

FiBL Forschungsinstitut für biologischen Landbau
Institut für Biochemie der Landwirtschaft Biologie
Research Institute of Organic Agriculture

IFOAM
INTERNATIONAL FEDERATION OF
ORGANIC AGRICULTURE MOVEMENTS

Key results from the survey on organic agriculture worldwide 2011 Part 3: Organic agriculture in the regions 2009

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

Supported by: Swiss State Secretariat of Economic Affairs, International Trade Centre, NürnbergMesse

Data as published February 2011 in *The World of Organic Agriculture. Statistics and Emerging Trends 2011*
For updates check www.organic-world.net

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<http://www.organic-world.net/presentations-2011.html>

Version: 30.5.2011

The Global Survey on Organic Agriculture: Supporters

- International Trade Centre, Geneva
- The Swiss State Secretariat of Economic Affairs SECO, Berne
- Nürnberg Messe, the organizers of the BioFach Organic Trade Fair

FiBL www.fibl.org

The World of Organic Agriculture 2011

- The 12th edition of 'The World of Organic Agriculture' was published by FiBL and IFOAM in February 2011.*
- Contents:
 - Results of the survey on organic agriculture worldwide;
 - Organic agriculture in the regions and country reports;
 - Armenia, Australia, Canada, Chile, China, Costa Rica, Indonesia, Kazakhstan, Republic of Korea, Pacific Islands, Switzerland, Tunisia, Uganda, United States and Ukraine.
 - Chapters on the global market, standards & legislations, voluntary standards and organic beekeeping
 - Numerous tables and graphs.
 - The book can be ordered via IFOAM.org and shop.FiBL.org.
 - *Willer, H. and Kilcher, L. (2011) The World of Organic Agriculture. Statistics and Emerging Trends 2011. IFOAM, Bonn, and FiBL, Frick

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Website www.organic-world.net

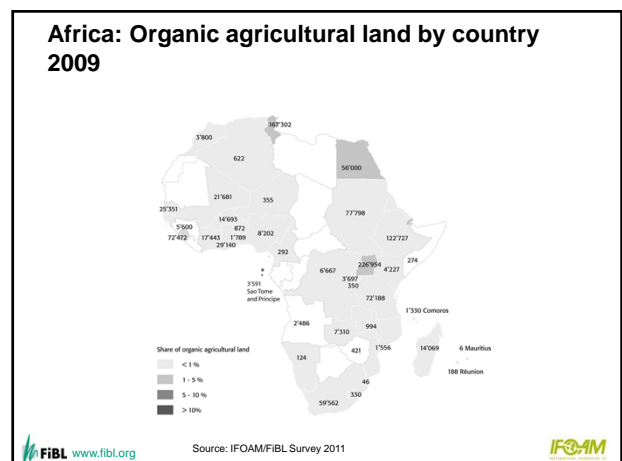
- Detailed statistics in excel format (in progress)
- Graphs & Maps
- Data revisions
- News and background information

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About this presentation

- This presentations summarizes the key results of the FiBL/IFOAM survey on organic agriculture worldwide 2011 (data 2009). In addition key results on crop and on regional data are presented.
- More information is available at the password area of www.organic-world.net
- The presentations has 4 main chapters:
 - Data background and key data on organic agriculture: Land, producers, market data 2009
 - Organic agriculture in developing countries 2009
 - Land use and key crops in organic agriculture 2009
 - Organic agriculture in the regions

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Organic agriculture in Africa 2009

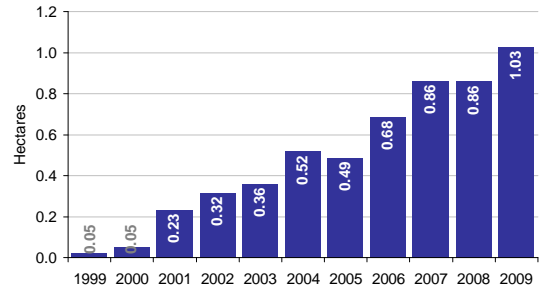
- > In Africa, there are slightly more than one million hectares of certified organic agricultural land (data 2009).
- > This constitutes about three percent of the world's organic agricultural land.
- > 500'000 producers were reported.
- > The countries with the most organic land are Uganda (226'954 hectares), Tunisia (167'302 hectares), and Ethiopia (122'727 hectares).
- > The highest shares of organic land are in Sao Tome and Principe (6.5 percent), Sierra Leone (1.8 percent), and Uganda (1.7 percent).
- > The majority of certified organic produce in Africa is destined for export markets; in Uganda the export value for organic products was 37 million US dollars in 2009/2010.
- > The European Union, as the major recipient of these exports, is Africa's largest market for agricultural produce. Tunisia was accepted under the EU's Third Country List in 2009.



Source: IFOAM/FIBL Survey 2011



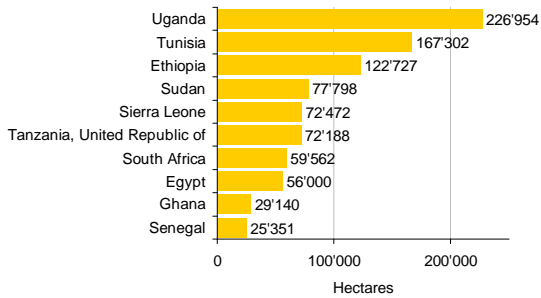
Africa: Development of organic agricultural land 1999-2009



Source: IFOAM, FIBL and SOEL, surveys 2000-2011



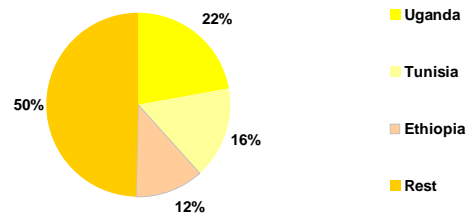
Africa: The ten countries with the most organic agricultural land 2009



IFOAM/FIBL Survey 2011, based on data from governments, the private organic sector and certifiers



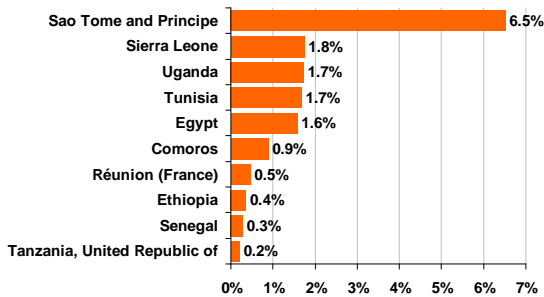
Africa: Distribution of organically managed agricultural land by country 2009 (total: 1.03 mio ha)



IFOAM/FIBL Survey 2011, based on data from governments, the private organic sector and certifiers



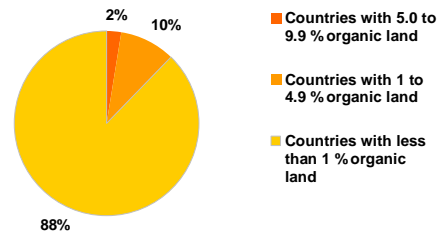
Africa: The ten countries with the highest shares of organic agricultural land 2009



IFOAM/FIBL Survey 2011, based on data from governments, the private organic sector and certifiers



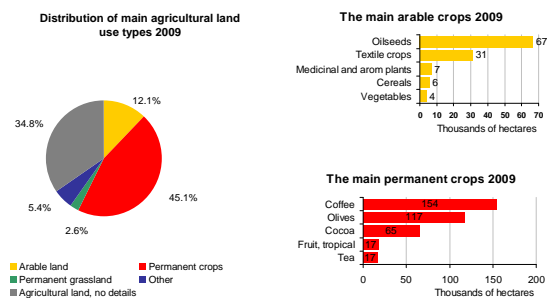
Africa: Distribution of shares of organic land 2009



Source: FIBL/IFOAM Survey 2011



Africa: Use of organic agricultural land 2009 (total: 1 million hectares)



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IFOAM/FIBL Survey 2011

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Articles about Africa in the 2011 Edition of "The World of Organic Agriculture"

- › Organic Farming in Africa
Hervé Bouagnimbeck
- › Tunisia: Country Report
Lukas Kilcher and Samia Maamer Belkhiria
- › Uganda: Country Report
Charity Namuwoza and Hedwig Tushemerirwe

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Asia: Organic agricultural land by country 2009



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Source: FIBL/IFOAM Survey 2011, based on national sources

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Organic Agriculture in Asia – Key Figures 2009

- › The total organic agricultural area in Asia is nearly 3.6 million hectares.
- › This constitutes ten percent of the world's organic agricultural land.
- › There were 731'315 producers reported.
- › The leading countries by area are China (1.9 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).

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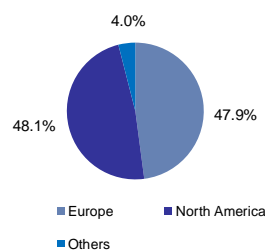
Organic Agriculture in Asia – Key Figures 2009

- › The region hosts a wide range of organic sector development scenarios, from early development to highly regulated. Far from the marginal position it held previously, organic is now an accepted concept and growing market trend in the region.
- › Whilst export remains the dominant feature of sector development in the majority of developing countries in the region, local markets have emerged and are gaining ground.
- › Primarily a market driven sector, government policy is an emerging and significant sector development factor today in many countries. Although domestic market size is still relatively small, the high value and profile associated with organic has led to civil society (consumer) calls and governments' interest to regulate the sector. Seven markets have implemented organic labeling regulations (i.e., China, India, Japan, South Korea, Philippines, Taiwan, and Malaysia). Others, Sri Lanka and Nepal have established government competent authorities.
- › A major event— The 17th IFOAM Organic World Congress—will be held in Korea in autumn 2011.

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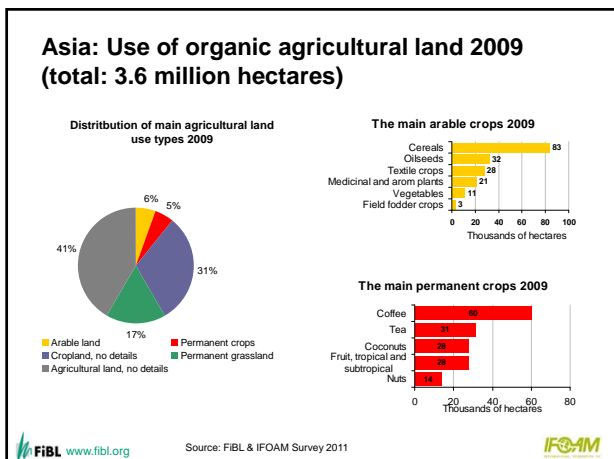
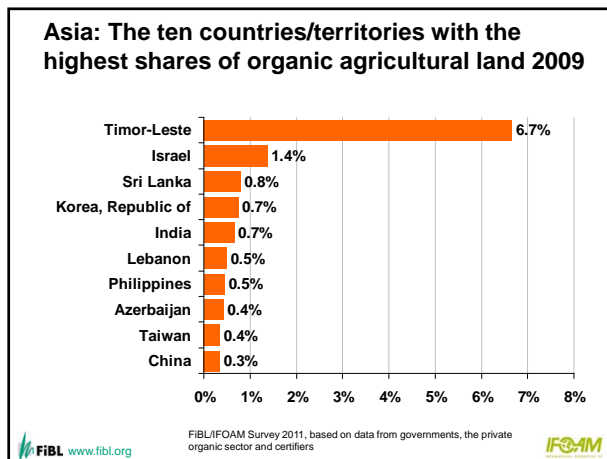
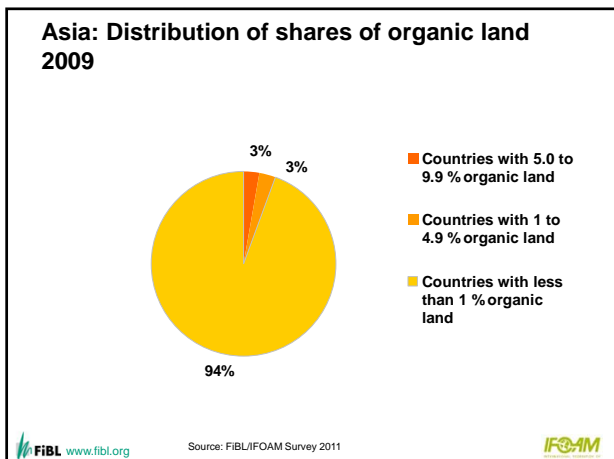
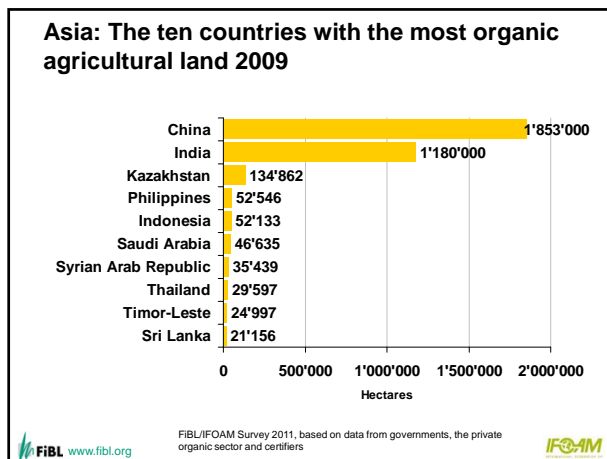
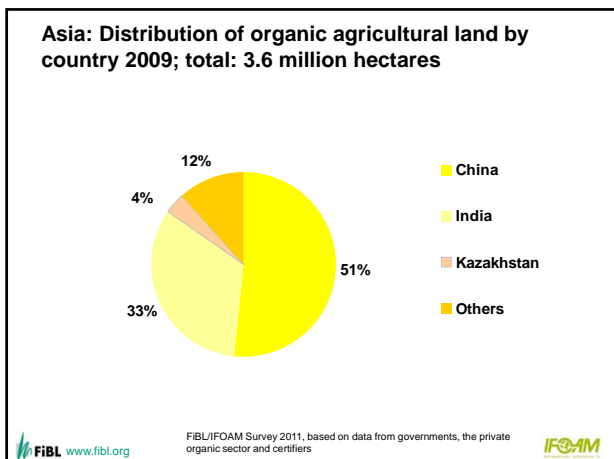
Asia: Development of organic agricultural land 2000-2009



Source: FIBL/IFOAM Survey 2011
The increase of organic agricultural land in 2004 is due to a major expansion in China, partly due to government support. Much of these areas were grazing areas which, however, ceased to be certified in 2005, hence the drop of the organic agricultural area in Asia in that year.

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- ### Articles about Asia in the 2011 Edition of "The World of Organic Agriculture"
- > Organic Asia 2010
Ong Kung Wai
 - > Organic Agriculture in Armenia
Nune Darbinyan
 - > Organic Agriculture Development in China
Yuhui Qiao
 - > Indonesia: Country Report
 - > Lidya Ariesusanty
 - > Kazakhstan: Country Report
Evgeniy Klimov
 - > South Korea: Country Report
Dong-Geun Choi



Organic agriculture in Europe: Key data/indicators 2009

- > 9.2 million hectares of agricultural land are organic (including in conversion areas).
- > This constitutes 1.9 percent of the agricultural land in Europe.
- > The organic agricultural land increased by one million hectares or twelve percent in 2009 .
- > 260'000 producers were reported.

Source: FiBL Survey 2011, revision of May 15, 2011

Organic agriculture in the European Union: Key data/indicators 2009

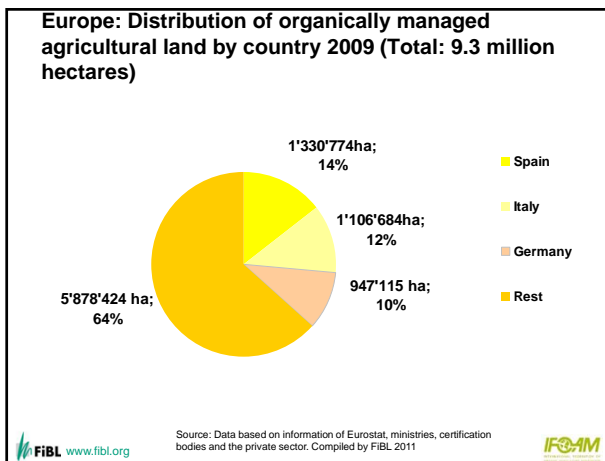
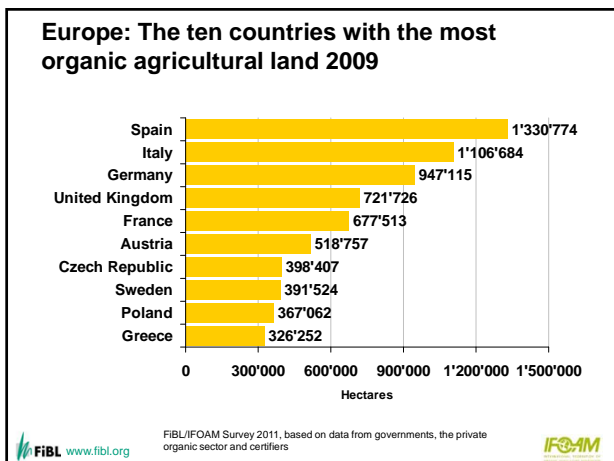
- > 8.4 million hectares of agricultural land are organic (including in conversion areas).
- > This constitutes 4.7 percent of the agricultural land in the European Union.
- > The organic agricultural land increased by 0.7 million hectares or nine percent in 2009 .
- > More than 200'000 producers were reported.

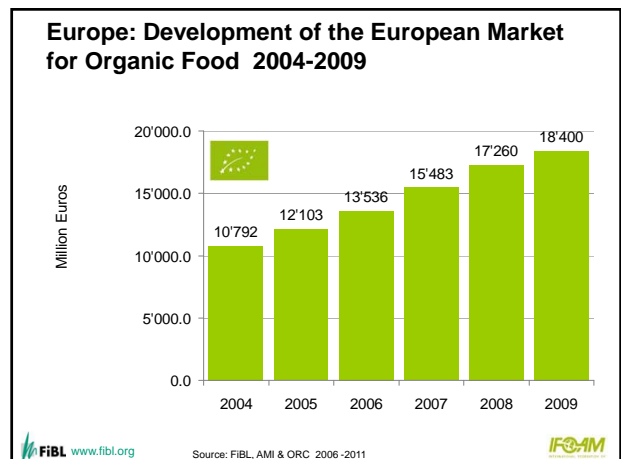
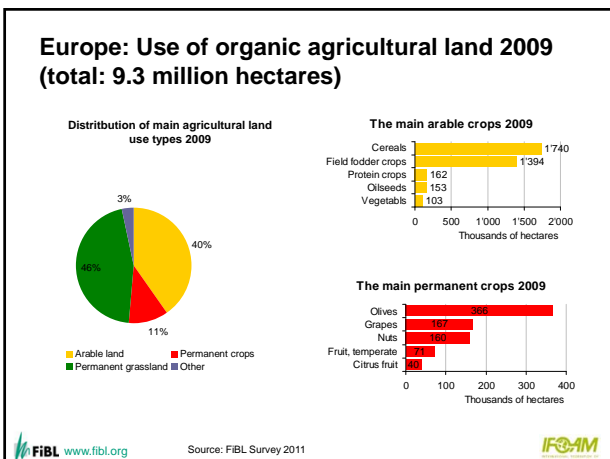
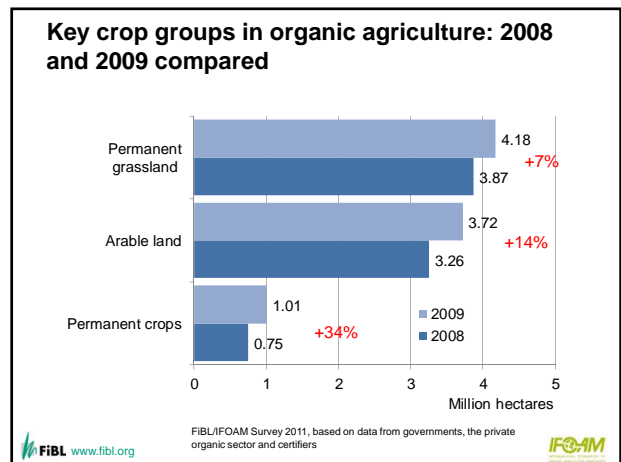
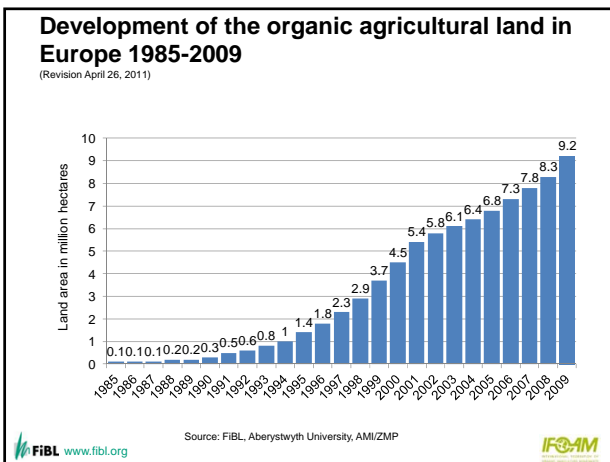
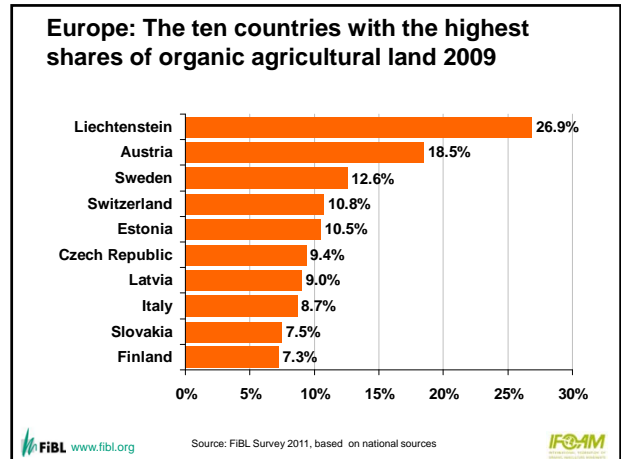
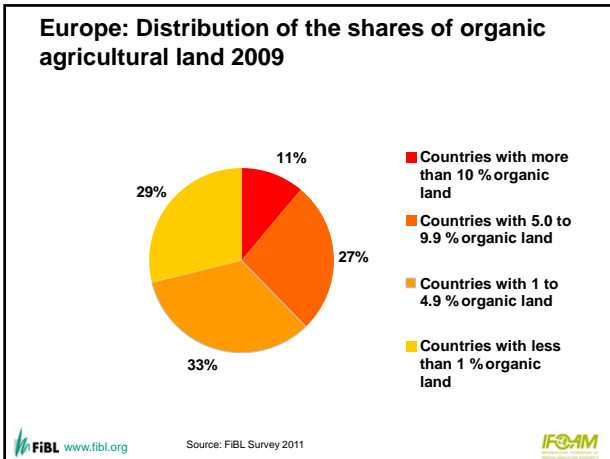
Source: FiBL Survey 2011, revision of May 15, 2011

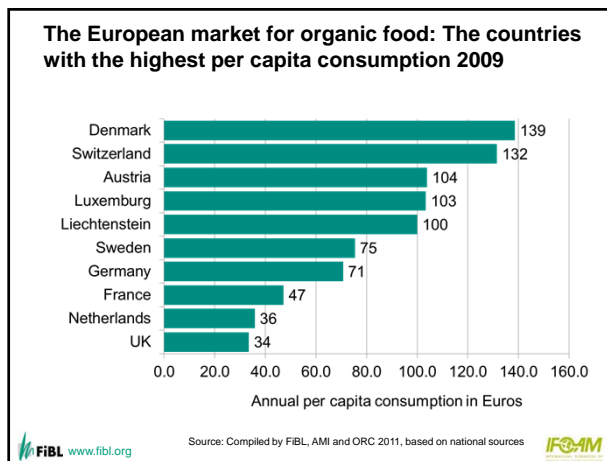
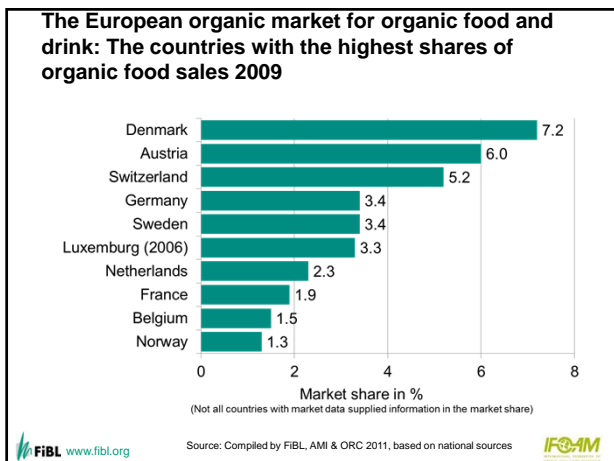
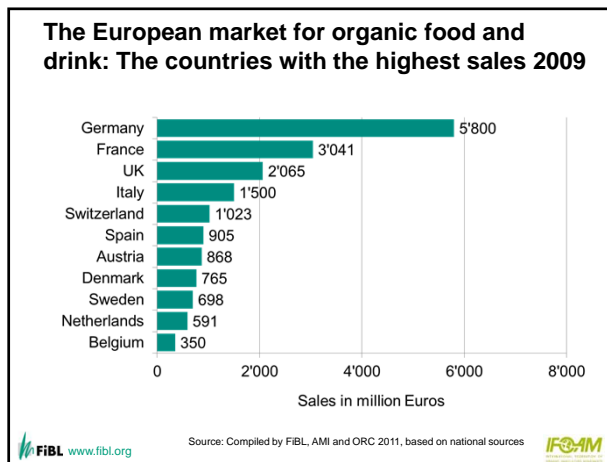
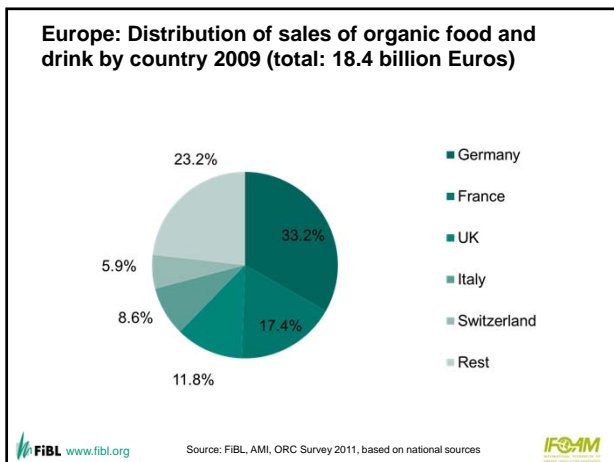
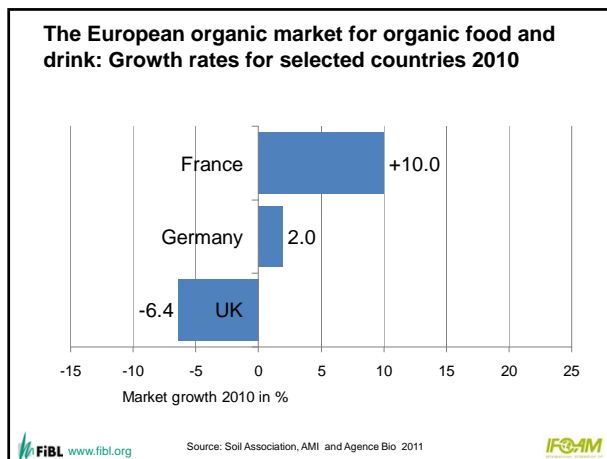
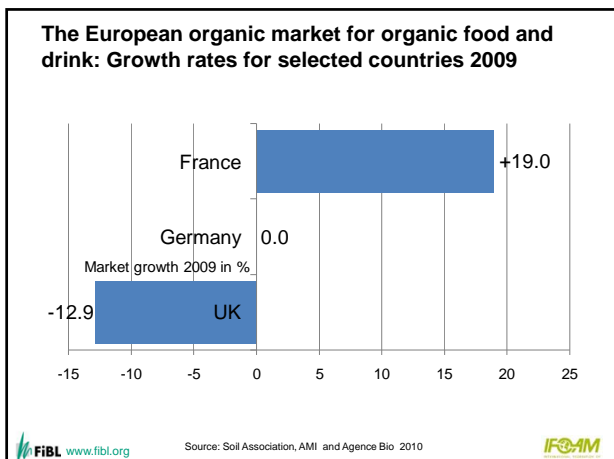
Organic agriculture in Europe: Key data/indicators 2009

- > The market was 18.4 billion euros, an increase of roughly five percent compared with 2009. The market grew at smaller rates than in previous years even though some countries like France and Sweden showed strong growth.
- > The largest market for organic products in 2009 was Germany with a turnover of 5'800 million euros, followed by France (3'041 million euros) and the UK (2'065 million euros).
- > As a portion of the total market share, the highest levels have been reached in Denmark, Austria and Switzerland, with five percent or more for organic products. The highest per capita spending is also in these countries.
- > Support for organic farming in the European Union and neighboring countries includes grants under rural development programs, legal protection, and the European as well as national action plans. An updated overview of European action plans shows that currently 26 action plans (including regional action plans) are in place.

Source: FiBL Survey 2011, revision of May 15, 2011







Summary: Organic market in Europe 2009

- › **Land area**
- › The organic agricultural land increased by 1 million hectares or 12 percent – to 9.3 million hectares (EU: 8.4 million hectares)
- › The highest growth was in Turkey and Spain (both +0.2 million hectares) and Italy (+0.1 million hectares)
- › The countries with the highest shares of organic agricultural land are Liechtenstein, Austria and Sweden.
- › **Organic market**
- › The organic market increased by roughly five percent to 18.4 billion Euros;
- › Highest growth rates were reported for France (+19 percent) and Sweden (+16 percent)
- › The market value stagnated however in Germany and it decreased in the UK (-13 percent)
- › The highest per-capita consumption is in Denmark and in Switzerland with more than 130 Euros annually
- › The highest market shares are in Denmark, Austria and Switzerland.

Articles about Europe in the 2011 Edition of "The World of Organic Agriculture"

- › Organic Agriculture in Europe: Overview
Helga Willer
- › The Organic Market in Europe
Diana Schaack, Helga Willer, and Susanne Padel
- › Organic Action Plans in Europe in 2010
Victor González, Otto Schmid and Helga Willer
- › Switzerland: Country Report
Lukas Kilcher
- › Ukraine Country Report
Natalie Prokopchuk and Tobias Eisenring

Latin America/Caribbean: Organic agricultural land by country 2009



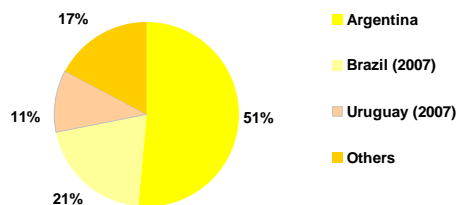
Latin America: Key figures 2009

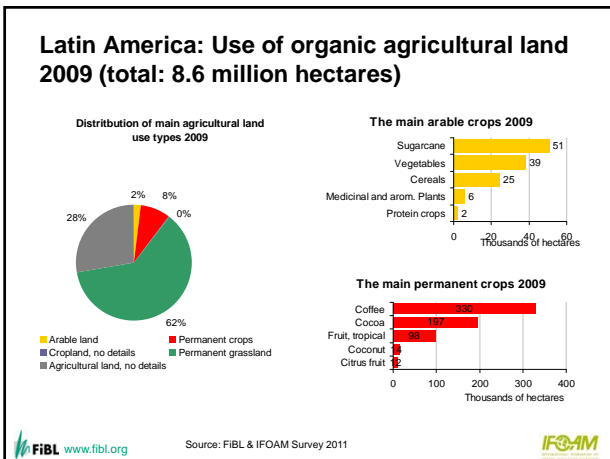
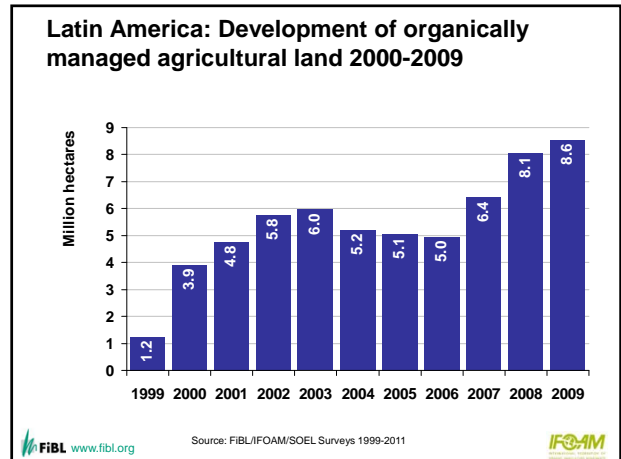
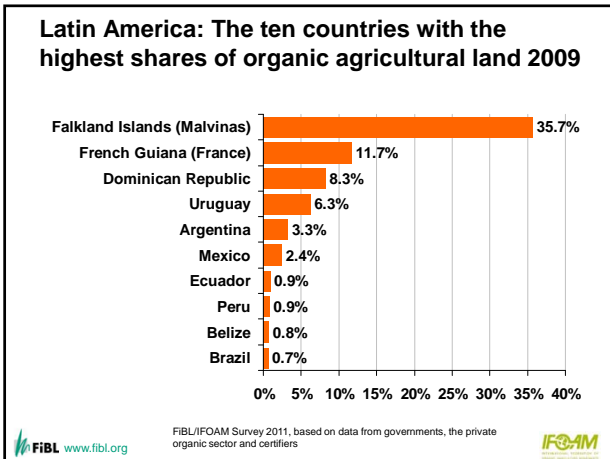
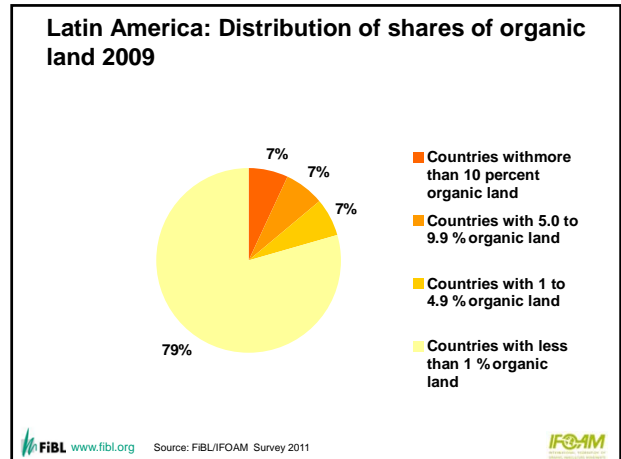
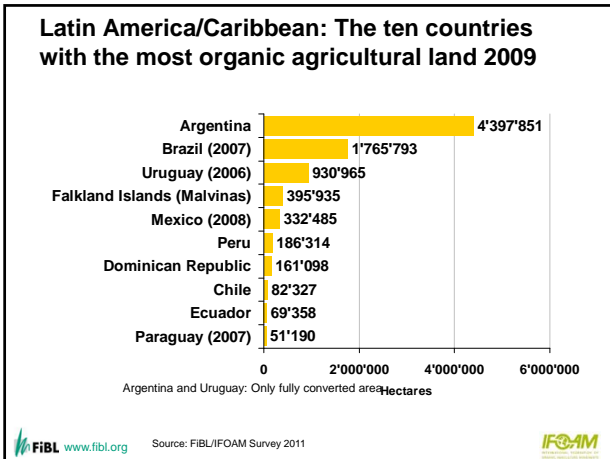
- › In Latin America, more than 280'000 producers managed 8.6 million hectares of agricultural land organically in 2009.
- › This constitutes 23 percent of the world's organic land and 1.4 percent of the regions agricultural land.
- › The leading countries are Argentina (4.4 million hectares), Brazil (1.8 million hectares), and Uruguay (930'965 hectares).
- › The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.7 percent), the Dominican Republic (8.3 percent), and Uruguay (6.3 percent).

Latin America: Key figures 2009

- › 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 these regions, as well as off-season products. Thus, the development of robust local markets is still a major challenge, without which the sustainability of organic production cannot be achieved. 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.
- › Eighteen countries have legislation on organic farming, and five additional countries are currently developing organic regulations. Costa Rica and Argentina have both attained Third Country status according to the EU regulation on organic farming.
- › The types of support in Latin American countries range from organic agriculture promotion programs to market access support by export agencies.

Latin America/Caribbean: Distribution of organically managed agricultural land by country 2009 (total: 8.6 million hectares)





- ### Articles about Latin America and the Caribbean in the 2011 Edition of "The World of Organic Agriculture"
- > Organic Farming in Latin America and the Caribbean
Salvador V. Garibay, Roberto Ugas, and Patricia Flores Escudero
 - > Chile: Country Report
Pilar Eguillor Recabarren
 - > Costa Rica: Country Report
Roberto Azofeifa
 - > All in Willer/Kilcher (Eds.) 2011: The World of Organic Agriculture. Statistics and Emerging Trends 2011. IFOAM and FiBL, Bonn and Frick

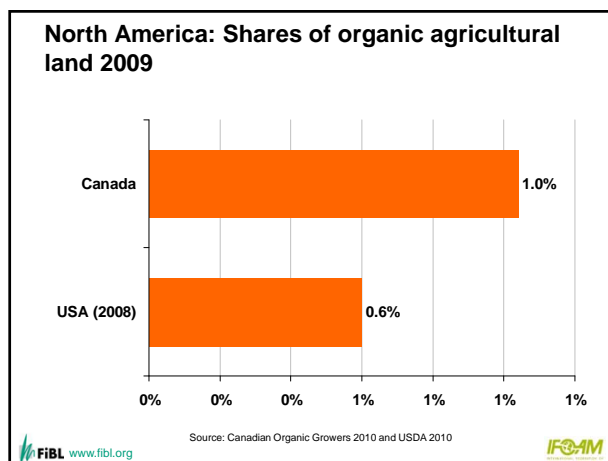
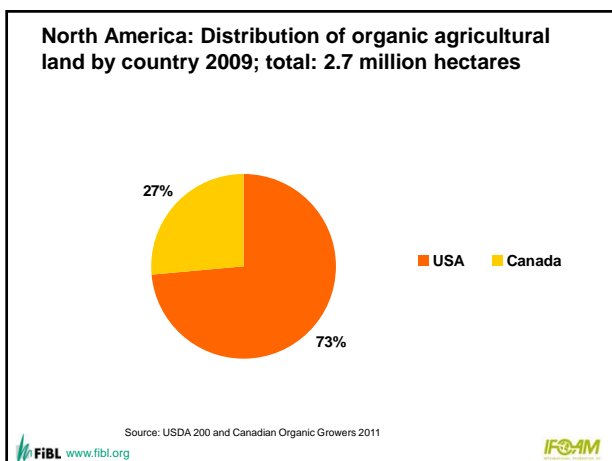
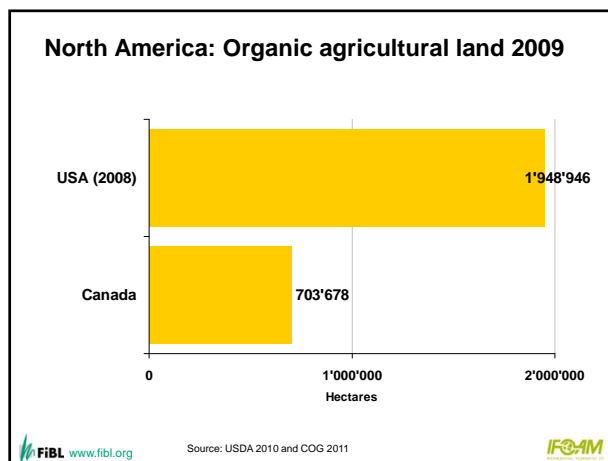


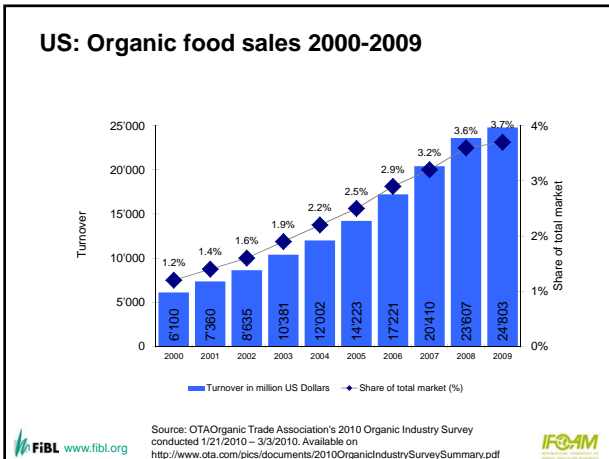
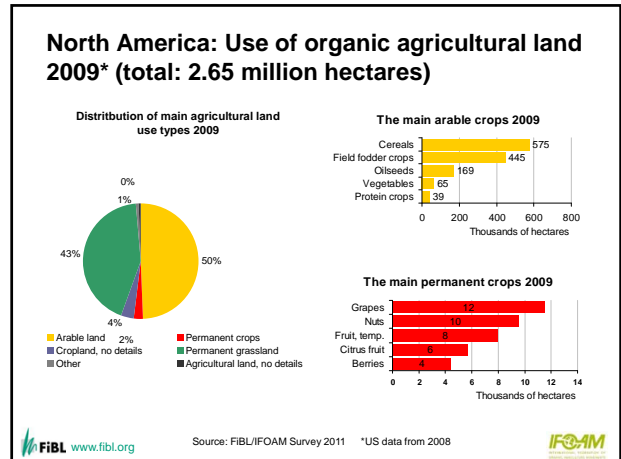
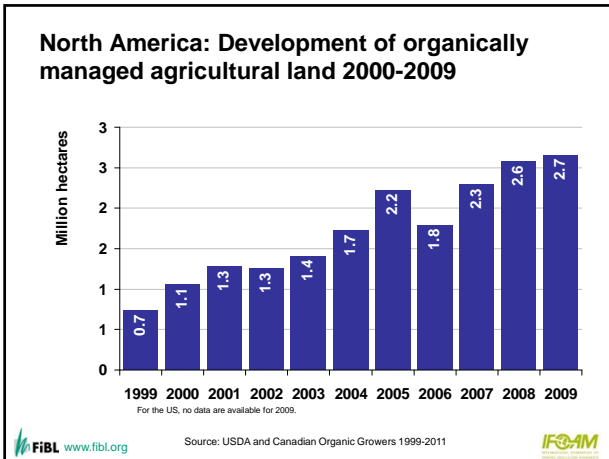
Organic Agriculture in North America: Key figures 2009

- > In North America, almost 2.7 million hectares are managed organically, of these nearly two million in the United States and 0.7 million in Canada.
- > This represents approximately 0.7 percent of the total agricultural area in the region and 7 percent of the world's organic agricultural land.
- > US sales of organic products continued to grow during 2009 despite the distressed state of the economy. In fact, organic product sales in 2009 grew by 5.3 percent overall, to reach 26.6 billion US dollars.
- > Of that figure, 24.8 billion US dollars represented organic food or 3.7 percent of the food market. The remaining 1.8 billion were sales of organic non-foods.
- > Projections for 2010 and beyond indicate higher growth rates for organic sales in North America.

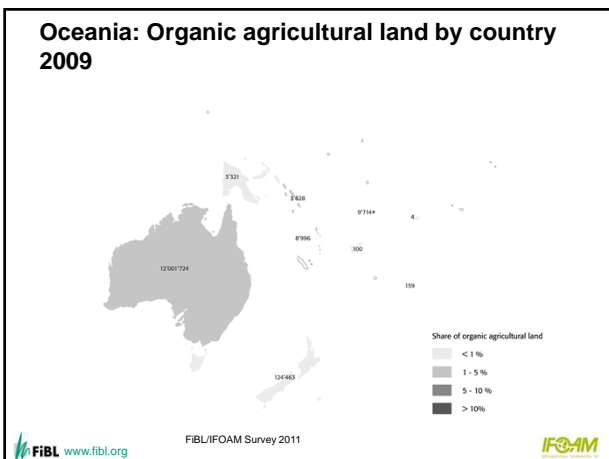
Organic Agriculture in North America: Key figures 2009

- > In Canada, Agriculture and Agri-Food Canada in 2010 released a new report on the Canadian organic sector's trade data and retail sales. Analyzing the 2008 sales of organic foods, the report concludes that the total Canadian organic market is worth 2 billion Canadian dollars annually.
- > Regarding legislation, representatives from the Canada Organic Office and the US National Organic Program have completed a full peer review, in order to monitor and evaluate how the US-Canada organic equivalence arrangement is being applied.





- ### Articles about North America in the 2011 Edition of "The World of Organic Agriculture"
- > North American Overview
Barbara Fitch Haumann
 - > United States: Country Report
Barbara Fitch Haumann
 - > Canada: Country Report
Matthew Holmes and Anne Macey
 - > All in Willer/Kilcher (Eds.) 2011: The World of Organic Agriculture. Statistics and Emerging Trends 2011. IFOAM and FiBL, Bonn and Frick

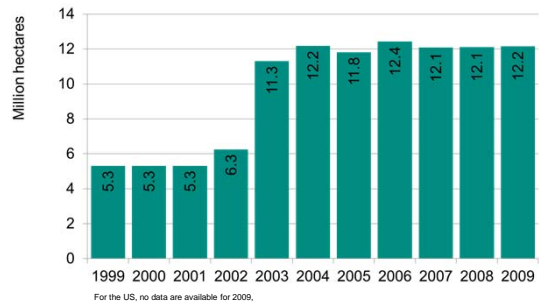


- ### Organic agriculture in Oceania: Key figures 2009
- > This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu.
 - > Altogether, there are 8'466 producers, managing 12.2 million hectares.
 - > This constitutes 2.8 percent of the agricultural 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 Vanuatu (8'996 hectares).
 - > The highest shares of all agricultural land are in Samoa (7.9 percent), followed Vanuatu (6.1 percent), the Solomon Islands (4.3 percent), and Australia (2.9 percent).

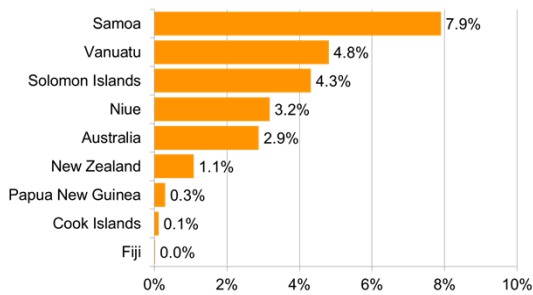
Organic agriculture in Oceania: Key figures 2009

- › 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 it was at 947 Australian dollars in 2009 and in New Zealand at 350 million New Zealand dollars.
- › 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.
- › The year 2010 marked a milestone for the Pacific Region: The International Organic Accreditation Service (www.ioas.org) assessed the Pacific Organic Standard (POS) and found it to be equivalent to the standards requirements of the European Union's organic regulations.

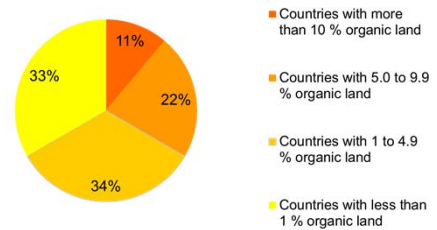
Oceania: Development of organic agricultural land 1999-2009



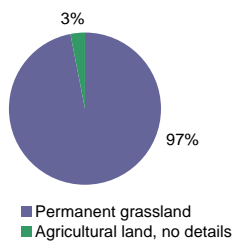
Oceania: Shares of organic agricultural land 2009



Oceania: Shares of organic land 2009



Oceania: Use of organic agricultural land 2009 (total: 12.15 million hectares)



Articles about Oceania in the 2011 Edition of "The World of Organic Agriculture"

- › Organic Farming in Australia
Els Wynen, Alexandra Mitchell, and Paul Kristiansen
- › The Pacific Islands
Karen Mapusua
- › All in Willer/Kilcher (Eds.) 2011: The World of Organic Agriculture. Statistics and Emerging Trends 2011. IFOAM and FiBL, Bonn and Frick

Abbreviations

- › AMI: Agrarmarkt Informations-Gesellschaft mbH (AMI, information service for organic markets), www.ami-informiert.de
- › COG: Canadian Organic Growers – www.cog.ca
- › FiBL: Research Institute of Organic Agriculture, Switzerland
- › IFOAM: International Federation of Organic Agriculture Movements, Germany, www.ifoam.org
- › ORC: Organic Research Centre Elm Farm, UK, www.efrc.com
- › RUTA: Unidad Regional de Asistencia Técnica (RUTA; Regional Unit for Technical Assistance), Costa Rica, www.ruta.org
- › USDA: United States Department of Agriculture (USDA), www.usda.gov