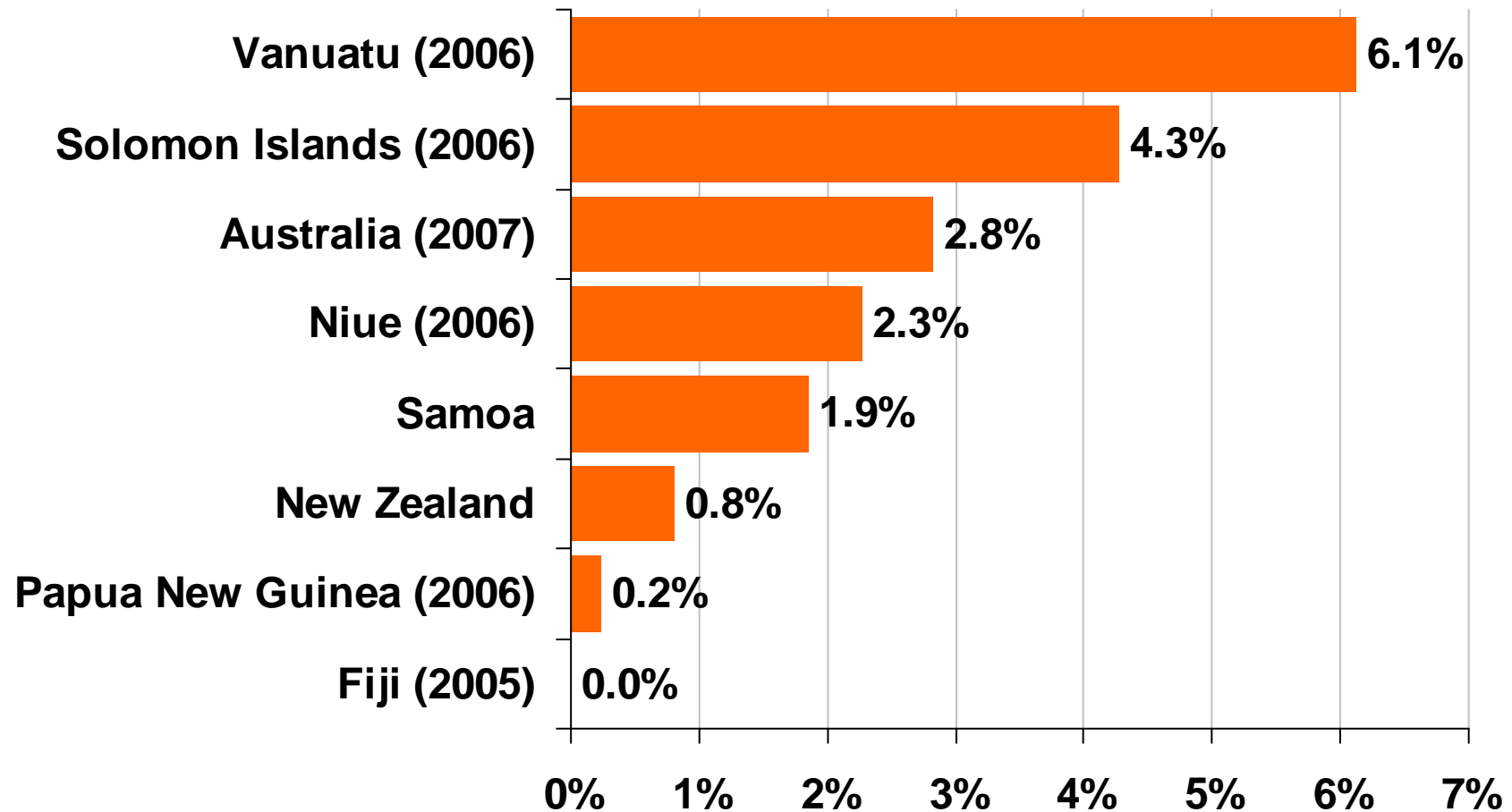
US: Organic food sales 1997-2008



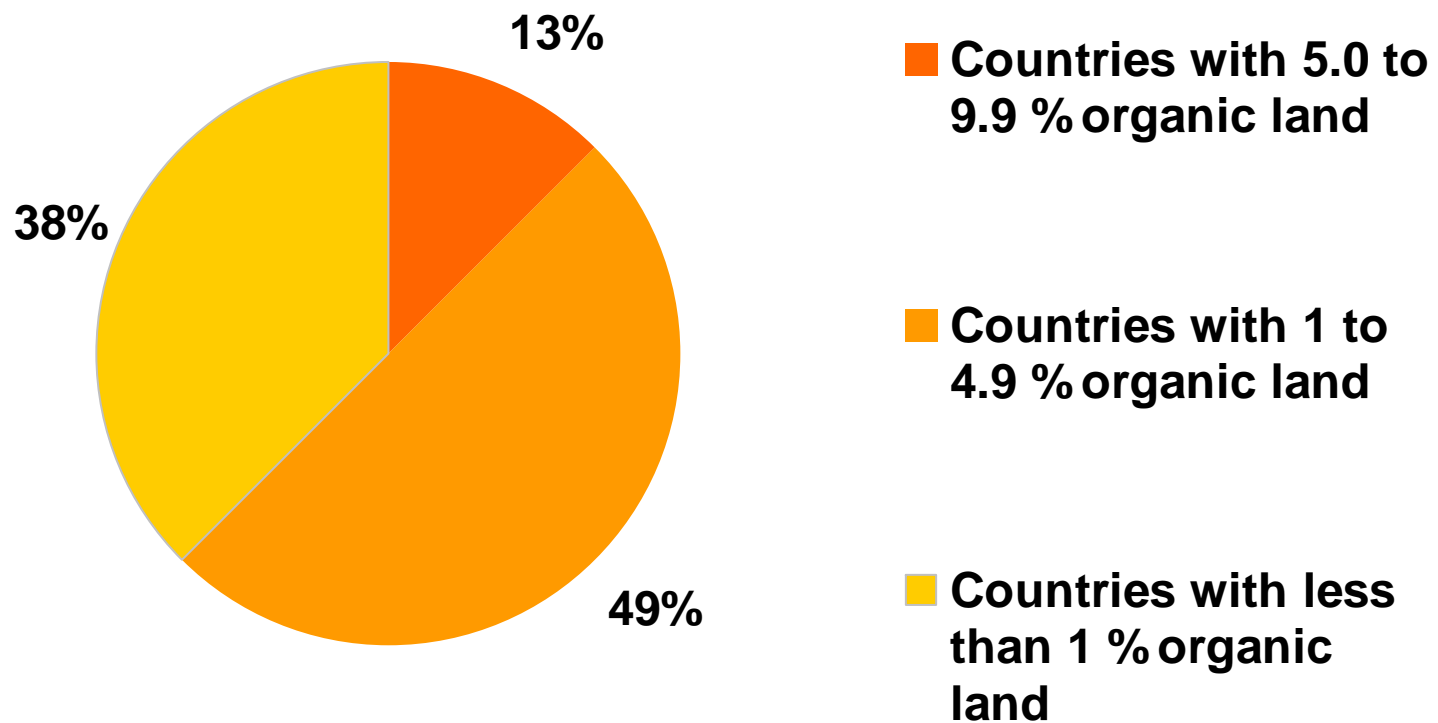
Oceania: Land under organic agricultural management (ha) 2008



Oceania: Shares of organic agricultural land 2008



Oceania: Shares of organic land 2008



Oceania: Use of organic agricultural land 2008 (total: 12.1 million hectares)

(Revision date: March 5, 2010)

