



Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2018

Part I: Global data and survey background

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Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2018: Part I: Global data and survey background

- Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, based on national data sources and data from certifiers.
- Data as published February 2018 in FiBL & IFOAM – Organics International (2018) The World of Organic Agriculture. Statistics and Emerging Trends 2018. Frick and Bonn
- For updates check www.organic-world.net
- This presentation is available online at: <http://www.organic-world.net/yearbook/yearbook2018/slide-presentations.html>
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- Nürnberg Messe, the organizers of the BIOFACH World Organic Trade Fair
- IFOAM – Organics International
- 200 experts from all parts of the world contributed to the FiBL survey 2018.



* See also disclaimer on last page of this slide show



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The World of Organic Agriculture 2018

The 19th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2018.*

- Contents:
 - Results of the survey on organic agriculture worldwide;
 - Organic agriculture in the regions and country reports; Australia, Canada, the Pacific Islands, Ukraine, and The United States of America.
 - Chapters on the global market, standards & legislations, PGS, policy support, European market.
 - Numerous tables and graphs.
 - Commodity case studies:
 - Chapter on organic cotton
 - Overview of the state of other Voluntary Sustainability Standards
 - The book can be ordered via IFOAM.bio and shop.FiBL.org.
 - *Willer, H, Lernoud, J, (2018) The World of Organic Agriculture. Statistics and Emerging Trends 2018. FiBL, Frick, and, IFOAM – Organics International, Bonn

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Website www.organic-world.net

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

Organic World

Global organic farming statistics and news



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Yearbook "The World of Organic Agriculture"

The yearbook "The World of Organic Agriculture - Statistics and Emerging Trends", published by the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM), documents recent developments in global organic agriculture. The book has been published annually since 2000.

[The 2017 Edition will be launched at Biofach 2017.](#)

A central part of the book are the organic agricultural statistics, which are collected annually in the frame of the [annual survey on organic agriculture worldwide](#).

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

The World of Organic Agriculture 2017



[The World of Organic Agriculture 2017](#)

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The World of Organic Agriculture 2016



About this presentation

There are 3 presentations summarizing the key results of the FiBL survey on organic agriculture worldwide 2018 (data 2016). 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/yearbook2018/slide-presentations.html> :

- Part 1: Global data 2016 and survey background
- Part 2: Land use and key crops in organic agriculture 2016
- Part 3: Organic agriculture in the regions 2016

The 19th Survey on organic agriculture world-wide

The 19th 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 2017 and February 2018.

Data were received from 178 countries.

Updated data on area and producers were available for 150 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 2018” and at www.organic-world.net.

Countries covered by the survey on organic agriculture 2016

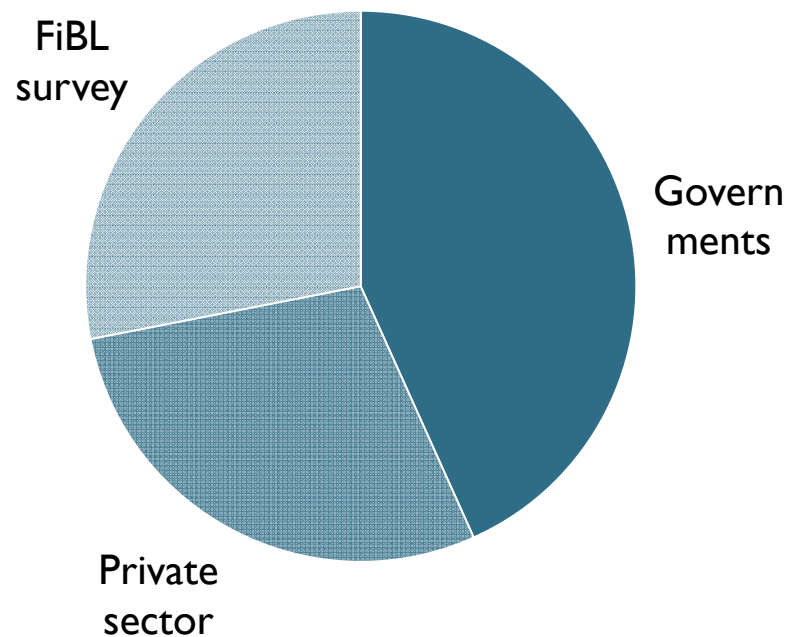
Table 1: Countries and territories covered by the global survey on organic agriculture 2016

Region	Countries* with data on organic agriculture	Countries per region ¹	Share of countries that provided data (%)
Africa	40	56	71%
Asia	41	49	84%
Europe	48	49	98%
Latin America and Caribbean	33	46	72%
North America	3	5	60%
Oceania	13	25	52%
World	178	230	77%

Source: FiBL survey 2018

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

Organic data collection systems world-wide for data on area, operators and production (total 178 countries)



- Government collection systems
 - Data from the certifiers
 - Census/farm structure survey
 - Direct payments
- Private collection systems
 - Data from the certifiers
 - Company data
- No collection system
 - FiBL collect the data from the international certifiers

International certifiers that provided data for several countries



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Soil Association

Networks, transnational data collection efforts



General notes on the data

Data sources: For data sources see annex of The World of Organic Agriculture 2018 or www.organic-world.net/statistics-data-sources.html

Countries: For countries and territories, the FAO country list is used. Where the designation "country" appears in this report, it covers countries or territories. As to the countries' grouping by region, the Standard Country and Area Classifications as defined by the United Nations Statistics Division, is used in most cases.

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 organic share of the total agricultural land or that of individual crops, based on FAOSTAT and in some cases the Eurostat data, might differ from the organic shares obtained from ministries or local experts.

Producers: Some countries report the number of smallholders while others report only the number of companies, projects, or grower groups, which may each comprise a number of producers. This applies in particular to many African countries. The number of producers is, therefore, probably higher than the number communicated in this report.

Data revisions: Should data revisions and correction become necessary these are communicated at the [data revision pages](http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2) of Organic-World.net: <http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2>.

The World of Organic Agriculture 2016

Organic Farmland 2016

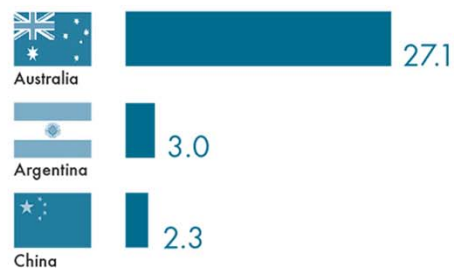


57.8 m ha Organic farmland in million hectares

178 Countries with organic farming

+15% From 2015

Top 3 countries
(land in million of hectares)



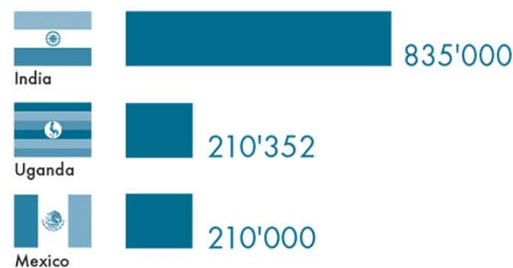
Organic Producers 2016

The number of organic producers is increasing

2.7 million Organic farmers

+12.8% From 2015

Number of producers:
Top 3 countries

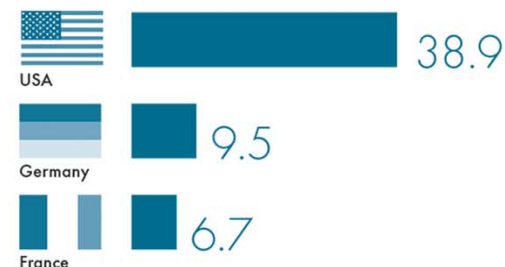


Organic Market 2016

The global market is growing and consumer demand is increasing

More than 80 bn € Global organic food market in billion euros

Top 3 countries
(market in billion euros)



21.8% Organic market growth

9.7% Market share

274 € Highest per capita spending is in Switzerland

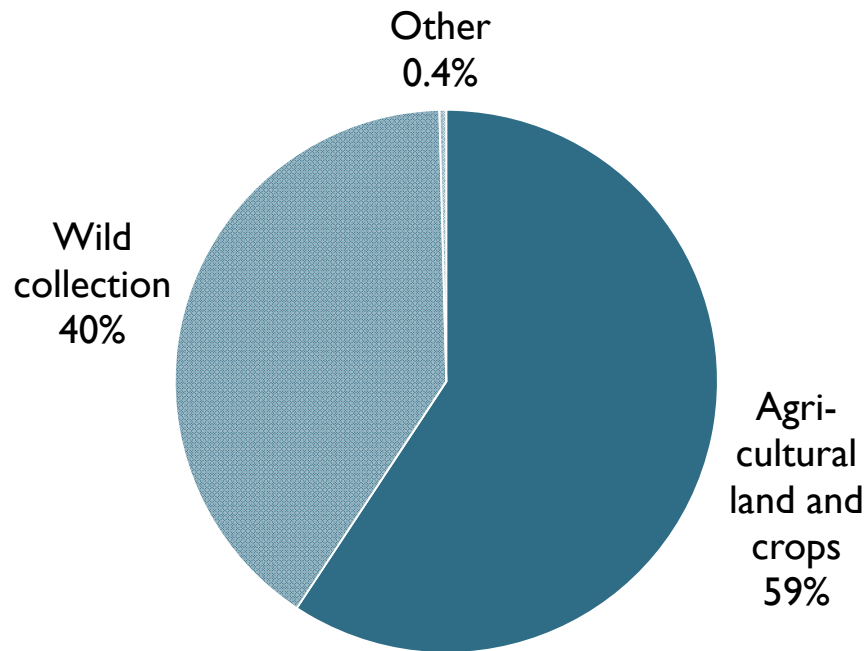
Key data/indicators on organic agriculture world-wide 2016

- 178 countries have data on organic agriculture.
- 57.8 million hectares of agricultural land are organic (including conversion areas).
- 15 countries have ten percent organic agricultural land or more, and 17 countries have between 5 and 10 percent organic agricultural land.
- There are more than 39.7 million hectares of further non agricultural areas.
- 2.7 million producers were reported.

World: Distribution of organic areas 2016

Distribution of all organic areas in 2016

Source: FiBL Survey 2018



- Agricultural land (57.8 million hectares in 2016)
 - Cropland
 - **Arable land** (cereals, vegetables etc.)
 - **Permanent crops** (fruit, grapes, olives ...)
 - **Cropland, no details** (=arable land and permanent crops with no further details)
 - Permanent grassland
 - Other agricultural land
- Non-agricultural areas (39.7 million hectares in 2016)
 - Wild collection/Bee keeping (39.3 million hectares)
 - Forest
 - Aquaculture
 - Grazing areas on non-agricultural land

World: Organic agricultural land by region 2016

Currently 57.8 million hectares are under organic agricultural management (end of 2016 for most data).

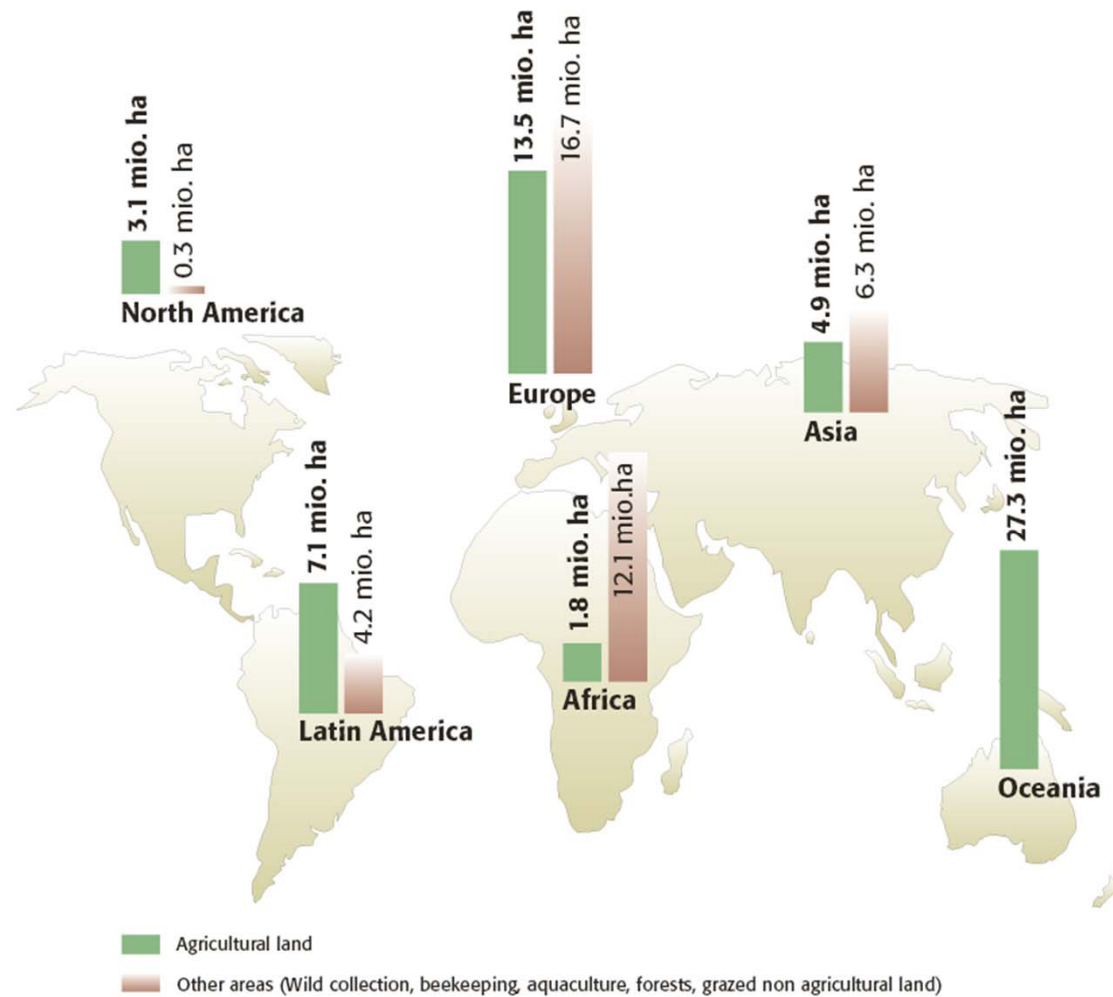
The distribution of the organic agricultural land is as follows:

- Oceania (27.3 million hectares);
- Europe (13.5 million hectares);
- Latin America (7.1 million hectares),
- Asia (4.9 million hectares),
- North America (3.1 million hectares), and
- Africa (1.8 million hectares).

Oceania has 47 percent of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, has almost a quarter of the world's organic agricultural land followed by Latin America with 12 percent.

Apart from the organic agricultural land, there are further organic areas such as wild collection areas. These areas constitute more than 39.7 million hectares.

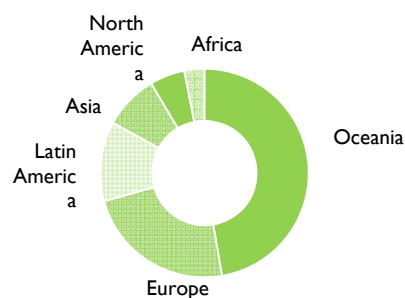
World: Organic agricultural land and other organic areas 2016



ORGANIC FARMLAND 2016



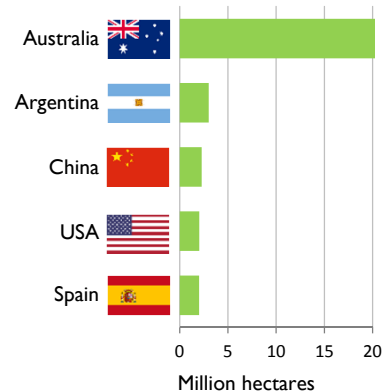
In Oceania there were 27.3 Mio ha, in Europe 13.5 Mio ha, and in Latin America 7.1 Mio ha.



Distribution of organic agricultural land by region 2016



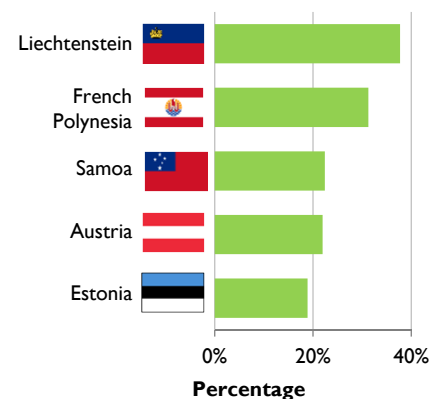
The ten countries with the largest organic agricultural areas have combined 76% of the world's organic agricultural land.



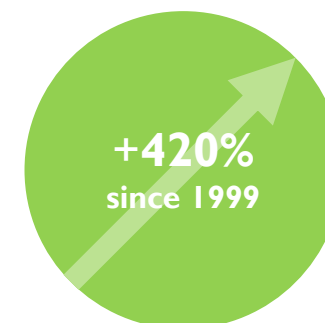
The five countries with the largest areas of organic agricultural land 2016



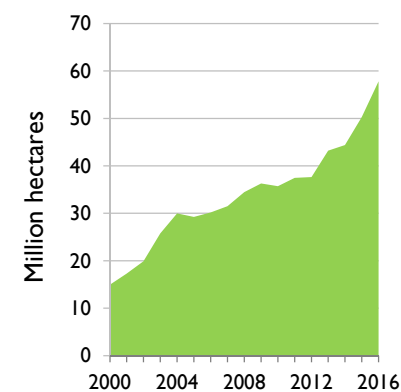
15 countries have 10% or more of their agricultural land under organic management.



Countries top five with more than 10 percent of organic agricultural land 2016



In 2016, over 7.5 million hectares were reported compared with 2015.

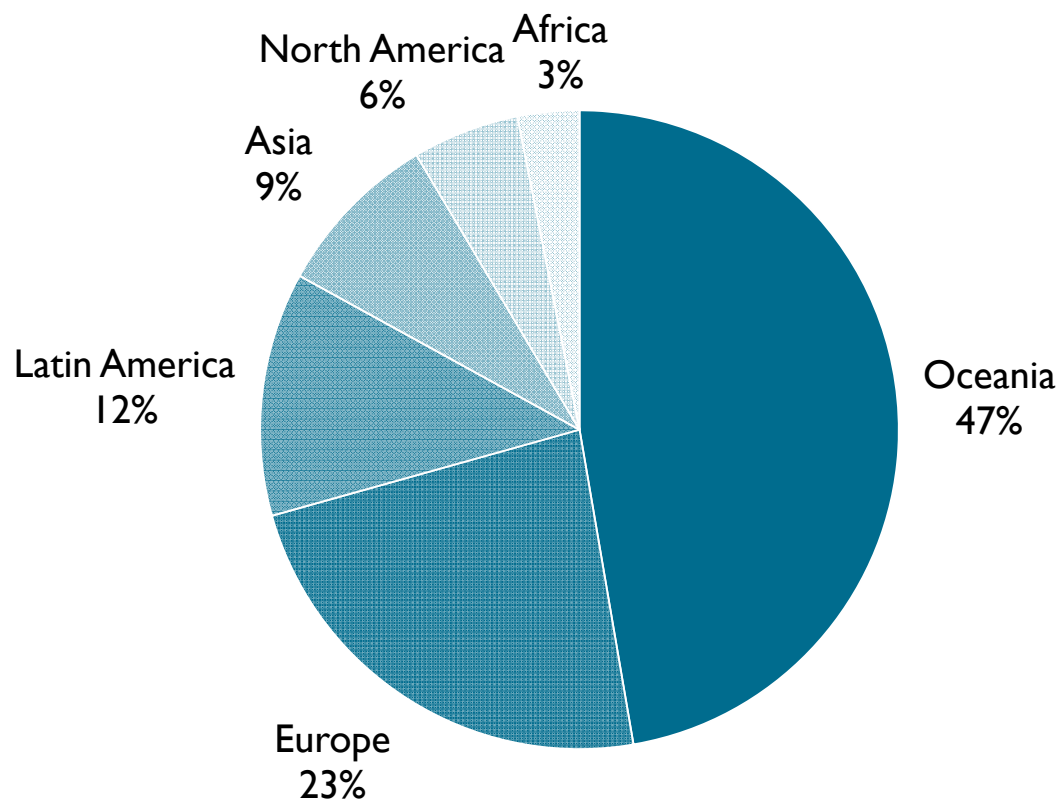


Growth of the organic agricultural land 2000-2016

World: Organic agricultural land by region 2016

Distribution of organic agricultural land by region 2016

Source: FiBL survey 2018



World: The countries with the most organic agricultural land 2016

Australia is the country with the most organic agricultural land, 97 percent of which is estimated to be extensive grazing area.

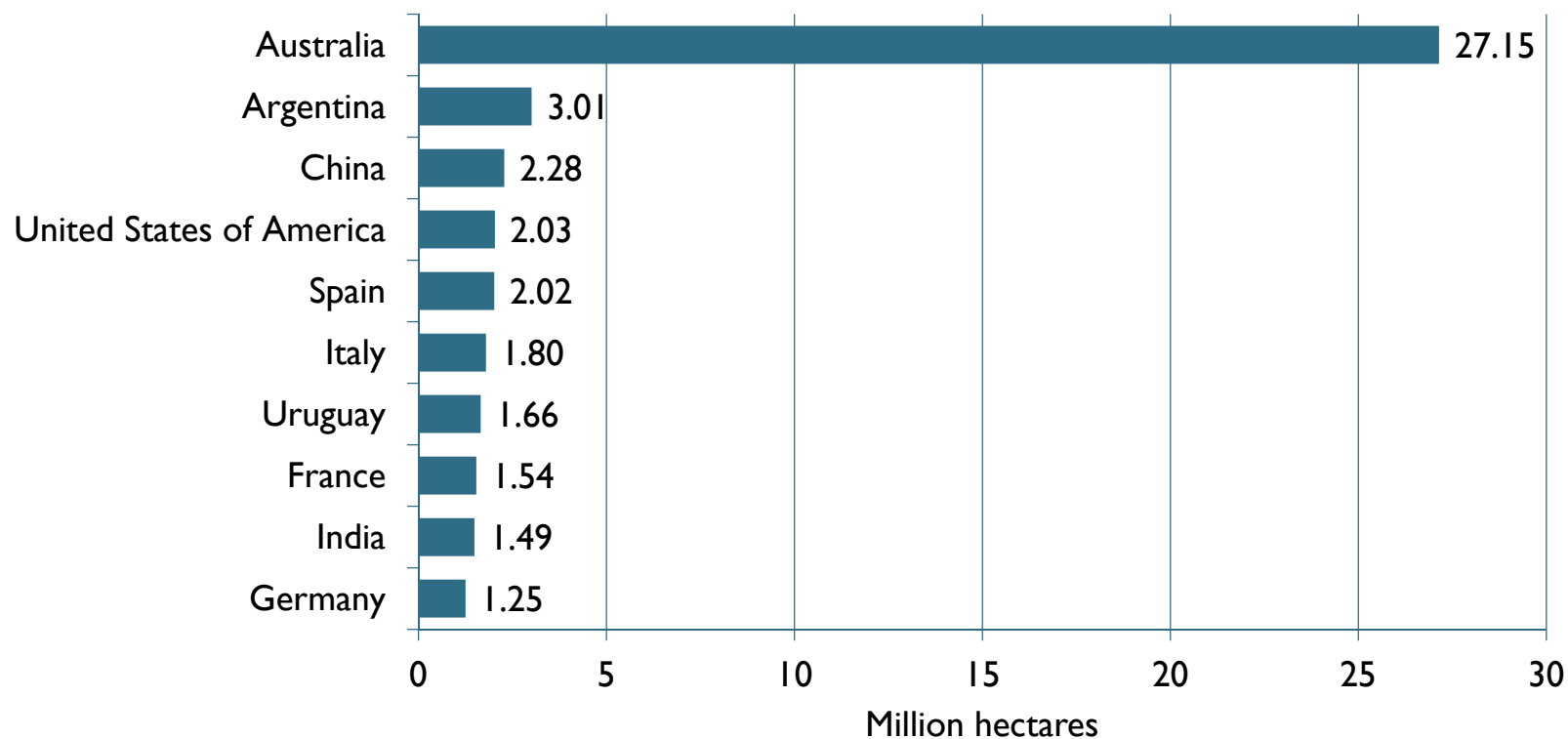
Argentina is second, followed by China in third place.

The ten countries with the most organically managed agricultural land have a combined total of 44.2 million hectares and constitute three-quarters of the world's organic agricultural land.

World: Organic agricultural land 2016: Top ten countries

The ten countries with the largest areas of organic agricultural land 2016

Source: FiBL survey 2018



World: Share of organic land of total agricultural area 2016

The share of the world's organic agricultural of all agricultural land is 1.2 percent.

By region, the share is highest in Oceania (6.5 percent), followed by Europe with 2.7 percent and Latin America with 0.9 percent.

In the European Union, the share of organically managed land is 6.7 percent. In the other regions, the share of organically managed land is less than one percent.

Fifteen countries have 10 percent organic land or more, and 17 countries have between 5 and 10 percent organic land.

However, almost 60 percent of the countries for which data are available have less than one percent organic agricultural land.

The country with the highest share is Liechtenstein (37.7 percent), followed by the French Polynesia (31.3 percent) and Samoa (22.4 percent).

It is interesting to note that many island states have high shares of agricultural land under organic management, such as the French Polynesia and Samoa.

World: Shares of organic agricultural land by region 2016

Table 4: World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2016

Region	Organic agr. land [ha]	Share of total agri. land
Africa	1'801'699	0.2%
Asia	4'897'837	0.3%
Europe	13'509'146	2.7%
Latin America	7'135'155	0.9%
North America	3'130'332	0.8%
Oceania	27'346'986	6.5%
World*	57'816'759	1.2%

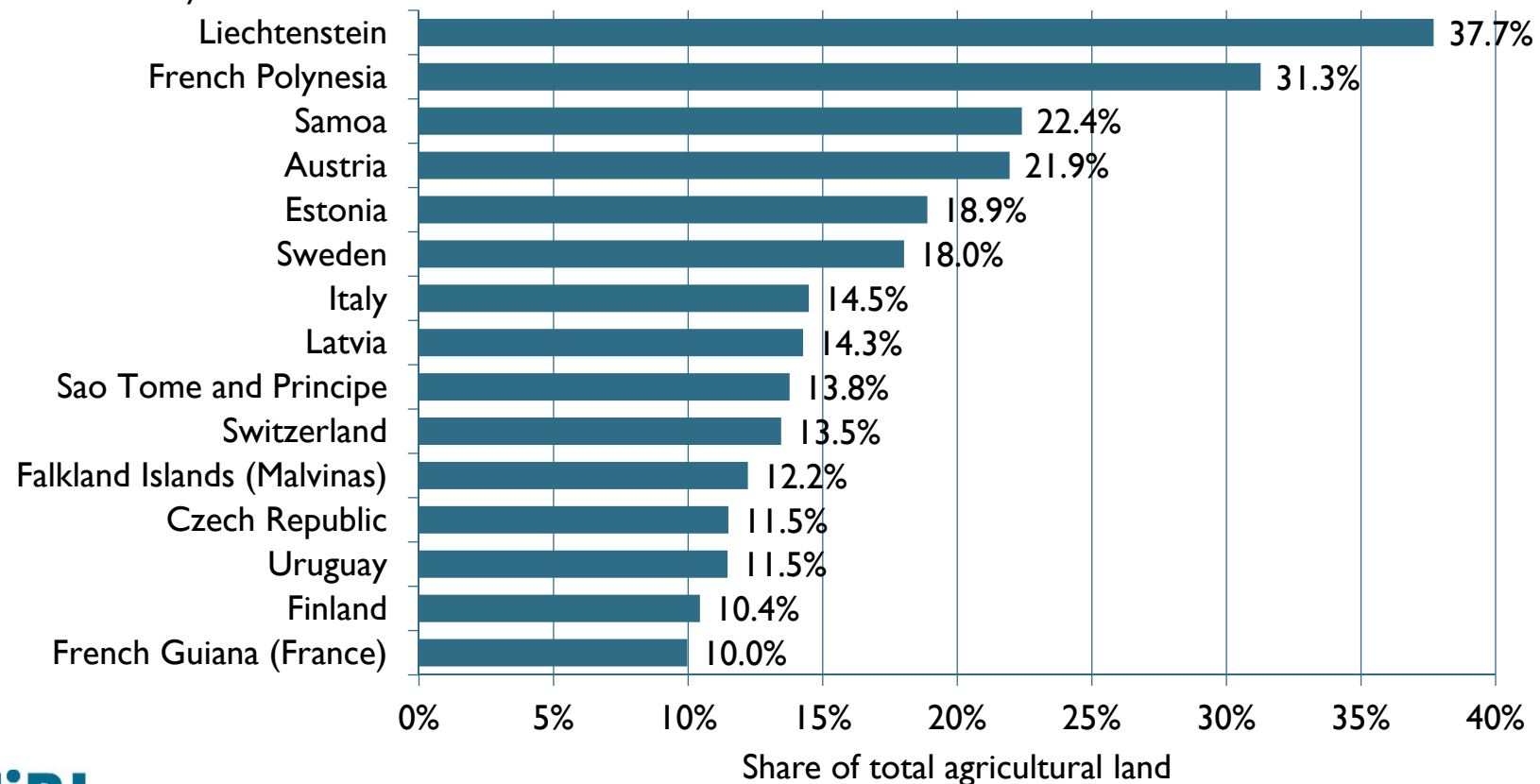
Source: FiBL survey 2018.

* Total includes correction value for French overseas departments.

World: The highest shares of organic agricultural land 2016

Countries with an organic share of at least 10 percent of the agricultural land 2016

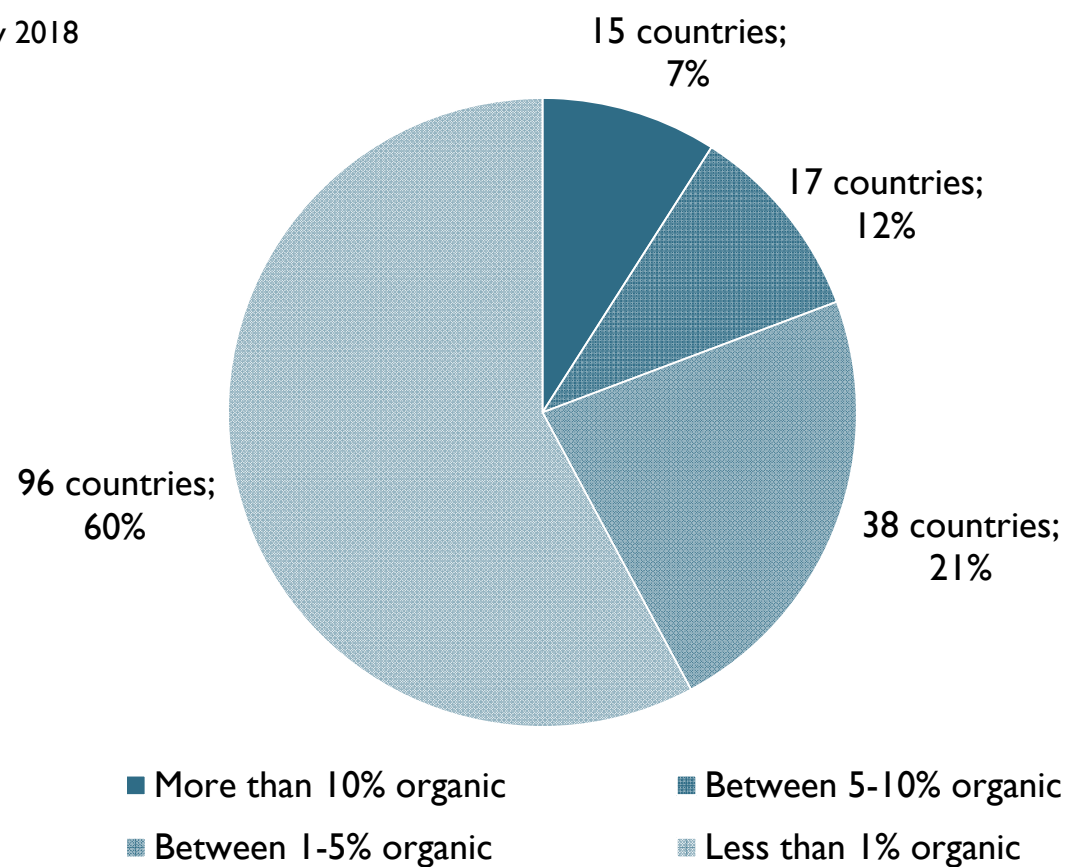
Source: FiBL survey 2018



World: Distribution of organic shares 2016

Distribution of the organic shares of the agricultural land 2016

Source: FiBL survey 2018



World: Growth of the organic agricultural land 2016

Compared with the revised data from 2015, the organic agricultural land has increased by 15 percent in 2016, 7.5 million hectares.

This increase is mainly due to the fact that 5 million additional hectares were reported from Australia. However, many other countries reported an important increase, thus contributing to the global increase of the organic land, like China (42 percent increase; over 0.67 million hectares more) and Uruguay (27 percent increase; almost 0.35 million hectares more), and India and Italy, both with an additional 0.3 million hectares.

Compared with 1999, when 11 million hectares were organic, organic agricultural land has increased five-fold.

Eighty-three countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 39 countries. In 51 countries, the organic agricultural area either did not change or no new data was received.

World: Growth of the organic agricultural land by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2015-2016

Region	Organic agr. land 2015 [ha]	Organic agr. land 2016 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Africa	1'682'788	1'801'699	+118'911	+7.1%	+939'348	+108.9%
Asia	3'965'289	4'897'837	+932'549	+23.5%	+1'995'140	+68.7%
Europe	12'663'914	13'509'146	+845'232	+6.7%	+5'717'098	+73.4%
Latin America	6'737'231	7'135'155	+397'924	+5.9%	+1'549'488	+27.7%
North America	2'973'885	3'130'332	+156'446	+5.3%	+837'975	+36.6%
Oceania	22'257'008	27'346'986	+5'089'977	+22.9%	+15'272'436	+126.5%
World*	50'276'260	57'816'759	+7'540'499	+15.0%	+26'307'088	+83.5%

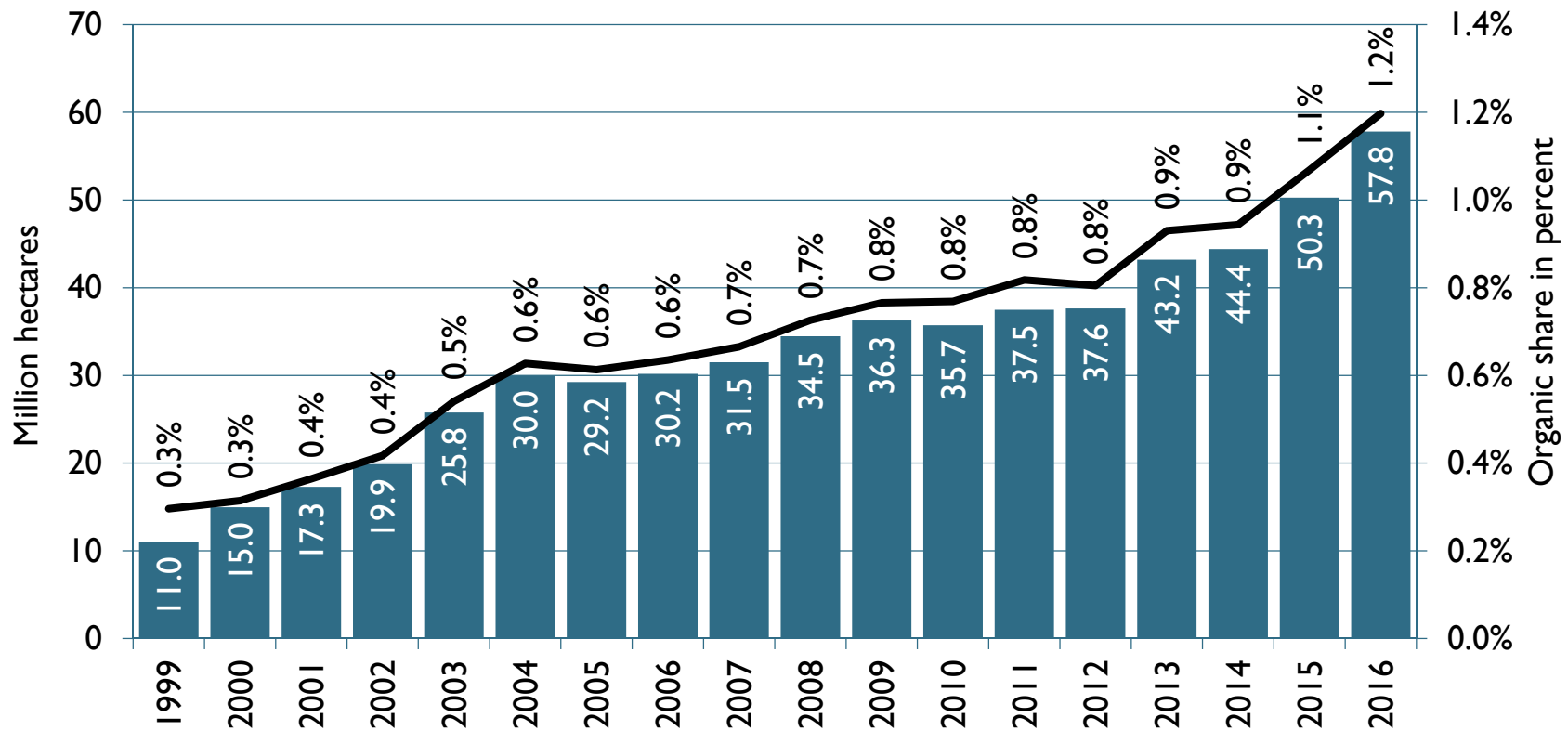
Source: FiBL survey 2018, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 330

* Total includes correction value for French Overseas Departments.

World: Growth of the organic farmland and organic share 1999-2016

Growth of the organic agricultural land and organic share 1999-2016

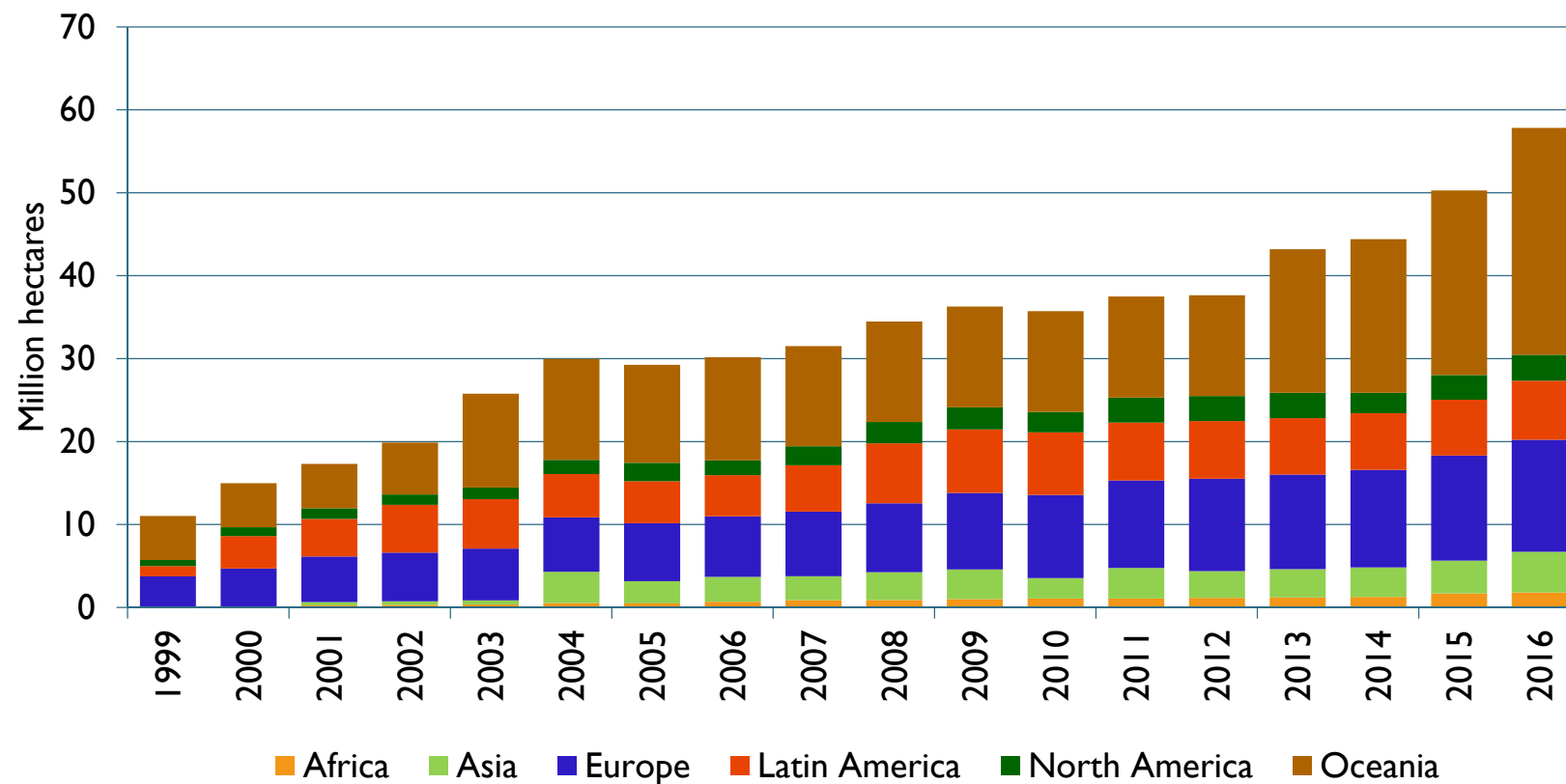
Source: FiBL-IFOAM-SOEL-Surveys 1999-2018



World: Development of organic agricultural land in the regions 2015

Development of organic agricultural land in the regions 1999-2016

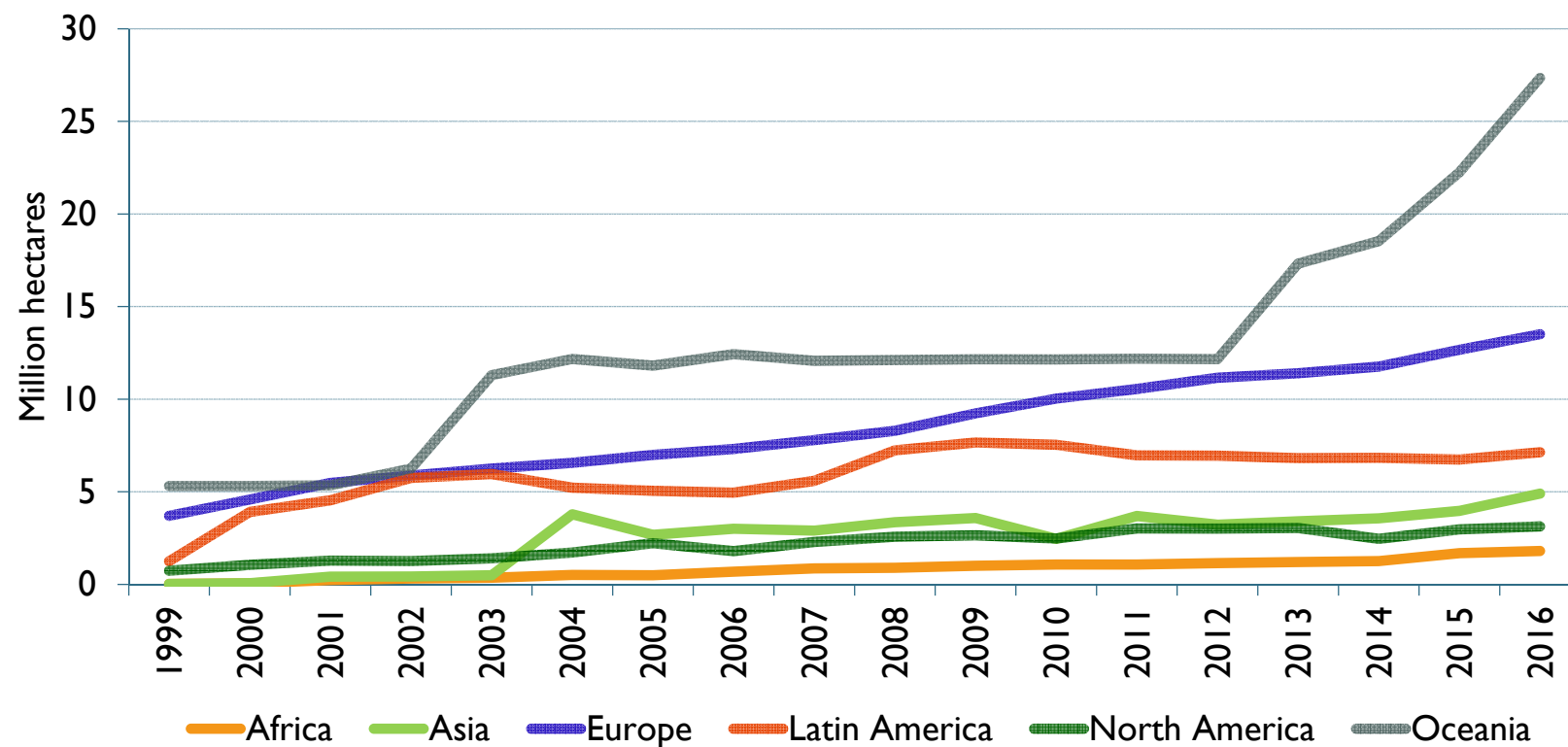
Source: FiBL-IFOAM-SOEL-Surveys 1999-2018



World: Growth of organic agricultural land by region 2016

Growth of the organic agricultural land by continent 1999-2016

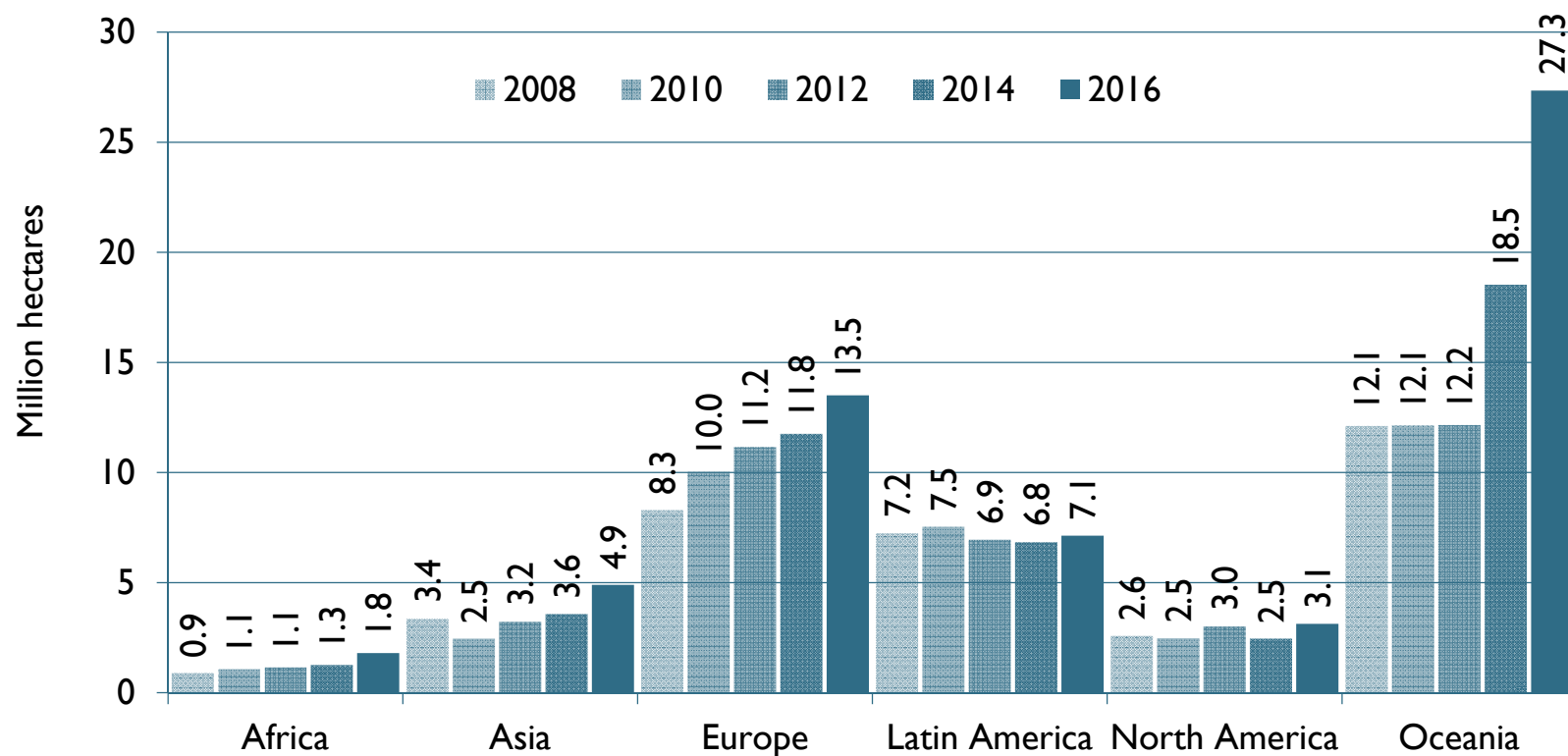
Source: FiBL-IFOAM-SOEL-Surveys 1999-2018



World: Growth of organic farmland by continent 2016

Growth of the organic agricultural land by continent 2008-2016

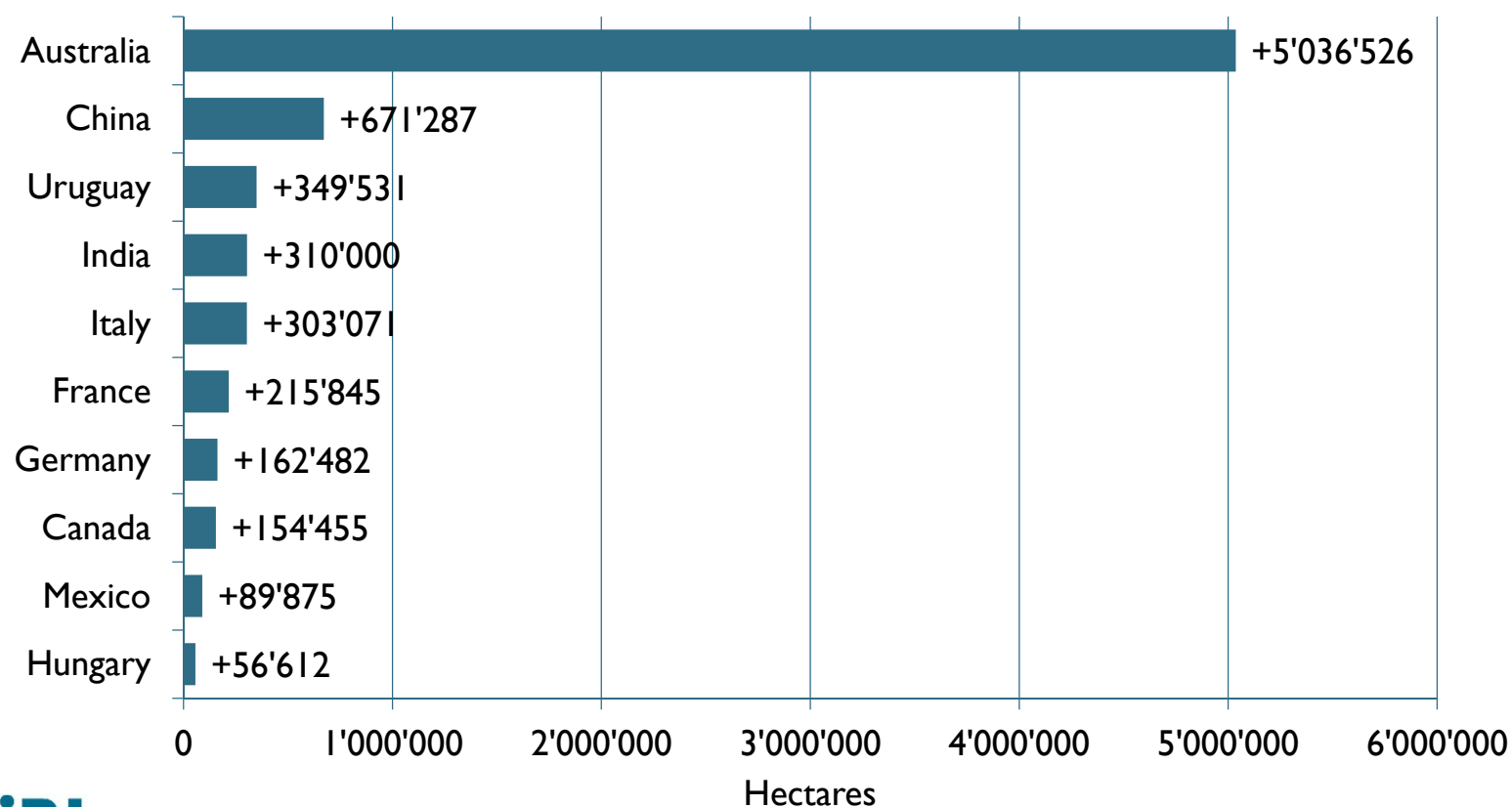
Source: FiBL-IFOAM survey 2010-2018



World: Growth of organic farmland 2015-2016

The ten countries with the highest increase of organic land 2016

Source: FiBL survey 2018



World: Further organic areas

Apart from the organic agricultural land there are further organic areas, the largest part of these are wild collection areas and areas for beekeeping.

Further areas are aquaculture, forest and grazing areas on non-agricultural land.

It should be noted, that many countries do not report these areas, as they only communicate the agricultural land.

The total area for these areas was more than 39.7 million hectares.

In total, 97.5 million hectares – agricultural land and other areas – were organic in 2016.

World: Wild collection and beekeeping areas

39.3 million hectares of wild collection and bee-keeping areas were reported for 2016.

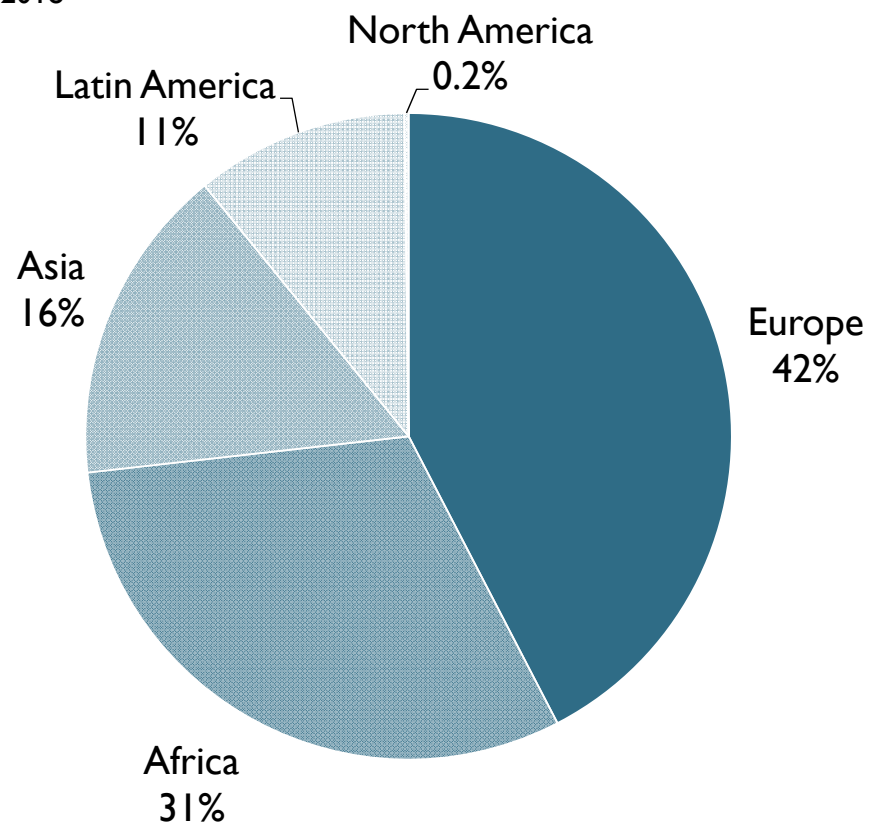
The wild collection / bee-keeping areas are more or less evenly distributed over four regions: Europe, Africa, Asia, and Latin America, reflecting quite a different pattern than that for agricultural land.

The collection of wild harvested crops is defined in the IFOAM Basic Standards (IFOAM 2014), and wild collection activities are regulated in organic laws.

World: Wild collection areas by region 2016

Distribution of organic wild collection and beekeeping areas by region 2016

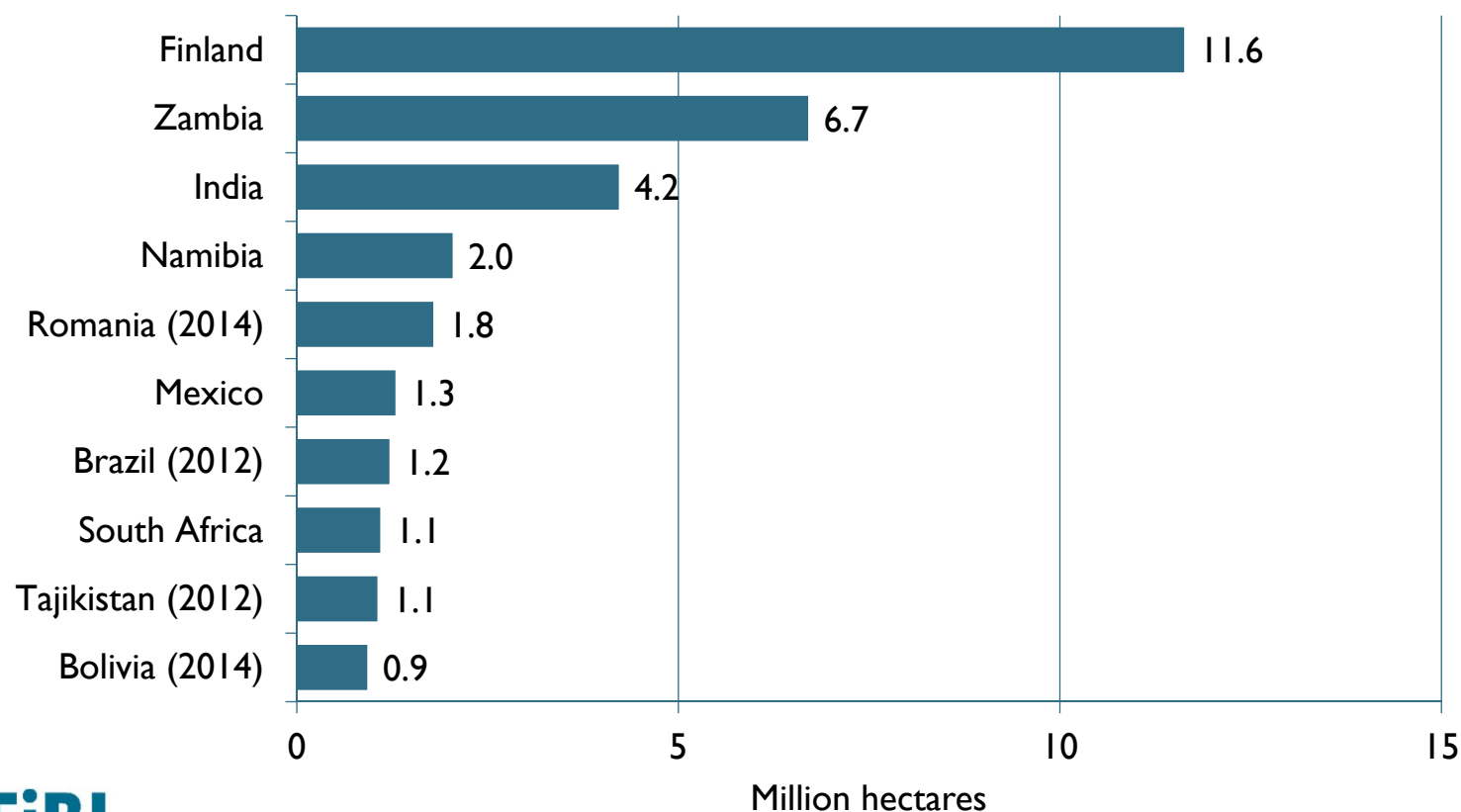
Source: FiBL survey 2018



World: Organic wild collection 2016: Top 10 countries

The ten countries with the largest wild collection and beekeeping areas 2016

Source: FiBL survey 2018



World: Organic producers 2016

For the current survey, a total of 2.7 million organic producers was reported,

According to the data obtained, more than three quarters of the producers are located in Asia, Africa and Latin America.

The country with the most producers is India (835'000), followed by Uganda (210'352) and Mexico (210'000).

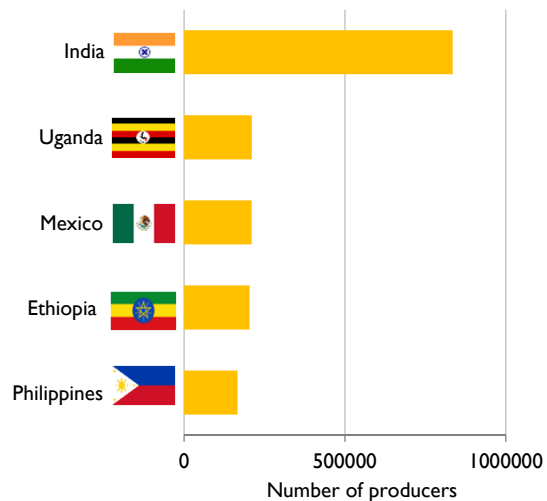
This is an increase of more than 300'000 producers compared with 2015, or 13 percent.

It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2.7 million.

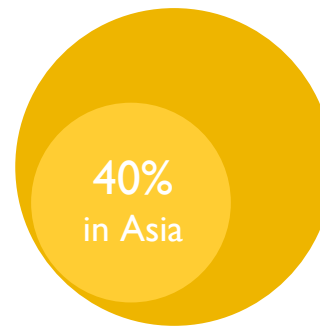
ORGANIC PRODUCERS 2016



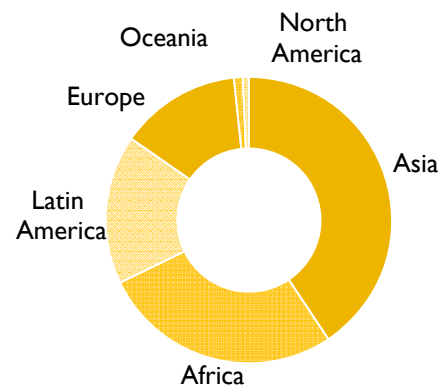
The country with the most organic producers is India, followed by Uganda and Mexico.



The five countries with the largest numbers of organic producers 2016



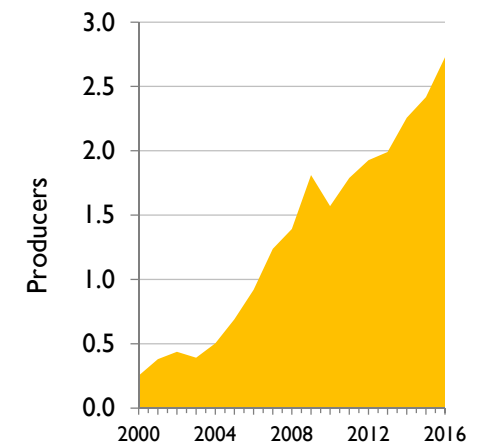
More than 84% of the producers are in Asia, Africa, and Latin America.



Distribution of organic producers by region 2016



There has been an increase in the number of producers by more than 300'000, or over 13% since 2015.

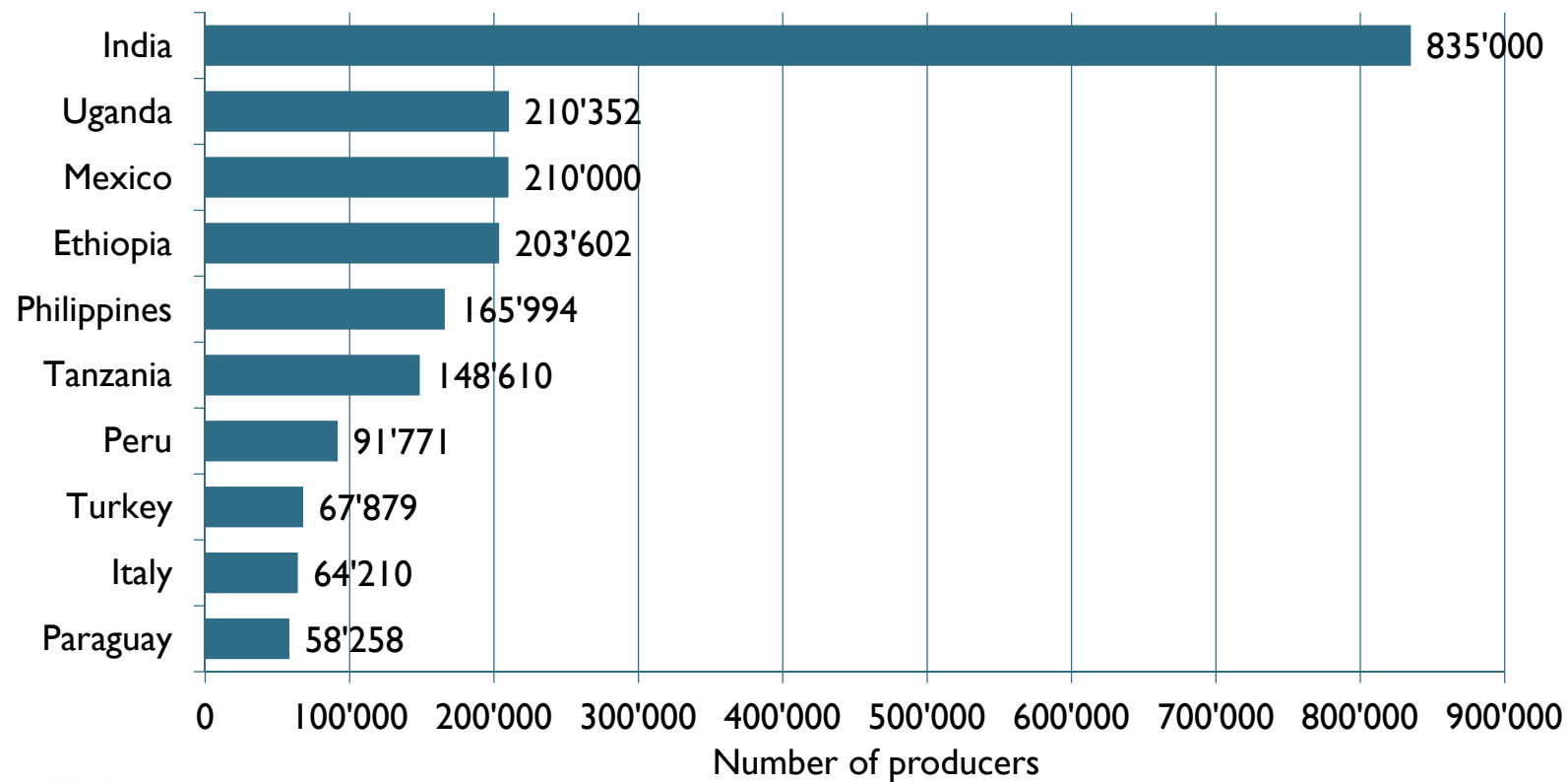


Development of the number of organic producers 1999-2016

World: Organic producers 2016

The ten countries with the largest numbers of organic producers 2016

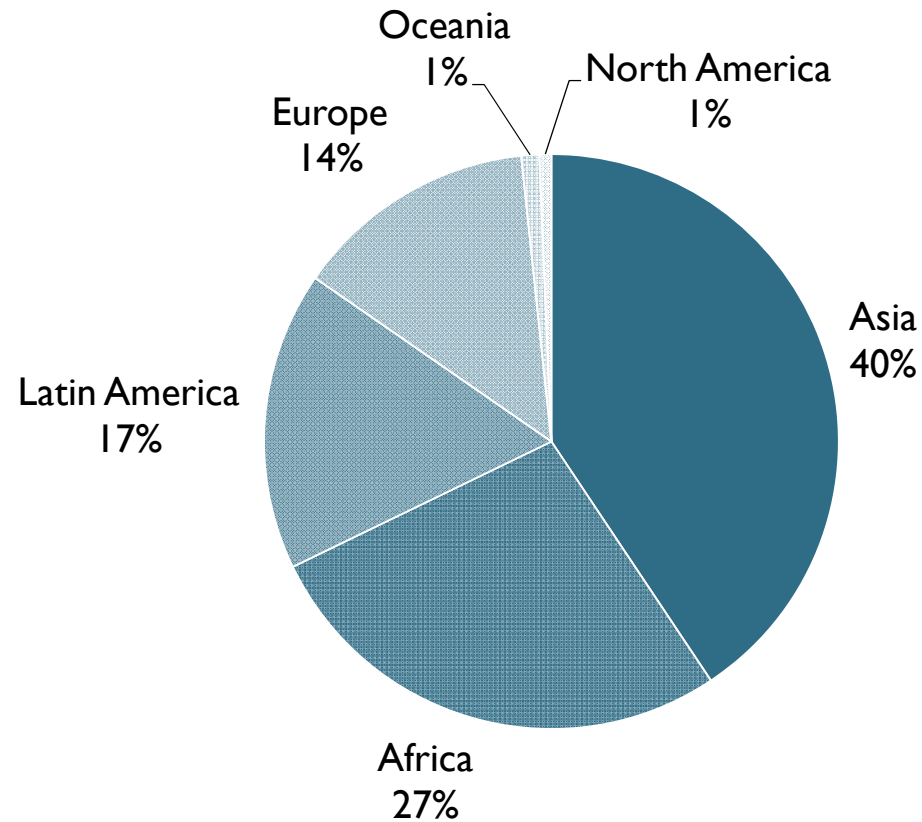
Source: FiBL survey 2018



World: Organic producers by region 2016

Distribution of organic producers by region 2016

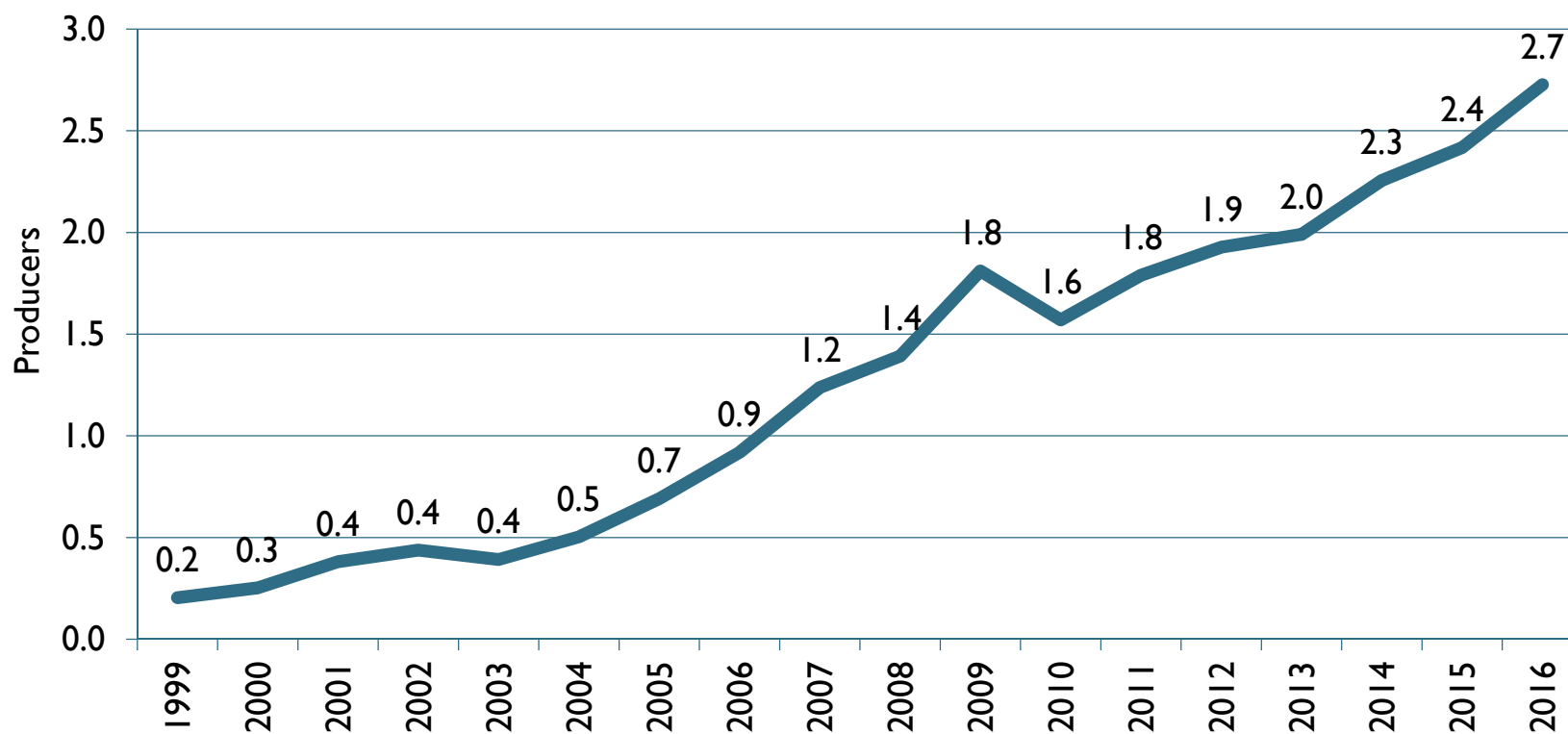
Source: FiBL survey 2018



World: Development of organic producers 1999-2016

Development of the number of organic producers 1999-2016

Source: FiBL-IFOAM-SOEL-Surveys 1999-2018



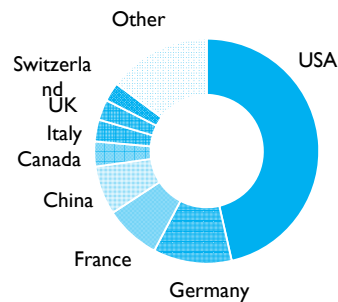
World: The global market for organic food and beverages 2016

- In 2016, the global market for certified organic food and drink was estimated to be 89.7 billion US Dollars according to Organic Monitor (Sahota 2018).
- The turnover with organic products has more than threefold since 2000.
- Ninety percent of the organic product revenues is made in the North America and Europe.
- In 2016, the by far largest market was the United States with 38.9 billion euros of organic food sales, followed by Germany with 9.5 billion euros and France with 6.7 billion euros (FiBL-AMI survey 2018).
- The highest annual per capita consumption was in Switzerland (274 euros) and in Denmark (227 euros) (FiBL-AMI survey 2018).
- Denmark, Luxembourg and Switzerland have the highest share of organic food sales. In 2016 total food market value was not available for most of the countries, and it was therefore not possible to calculate the organic share for most countries.

WORLD: ORGANIC RETAIL SALES 2016

World
over
80 billion €

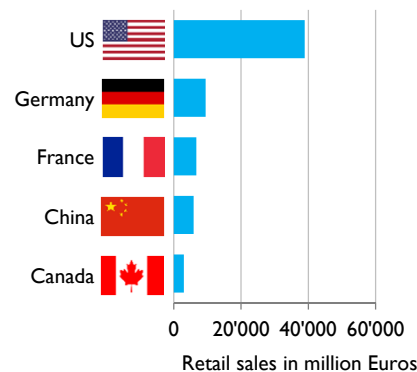
The largest single market is the USA followed by the EU (30.7 billion €) and China. By region, North America has the lead (41.9 billion €), followed by Europe (33.5 billion €) and Asia.



Distribution of retail sales value by country 2016

North America
almost
42 billion €

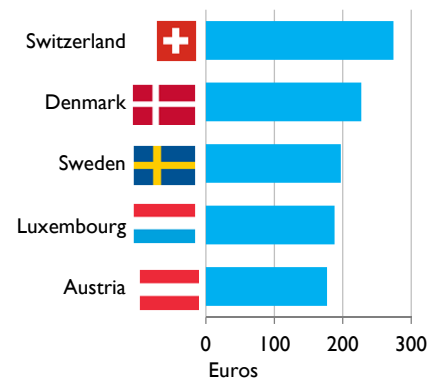
The countries with the largest market for organic food are the United States (38.9 billion €), followed by Germany (9.5 billion €), France (6.7 billion €) and China (5.9 billion €).



The five countries with the largest markets for organic food 2016

274€
are spent per
person in
Switzerland

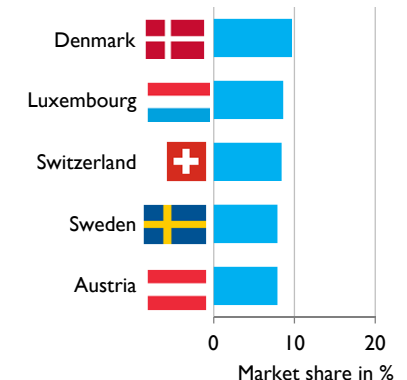
Switzerland has the highest per capita consumption worldwide, followed by Denmark and Sweden.



The five countries with the highest per capita consumption 2016

9.7%
of the
food market
in Denmark is
organic

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

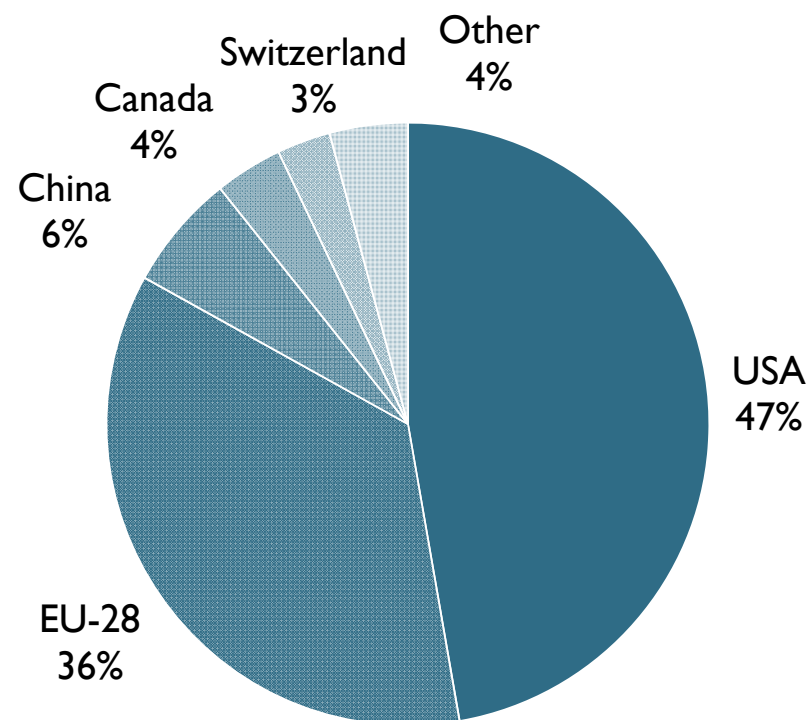


The five countries with the highest organic shares of the total market 2016

World: Global market: Distribution of retail sales by single market 2016

World: distribution of retail sales by single market 2016

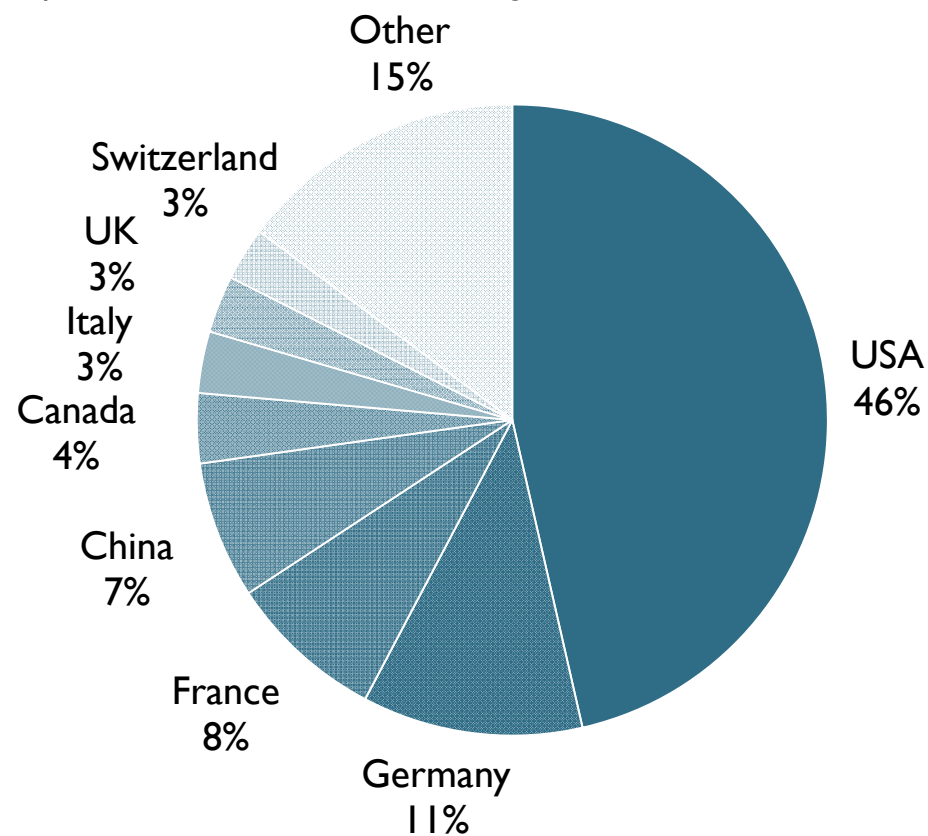
Source: FiBL-AMI survey 2018



World: Distribution of organic retail sales 2016

Global market: Distribution of retail sales value by country 2016

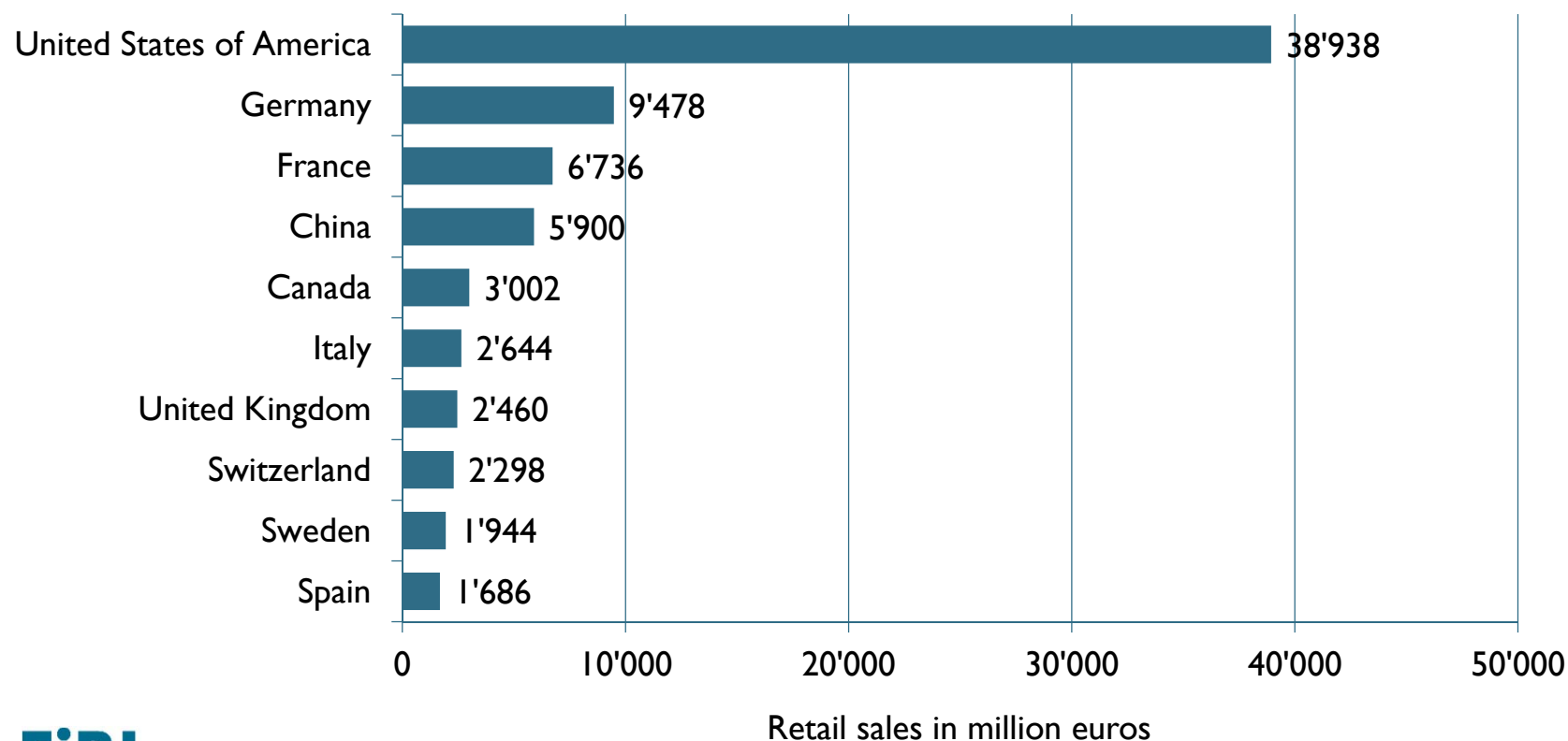
Source: FiBL-AMI survey 2018, based on retail sales with organic food



World: The largest markets for organic food 2016

The ten countries with the largest markets for organic food 2016

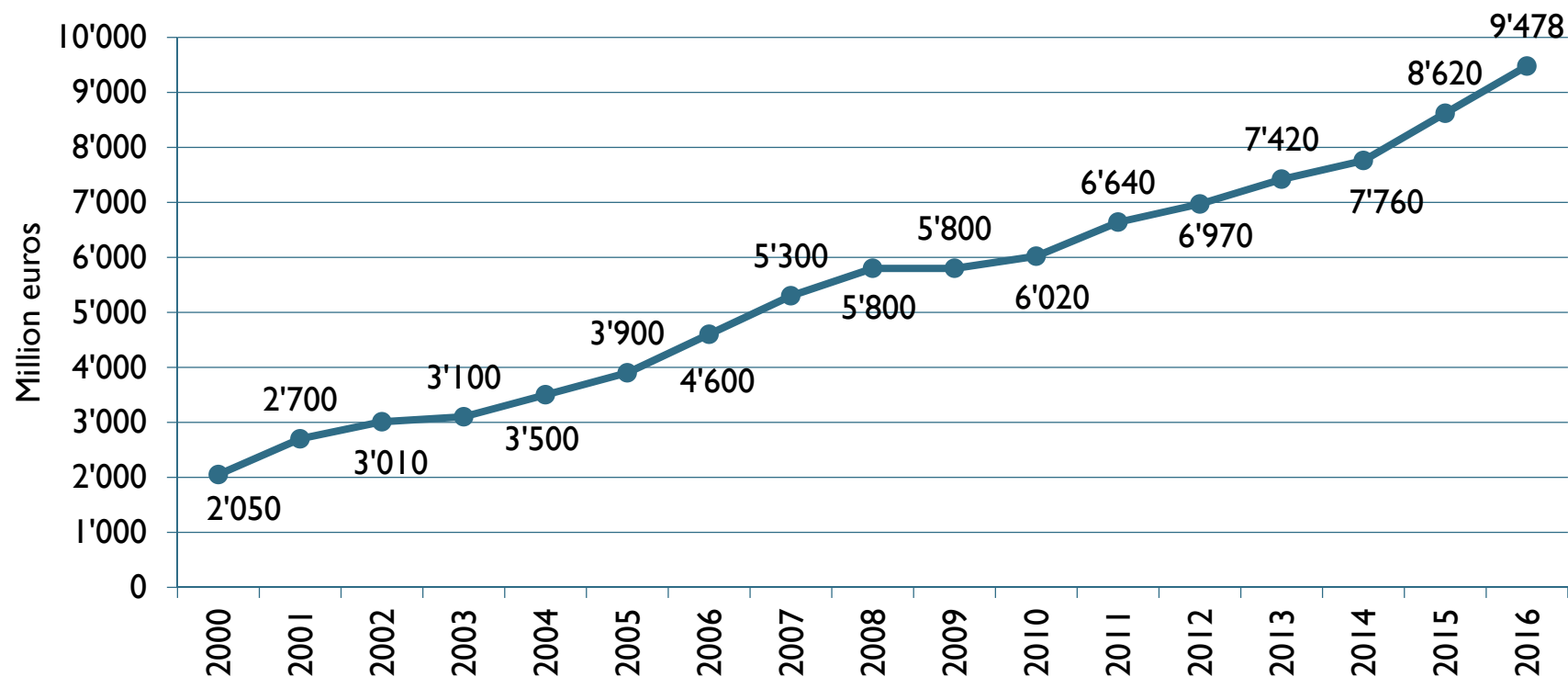
Source: FiBL-AMI survey 2018



Germany: Growth of retail sales in Germany 2000-2016

Germany: Growth of organic food and beverages retail sales 2000-2016

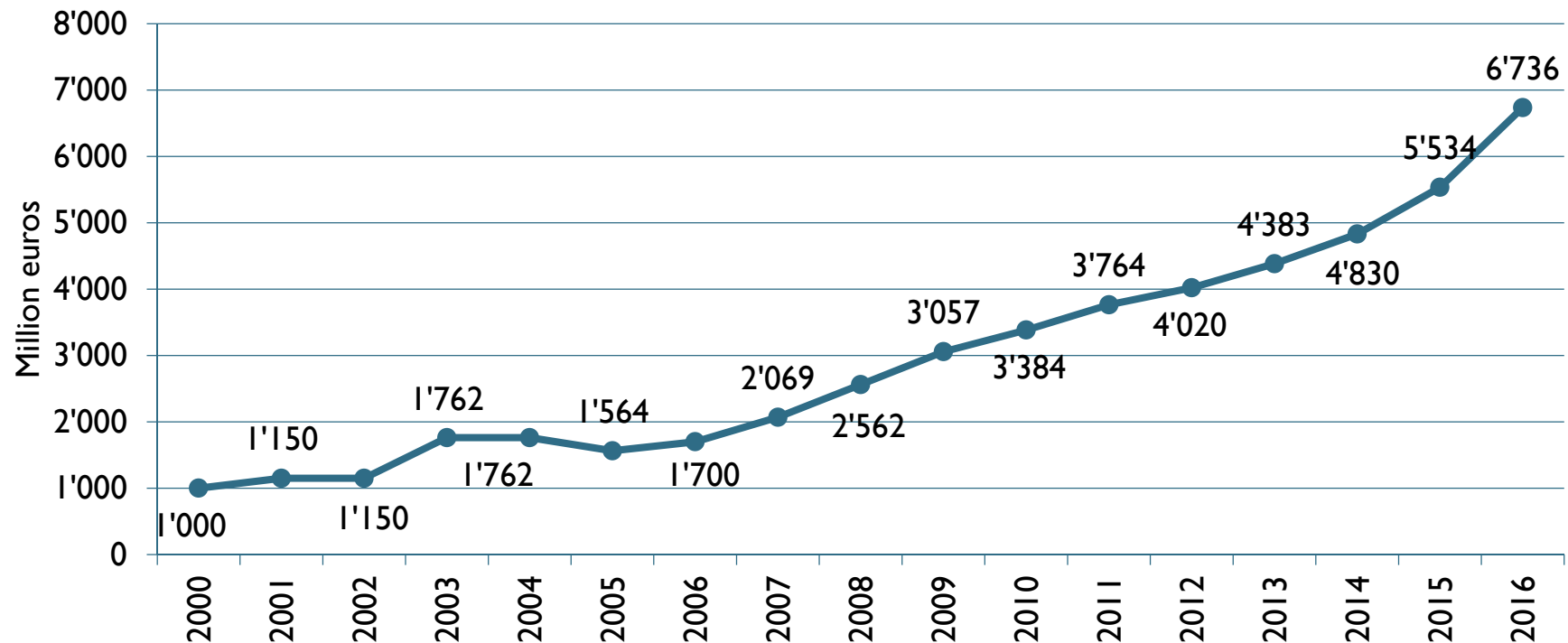
Source: FiBL-AMI surveys 2000-2018



France: Growth of retail sales in France 2000-2016

France: Growth of organic food and beverages retail sales 2000-2016

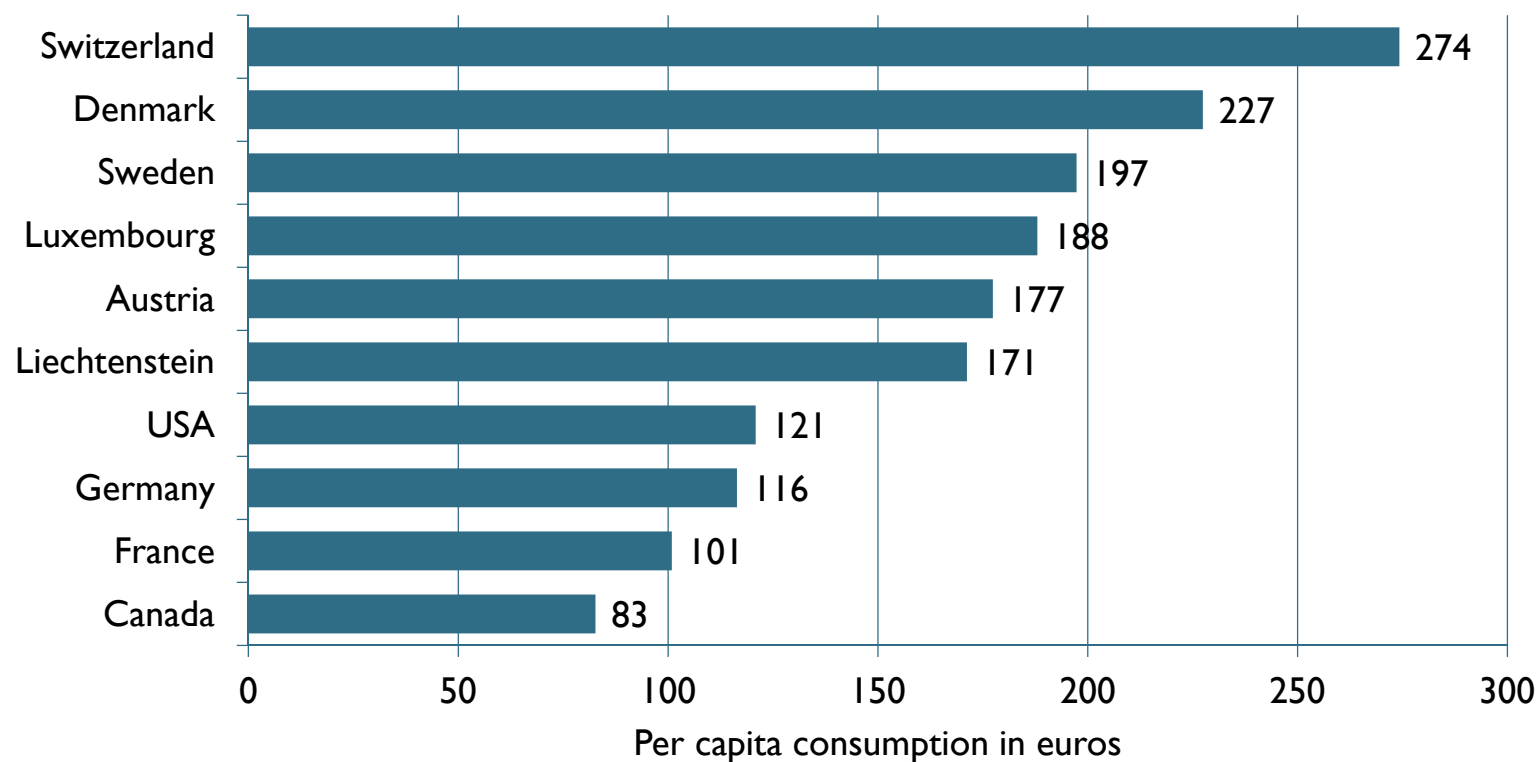
Source: FiBL-AMI surveys 2000-2018



World: Per capita consumption 2016

The ten countries with the highest per capita consumption 2016

Source: FiBL-AMI survey 2018



World: Organic farming in developing and transition countries 2016

- Almost a quarter of the world's organic agricultural land – 14.3 million hectares - is located in developing/transition countries and in emerging markets.* Most of this land is in Latin American countries, with Asia and Africa in second and third place.
- 2.4 million producers are in these countries.
- *Countries listed in the List of Recipients of Official Development Assistance (ODA) of the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD). The list is available at <https://www.oecd.org/dac/stats/documentupload/DAC%20List%20of%20ODA%20Recipients%202014%20final.pdf>

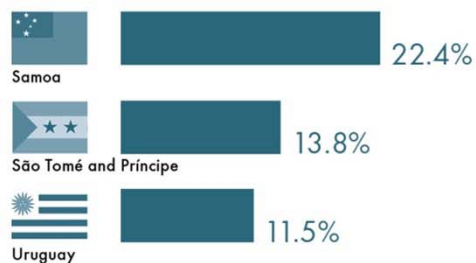
Organic Agriculture in Low & Middle Income Countries 2016

Organic Farmland 2016

Top 3 countries (largest organic area)

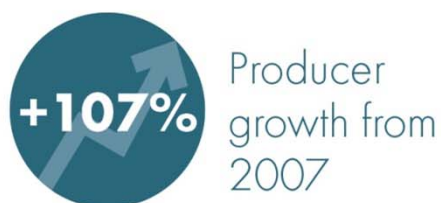


Organic share of total farmland:
Top 3 countries

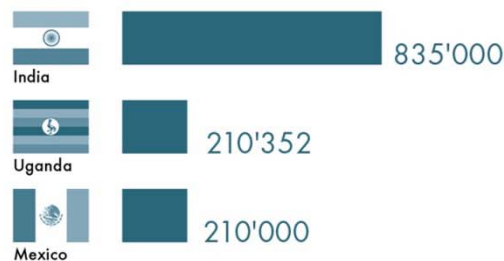


Organic Producers 2016

The number of organic producers is increasing

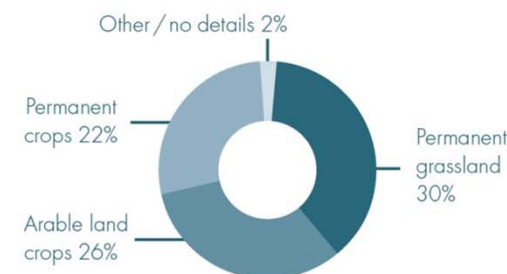


Number of producers:
Top 3 countries

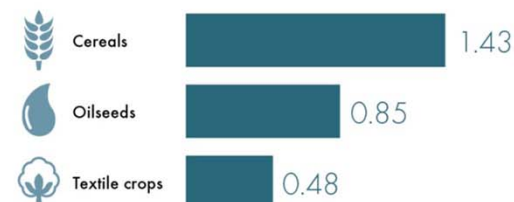


Organic Land Use 2016

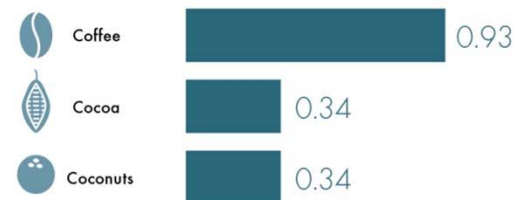
Land use 2016



Key arable crops
(million hectares)



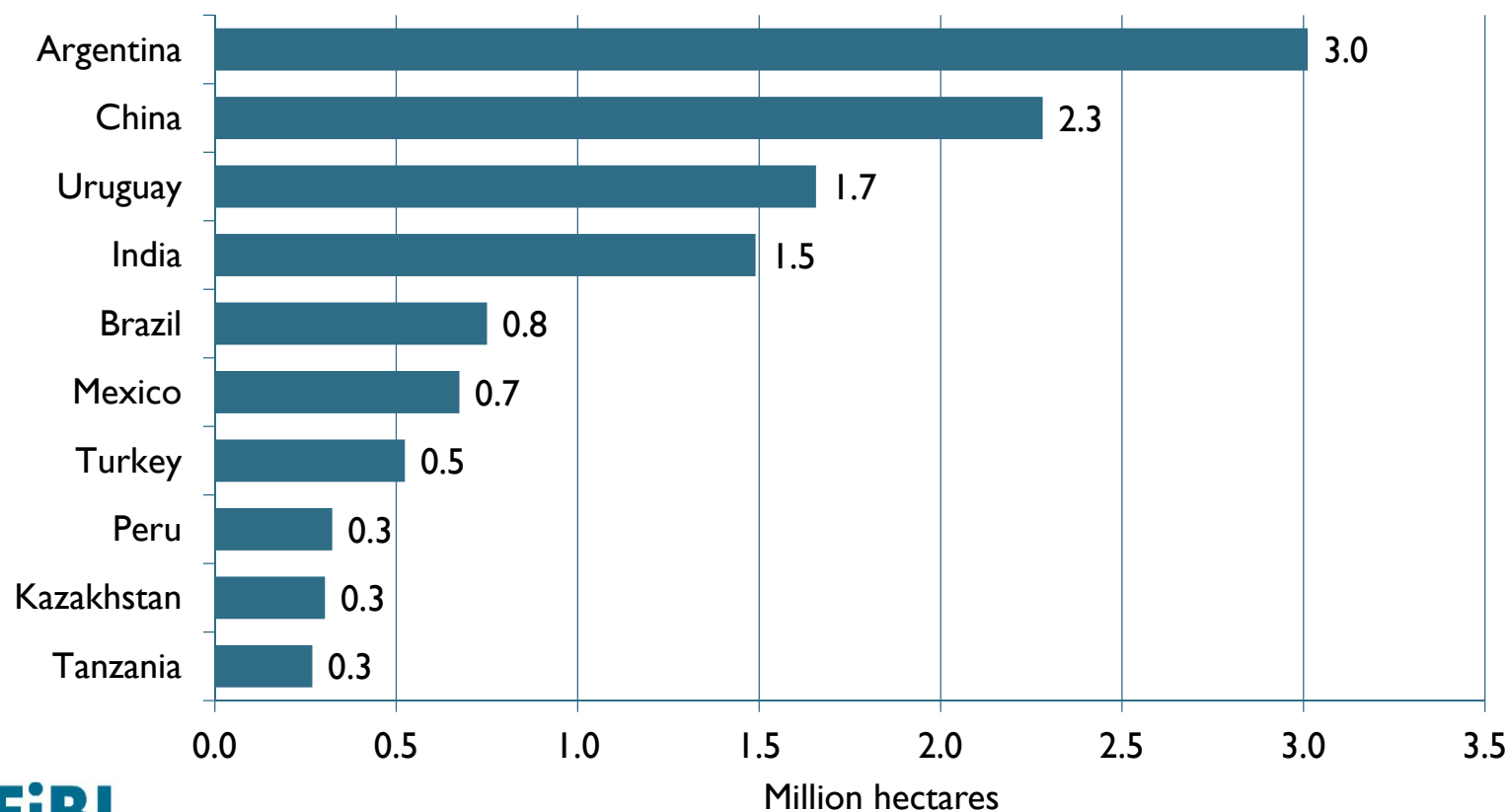
Key permanent crops
(million hectares)



World: DAC list: The top 10 countries with the largest areas of organic agricultural land 2016

The ten countries on the DAC list with the largest areas of organic agricultural land 2016

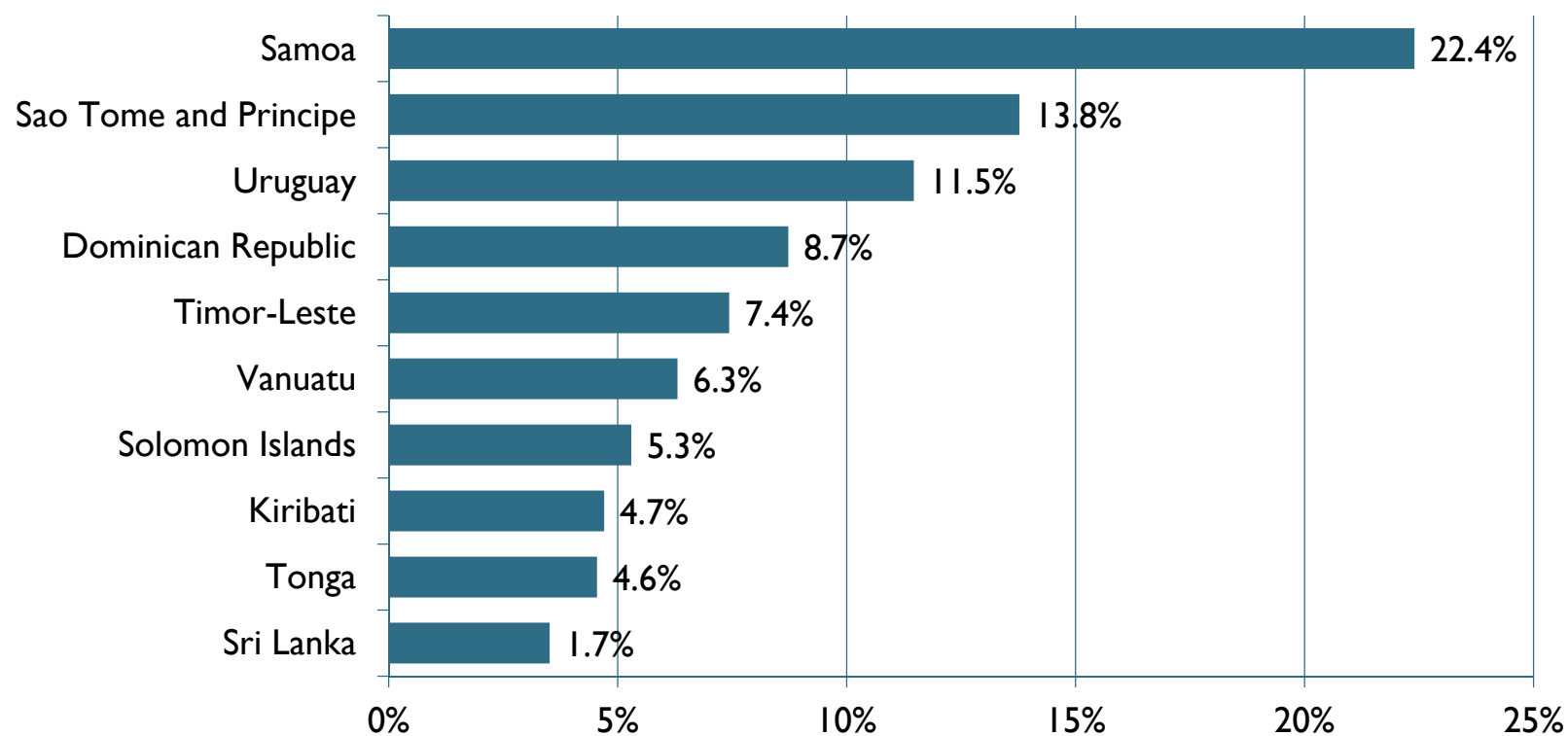
Source: FiBL survey 2018



World: DAC list: The top 10 countries with the highest shares of organic agricultural land 2016

The ten countries on the DAC list with the highest organic shares of the total agricultural land 2016

Source: FiBL survey 2018



More information

More information (PDF, data sources, graphs) at <http://www.organic-world.net/yearbook/yearbook-2018.html>

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