Organic Agriculture Worldwide:
Key results from the survey on organic agriculture worldwide 2012
Part 1: Global data and survey background

Available online at: http://www.organic-world.net/yearbook-2012-presentations.html

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

For updates check www.organic-world.net

Frick, June 22, 2012

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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
The World of Organic Agriculture 2011

› The 13th edition of ‘The World of Organic Agriculture’, was published by FiBL and IFOAM in February 2012.*

› Contents:
  › Results of the survey on organic agriculture worldwide;
  › Organic agriculture in the regions and country reports;
  › Australia, Azerbaijan, Benin, Bulgaria, Canada, Ethiopia, Iran, Pacific Islands, Peru, Thailand, Turkey and United States.
  › Chapters on the global market, standards & legislations, voluntary standards, PGS and European market.
  › Numerous tables and graphs.
  › The book can be ordered via IFOAM.org and shop.FiBL.org.

Website www.organic-world.net

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

› There are 3 presentations summarizing the key results of the FiBL/IFOAM survey on organic agriculture worldwide 2012 (data 2010). Apart from the global data, key results on crop and on regional data are presented.

› More information is available at the password area of www.organic-world.net

› The following three presentations are available at http://www.organic-world.net/yearbook-2012-presentations.html:

  › Data background and key data on organic agriculture: Land, producers, market data 2010; Organic agriculture in developing countries 2010

  › Land use and key crops in organic agriculture 2010

  › Organic agriculture in the regions 2010
The 13th Survey on organic agriculture worldwide

› The 13th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in cooperation with the International Federation of Organic Agriculture Movements (IFOAM) and further partners.
› The survey was carried out between July 2011 and February 2012.
› Data were received from 160 countries.
› New country included: French Polynesia.
› Updated data on area and producers were available for 134 countries.
› Data were provided by almost 200 country experts (representatives from NGOs, certification bodies, governments, researchers).
› The following data were collected: Area data (including land use and crop details); Producers, other operator types; Domestic market values; Exports and imports. Livestock data (animal heads and production tones);
## Countries and territories covered by the global survey on organic agriculture 2010

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

Source: FiBL-IFOAM Survey 2012
Organic data collection systems world-wide 2010 for data on area, operators and production (total 160 countries)

- Government collection systems (70 countries)
  - Data from the certifiers
  - Census/farm structure survey
  - Direct payments
- Private collection systems (35 countries)
  - Data from the certifiers
  - Company data
- No collection system (55 countries)
  - FiBL and IFOAM collect the data from the international certifiers

Source: FiBL and IFOAM 2012
International certifiers that provided data for several countries (2010 data)
Networks, transnational data collection efforts

CIHEAM - IAMB

RUTA

EKOconnect

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General notes on the data

- 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 organic agricultural land, based on the Eurostat and FAOSTAT data, might differ from the organic shares obtained from ministries or local experts.
- Producers: Some countries report the number of smallholders, and others only the 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 are communicated at the data revision pages of Organic-World.net: http://www.organic-world.net/statistics-data-revisions.html.
Key data/indicators on organic agriculture world-wide 2010

› 160 countries have data on organic agriculture.
› 37 million hectares of agricultural land are organic (including conversion areas).
› Compared with 2009, the organic agricultural land remained stable (-0.1 percent or a decrease of 50,000 hectares).
› 7 countries have more than ten percent organic agricultural land, 18 countries have between 5 and 10 percent organic agricultural land.
› There are 43 million hectares of further, non agricultural areas (up from 41 million hectares in 2009).
› 1.6 million producers were reported.
Definition of organic areas

- Agricultural land (37 million hectares in 2010)
  - 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 (43 million hectares in 2010)
  - Wild collection/Bee keeping
  - Forest
  - Aquaculture
  - Grazing areas on non-agricultural land
Currently 37 million hectares are under organic agricultural management (end of 2010 for most data).

The distribution of the organic agricultural land is as follows:

- Oceania (12.14 million hectares);
- Europe (10 million hectares);
- Latin America (8.4 million hectares);
- Asia (2.8 million hectares);
- North America (2.7 million hectares), and
- Africa (1.1 million hectares).

Oceania has almost one-third of the global organic agricultural land, but its relative importance is decreasing. Europe, a region that has had a very constant growth of organic land over the years, has more than one quarter of the world’s organic agricultural land. The share of Latin America is slightly lower than that of Europe (22.7 percent).

In addition to the agricultural land, there are 43 million hectares of non-agricultural areas, mainly wild-collection.

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IFOAM
Organic agricultural land and other organic areas 2010

Source: FiBL & IFOAM Survey 2012
Distribution of organic agricultural land by region 2010

- Europe: 27%
- Latin America: 23%
- Oceania: 33%
- Asia: 7%
- Northern America: 7%
- Africa: 3%

Source: FiBL & IFOAM Survey 2012
The countries with the most organic agricultural land 2010

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

› Argentina is second, followed by the United States in third place.

› The ten countries with the most organically managed agricultural land have a combined total of 26.63 million hectares, constituting almost three quarters of the world’s organic agricultural land.
World: The ten countries with the most organic agricultural land 2010

- Australia (2009): 12.00
- Argentina: 4.18
- United States (2008): 1.95
- Brazil (2007): 1.77
- Spain: 1.46
- China: 1.39
- Italy: 1.11
- Germany: 0.99
- Uruguay (2006): 0.93
- France: 0.85

Source: FiBL/IFOAM Survey 2012, based on data from governments, the private organic sector and certifiers.
Share of organic land of total agricultural area 2010

- The share of the world’s organic agricultural of all agricultural land is 0.9 percent.
- By region, the share is highest in Oceania (2.9 percent), followed by Europe with 2.1 percent and Latin America with 1.4 percent.
- In the 27 countries of the European Union, the share of organically managed land is 5.1 percent. In the other regions, the share of organically managed land is less than one percent.
- Seven countries have more than 10 percent organic land and 18 countries have between 5 and 10 percent organic land.
- However, 63 percent of the countries for which data are available have less than one percent organic agricultural land.
- The country with the highest share is the Falkland Islands (Malvinas), where several large sheep farms are working organically, followed by Liechtenstein (27.3 percent) and Austria (19.7 percent).
- It is interesting to note that many island states have high shares.
Share of organic agricultural land by region
2010

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

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

Source: FiBL-IFOAM Survey 2012.
For the calculation of the shares of total agricultural land, only the countries that are included in the survey were used.
The ten countries/areas with the highest shares of organic agricultural land 2010

Falkland Islands (Malvinas) 35.9%
Liechtenstein 27.3%
Austria 19.7%
Sweden 14.1%
Estonia 12.5%
Switzerland 11.4%
Czech Republic 10.5%
Latvia 9.4%
Slovakia 9.0%
Italy 8.7%

Source: FiBL/IFOAM Survey 2012, based on data from governments, organic sector organisations and certifiers.
Distribution of organic shares of the total agricultural areas 2010 (total countries 160)

- More than 10% organic
- Between 5-10% organic
- Between 1-5% organic
- Less than 1% organic

Source: FiBL & IFOAM Survey 2012
Growth of the organic agricultural land 2010

- Compared with the revised data from 2009, the organic agricultural land has decreased by 50 thousand hectares, or by 0.1 percent in 2010.
- Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has more than trebled.
# Growth of the organic agricultural land 2000-2010 by region

## Table: Growth of the organic agricultural land by region 2000-2010 in million hectares

<table>
<thead>
<tr>
<th>Region</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>0.05</td>
<td>0.23</td>
<td>0.32</td>
<td>0.36</td>
<td>0.51</td>
<td>0.49</td>
<td>0.69</td>
<td>0.86</td>
<td>0.86</td>
<td>1.03</td>
<td>1.08</td>
</tr>
<tr>
<td>Asia</td>
<td>0.06</td>
<td>0.42</td>
<td>0.43</td>
<td>0.49</td>
<td>3.78</td>
<td>2.68</td>
<td>3.00</td>
<td>2.89</td>
<td>3.35</td>
<td>3.57</td>
<td>2.78</td>
</tr>
<tr>
<td>Europe</td>
<td>4.50</td>
<td>5.43</td>
<td>5.80</td>
<td>6.20</td>
<td>6.35</td>
<td>6.76</td>
<td>7.27</td>
<td>7.77</td>
<td>8.27</td>
<td>9.20</td>
<td>10.00</td>
</tr>
<tr>
<td>Latin America</td>
<td>3.91</td>
<td>4.54</td>
<td>5.75</td>
<td>5.96</td>
<td>5.22</td>
<td>5.06</td>
<td>4.95</td>
<td>6.42</td>
<td>8.07</td>
<td>8.49</td>
<td>8.39</td>
</tr>
<tr>
<td>Northern America</td>
<td>1.06</td>
<td>1.28</td>
<td>1.26</td>
<td>1.41</td>
<td>1.72</td>
<td>2.22</td>
<td>1.79</td>
<td>2.29</td>
<td>2.58</td>
<td>2.65</td>
<td>2.65</td>
</tr>
<tr>
<td>Oceania</td>
<td>5.31</td>
<td>5.31</td>
<td>6.20</td>
<td>11..25</td>
<td>12.12</td>
<td>11.76</td>
<td>12.38</td>
<td>12.07</td>
<td>12.11</td>
<td>12.15</td>
<td>12.14</td>
</tr>
<tr>
<td>Total</td>
<td>14.85</td>
<td>17.22</td>
<td>19.76</td>
<td>25.67</td>
<td>29.71</td>
<td>28.97</td>
<td>30.08</td>
<td>32.31</td>
<td>35.23</td>
<td>37.09</td>
<td>37.04</td>
</tr>
</tbody>
</table>

Source: FiBL/IFOAM/SOEL Surveys 2000-2011
Development of organic agricultural land in the regions 1999-2010
World: Development of organic agricultural land 1999-2010

Source: FiBL, IFOAM and SOEL 2000-2012
### World: Development of organic agricultural land 2007 to 2010 by geographical region

<table>
<thead>
<tr>
<th>Region</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>0.9</td>
<td>0.9</td>
<td>1.0</td>
<td>1.1</td>
</tr>
<tr>
<td>Asia</td>
<td>2.9</td>
<td>3.3</td>
<td>3.6</td>
<td>3.2</td>
</tr>
<tr>
<td>Europe</td>
<td>7.6</td>
<td>8.2</td>
<td>9.3</td>
<td>10.0</td>
</tr>
<tr>
<td>Latin America</td>
<td>6.4</td>
<td>8.1</td>
<td>8.6</td>
<td>8.4</td>
</tr>
<tr>
<td>North America</td>
<td>2.2</td>
<td>2.5</td>
<td>2.7</td>
<td>2.7</td>
</tr>
<tr>
<td>Oceania</td>
<td>12.1</td>
<td>12.1</td>
<td>12.2</td>
<td>12.1</td>
</tr>
</tbody>
</table>

Source: FiBL & IFOAM Surveys 2009-2012
The ten countries with the highest Increase of organic agricultural land 2009-2010 (in hectares)

- France: +167'929.0
- Poland: +154'908.0
- Spain: +125'897.8
- Bolivia: +71'105.1
- Turkey: +57'951.3
- Czech Republic: +49'795.0
- Portugal: +49'594.0
- Sweden: +47'169.0
- Germany: +43'587.0
- Macedonia, FYROM: +33'790.2

Source: FiBL/IFOAM Survey 2012, based on data from governments, the private organic sector and certifiers
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 43 million hectares, constituting an increase of 1.5 million hectares compared with 2009.
- In total, 80 million hectares – agricultural land and other areas – were organic in 2010.
Development of all organic areas in the regions 1999-2010

![Graph showing the development of organic areas in different regions from 1999 to 2010. The graph displays data for Africa, Asia, Europe, Latin America, Northern America, and Oceania.](image)
Wild collection and beekeeping areas

- 42.9 million hectares of wild collection and bee-keeping areas were reported for 2010.
- The wild collection / bee-keeping areas are more or less evenly distributed over four regions: Africa, Asia, Europe 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 2006), and wild collection activities are regulated in organic laws.
Distribution of organic wild collection areas by region 2010

38.1% Europe
31.1% Asia
19.1% Latin America
11.2% Northern America
0.5% Africa

Source: FiBL & IFOAM Survey 2012
Development of organic agricultural land and other organic areas 1999 to 2010

Source: FiBL /IFOAM/SÖL 2000-2011
Organic wild collection: The ten countries with the largest wild collection areas (including bee-keeping) 2010

FiBL-IFOAM Survey 2012, based on data from governments, the private sector and certifiers
Organic producers 2010

- For the current survey, a total of 1.6 million organic producers was reported,
- According to the data obtained, more than three quarters of the producers are located in Africa, Asia, and Latin America.
- The country with the most producers is India, followed by Uganda and Mexico.
- This is an decrease of more than 0.2 million producers compared with 2009, mainly due to a decrease of the organic producers in India.
- It should be noted that not all certifiers reported the number of producers; the number is probably higher than 1.6 million.
- Outlook 2011 data: At BioFach 2012 India announced that there are 1 million organic farmers in the country now – so globally there must be more then 2 million producers at this stage.
The ten countries with the largest numbers of organic producers 2010

- India: 400,551
- Uganda: 188,625
- Mexico (2008): 128,862
- Ethiopia: 123,062
- Tanzania (2008): 85,366
- Peru: 44,827
- Turkey: 43,096
- Italy: 41,807
- Spain: 27,877

Source: FiBL-FOAM Survey 2012, based on data from governments, the organic sector and certifiers.
Organic producers by geographical region 2010 (total: 1.6 million)

- Asia: 29%
- Africa: 34%
- Europe: 18%
- Latin America: 17%
- Northern America: 1%
- Oceania: 1%

Source: FiBL & IFOAM 2012
World: Development of organic producers 2000-2010

Source: FiBL, IFOAM & SOEL 1999-2012
In 2010, the global market for certified organic food and drink was estimated to be 59.1 billion US Dollars or approximately 44.5 billion Euros (average exchange rate 2010, (Sahota 2012, FiBL 2012)).

The turnover with organic products has more than trebled since 1999, when it was estimated to be 15 billion US Dollars. With the economic crisis, however, growth slowed down in 2009 in many countries.

However, in 2010, the organic market grew at higher rates again.

More than ninety percent of the organic product revenues is made in the Northern hemisphere. (Sahota 2012)

In 2010, the by far largest market was the United States with 20.2 billion Euros of organic food sales, followed by Germany with 6 billion and France with 3.4 billion Euros.

In 2010, the countries with the highest market shares for organic food were Denmark (7.2 percent), followed by Austria (6 percent) and Switzerland (5.7 percent).

The highest annual per capita consumption was in Switzerland (153 Euros) and in Denmark (142 Euros). (FiBL 2012).
Global organic market: Distribution of revenues 2010

North America 49%
Europe 47%
Others 4%

Source: Organic Monitor 2012
Distribution of organic food sales by country 2010

- United States of America: 45%
- Germany: 14%
- France: 8%
- United Kingdom: 4%
- Canada: 3%
- Italy: 3%
- Switzerland: 3%
- Others: 19%

Source: FiBL Survey 2012
The countries with the largest domestic markets for organic food 2010 (total 44.5 billion Euros)

Last update: June 22, 2012

United States of America: 20'155 million euros
Germany: 6'020 million euros
France: 3'516 million euros
United Kingdom: 2'000 million euros
Canada: 1'904 million euros
Italy: 1'550 million euros
Switzerland: 1'180 million euros
Japan (2009): 1'000 million euros
Austria: 986 million euros
Spain: 905 million euros

Source: FiBL, based on national sources
Global market

Source: Organic Monitor, various years
Growth of sales with organic food and beverages in Germany 2000-2010

Sources: Hamm/Rippin 2009, AMI 2010-2012
Development of the US Organic market

Turnover in Million US dollars

Source: Organic Trade Association Industry Survey
Market growth 2009-2010 compared in selected countries

Growth in percent

-15%  -10%  -5%  0%  5%  10%  15%  20%  25%

2009  2010

Austria  Belgium  Denmark  Finland  France  Germany  Italy  Netherlands  Sweden  Switzerland  UK  US

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Organic Farming Movement
The countries with the highest per capita consumption 2010

Per capita consumption in Euros 2010

Source: Compiled by FiBL in cooperation with AMI and ORC 2011, based on national sources
The countries with the highest shares of organic food sales 2010

- Denmark: 7.20%
- Austria (2009): 6.00%
- Switzerland: 5.70%
- Sweden: 4.10%
- United States of America: 4.00%
- Germany: 3.50%
- Luxembourg (2006): 3.30%
- Netherlands: 2.70%
- Canada: 2.50%
- France: 2.00%

Source: Compiled by FiBL in cooperation with AMI and ORC 2011, based on national sources
Organic farming in developing & transition countries 2010

› About one third of the world’s organic agricultural land – 12.5 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.

› 1.3 million producers are in these countries.

Developing and transition countries: The ten countries with the largest areas of organic agricultural land 2010

- Argentina: 4,177,653 hectares
- Brazil: 1,765,793 hectares
- China: 1,390,000 hectares
- Uruguay: 930,965 hectares
- India: 780,000 hectares
- Turkey: 383,782 hectares
- Mexico: 332,485 hectares
- Ukraine: 270,226 hectares
- Uganda: 228,419 hectares
- Peru: 216,756 hectares

FiBL/IFOAM Survey 2012, based on data from governments, the private organic sector and certifiers. *= 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 and transition countries*: Distribution of organic producers and agricultural land in 2010

FiBL/IFOAM Survey 2012, based on data from governments, the private organic sector and certifiers

* = 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 and transition countries: The ten countries with the largest highest shares of organic agricultural land 2010

- Dominican Republic: 8.5%
- Samoa: 7.9%
- Sao Tome and Principe: 7.9%
- Brazil: 6.9%
- Timor-Leste: 6.6%
- Mauritius: 6.5%
- Uruguay: 6.3%
- Niue: 3.2%
- Argentina: 3.0%
- Mexico: 2.4%

FiBL/IFOAM Survey 2012, based on data from governments, the private organic sector and certifiers.*

* = countries on the DAC list, see http://www.oecd.org/document/45/0,3746,en_2649_34447_2093101_1_1_1_1,00.html