

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

Data as published February 2012 in *The World of Organic Agriculture. Statistics and Emerging Trends 2012*
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



Schweizerische Eidgenossenschaft
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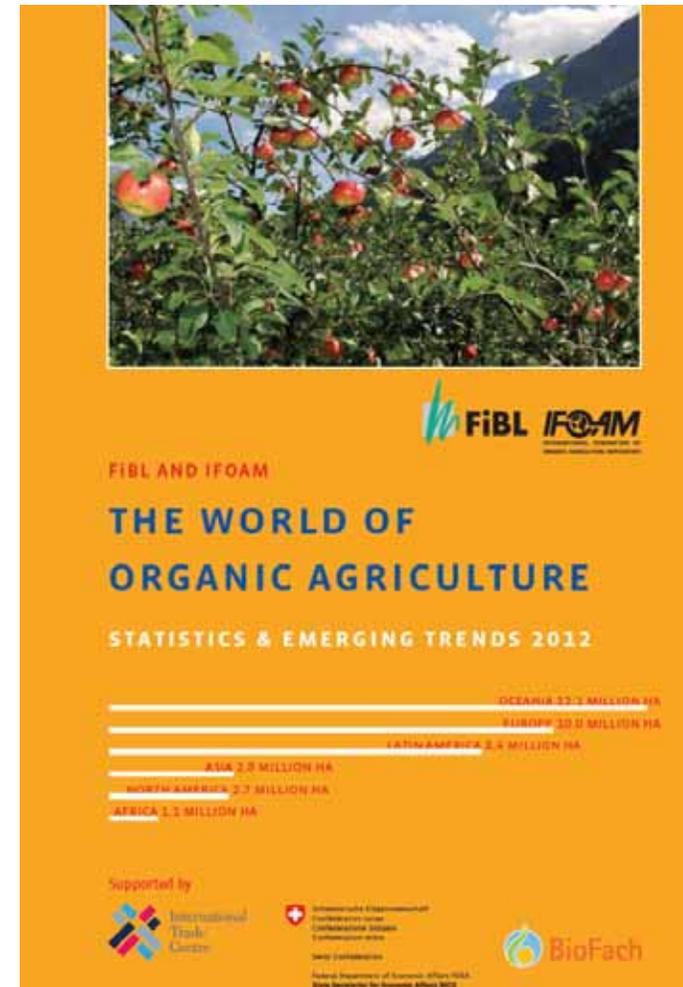
Swiss Confederation

Federal Department of Economic Affairs FDEA
State Secretariat for Economic Affairs SECO



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.
 - › *Willer, H, and Kilcher, L. (2012) The World of Organic Agriculture. Statistics and Emerging Trends 2012. FiBL, Frick, and, IFOAM, Bonn



Website www.organic-world.net

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

The screenshot shows the homepage of the Organic World website. At the top, the title "Organic World" is displayed in green, with the subtitle "Global organic farming statistics and news" below it. The FIBL logo is in the top right corner. A green navigation bar contains links for Home / News, About, Statistics, Yearbook (highlighted), Country info, Password area, and Contact / Site info. Below the navigation bar, a breadcrumb trail reads "Home » Yearbook » 2012 edition".

The main content area is divided into three columns. The left column features a list of links for the 2012 edition: Contents, Key results and tables, PDF, Presentations, Graphs & maps, Order book, Press release, Password area, and Corrigenda. Below this is a search box with a "Search" button. The middle column is titled "The World of Organic Agriculture 2012" and includes a "Contents at a glance" section. It contains two paragraphs of text: the first describes the book's focus on recent developments in global organic agriculture, and the second details the comprehensive statistics and information provided, including land use, market data, and emerging trends. Below the text is a list of country reports. The right column features a book cover for "The World of Organic Agriculture 2012" and a list of links: "Table of contents - Key results and tables - Graphs & maps - Presentations - Press release - Order book - Password area - Clarifications and corrigenda".

At the bottom of the page, there are logos for FIBL, the International Trade Centre (ITC), and the Swiss State Secretariat for Economic Affairs (SECO), along with text indicating their support for the website.

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);
- › The results are published in the yearbook 'The World of Organic Agriculture 2012' and at www.organic-world.net.

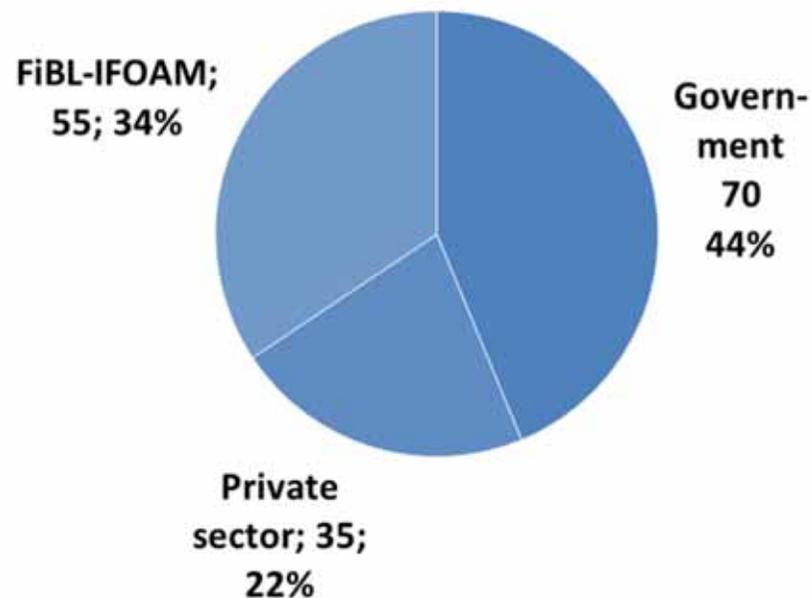
Countries and territories covered by the global survey on organic agriculture 2010

Table 1: Countries and territories covered by the global survey on organic agriculture 2010

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

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

International certifiers that provided data for several countries (2010 data)



CONTROL UNION CERTIFICATIONS



Soil Association

Networks, transnational data collection efforts



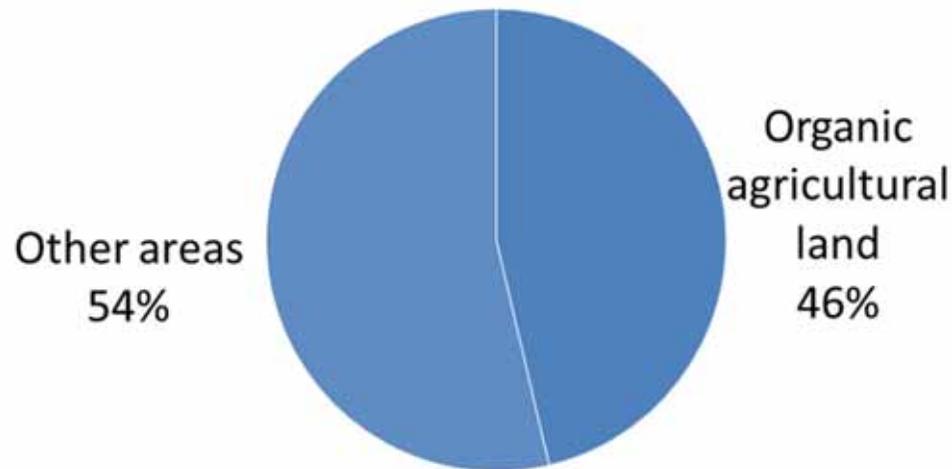
General notes on the data

- › Data sources: For data sources see annex of The World of Organic Agriculture 2012 or www.organic-world.net/statistics-data-sources.html
- › 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](http://www.organic-world.net/statistics-data-revisions.html) 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 (-01. 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

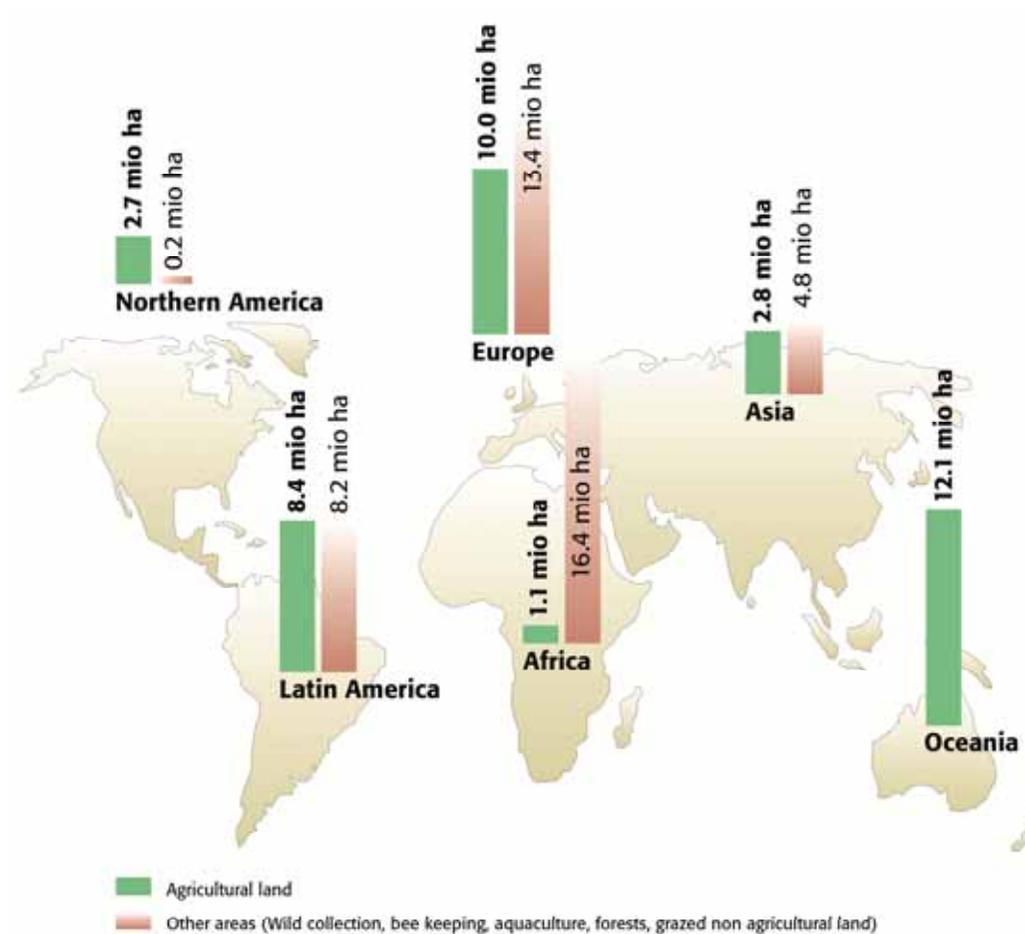


- › Agricultural land (37 million hectares in 2010)
 - › Cropland
 - › **Arable land** (cereals, vegetables etc.)
 - › **Permanent crops** (fruit, grapes, olives ...)
 - › **Cropland, no details** (=arable land and permanent crops with no further details)
 - › Permanent grassland
 - › Other agricultural land
- › Non-agricultural areas (43 million hectares in 2010)
 - › Wild collection/Bee keeping
 - › Forest
 - › Aquaculture
 - › Grazing areas on non-agricultural land

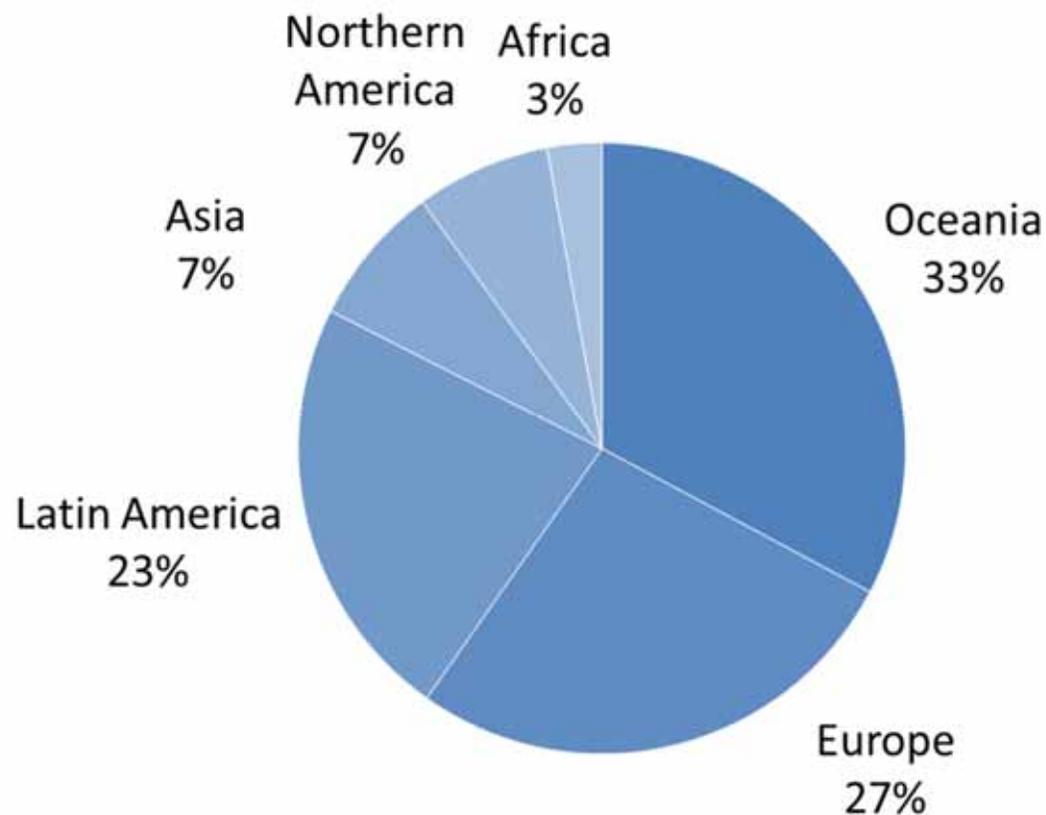
Organic agricultural land by region 2010

- › 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.

Organic agricultural land and other organic areas 2010



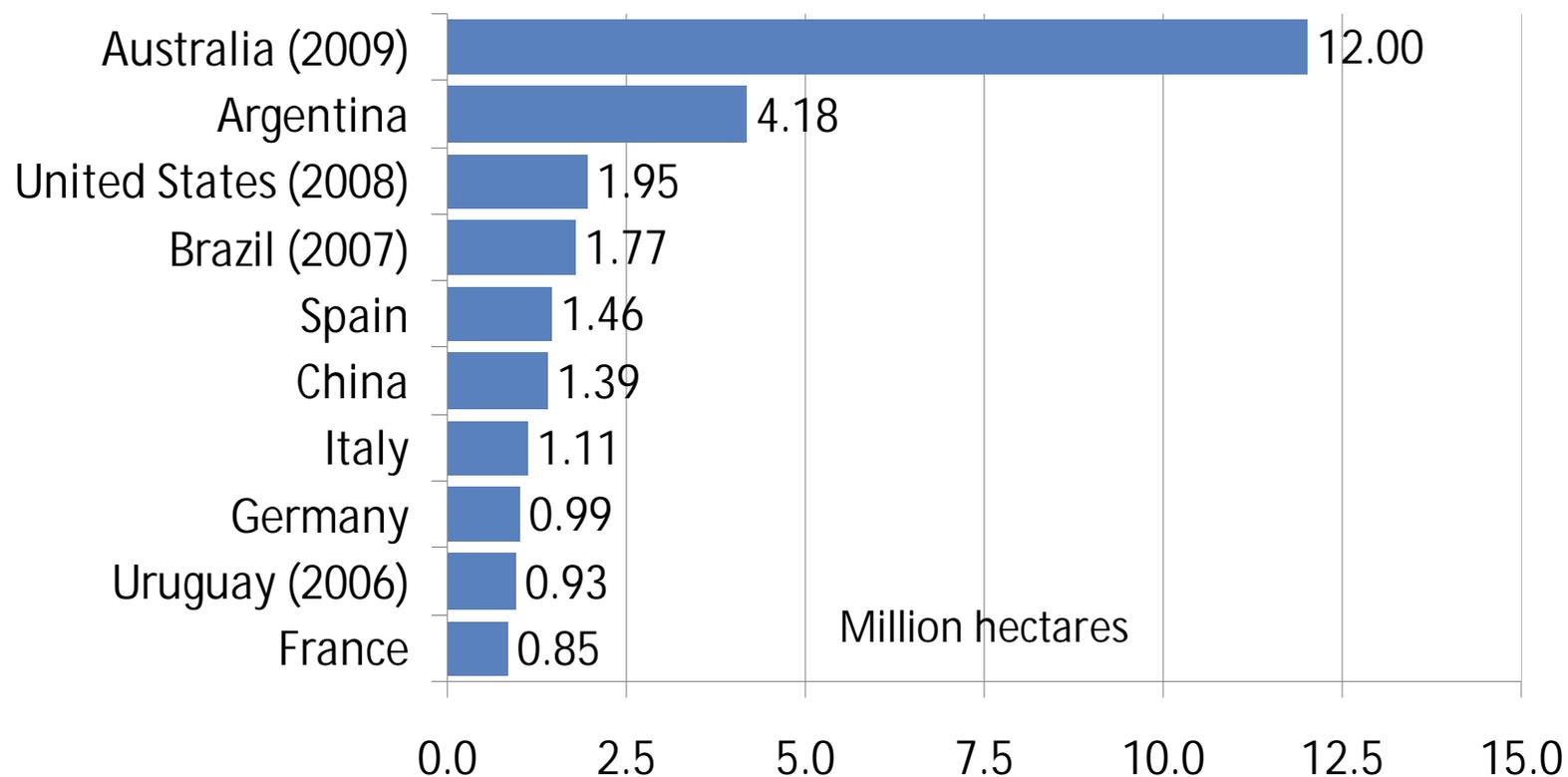
Distribution of organic agricultural land by region 2010



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



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

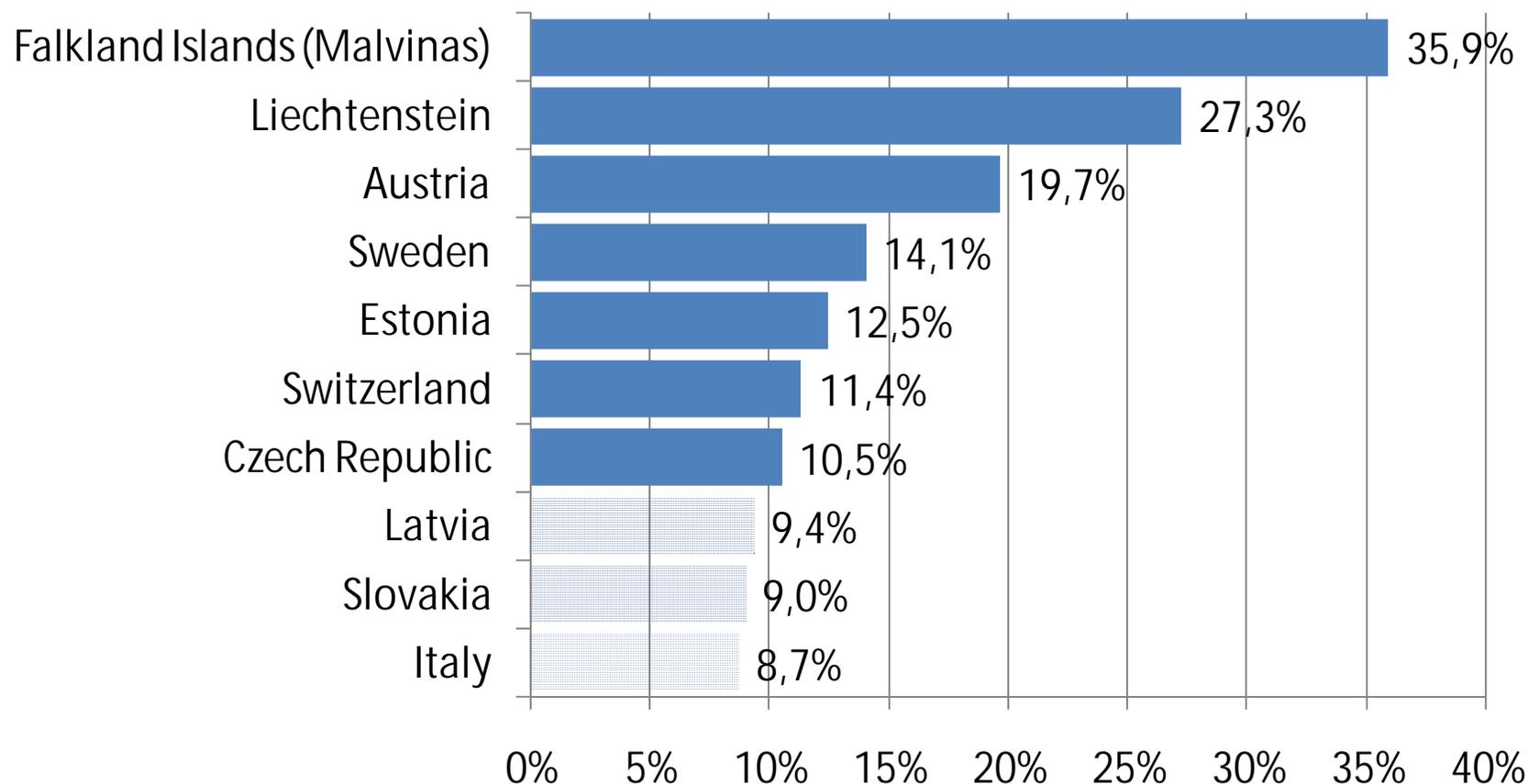
Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2010

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

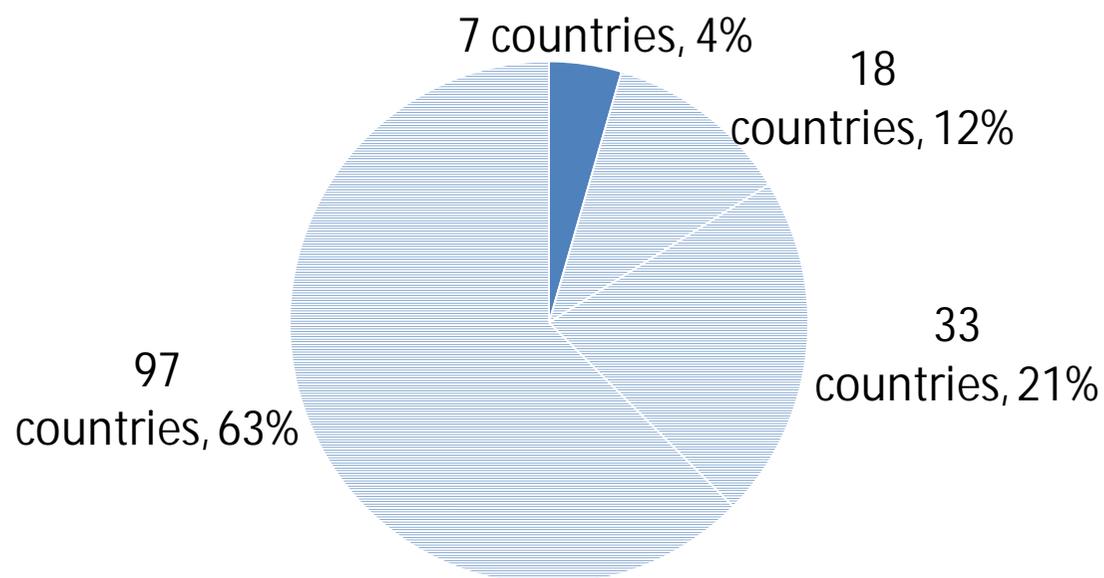
Source: FIBL-IFOAM Survey 2012.

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



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

Growth of the organic agricultural land 2010

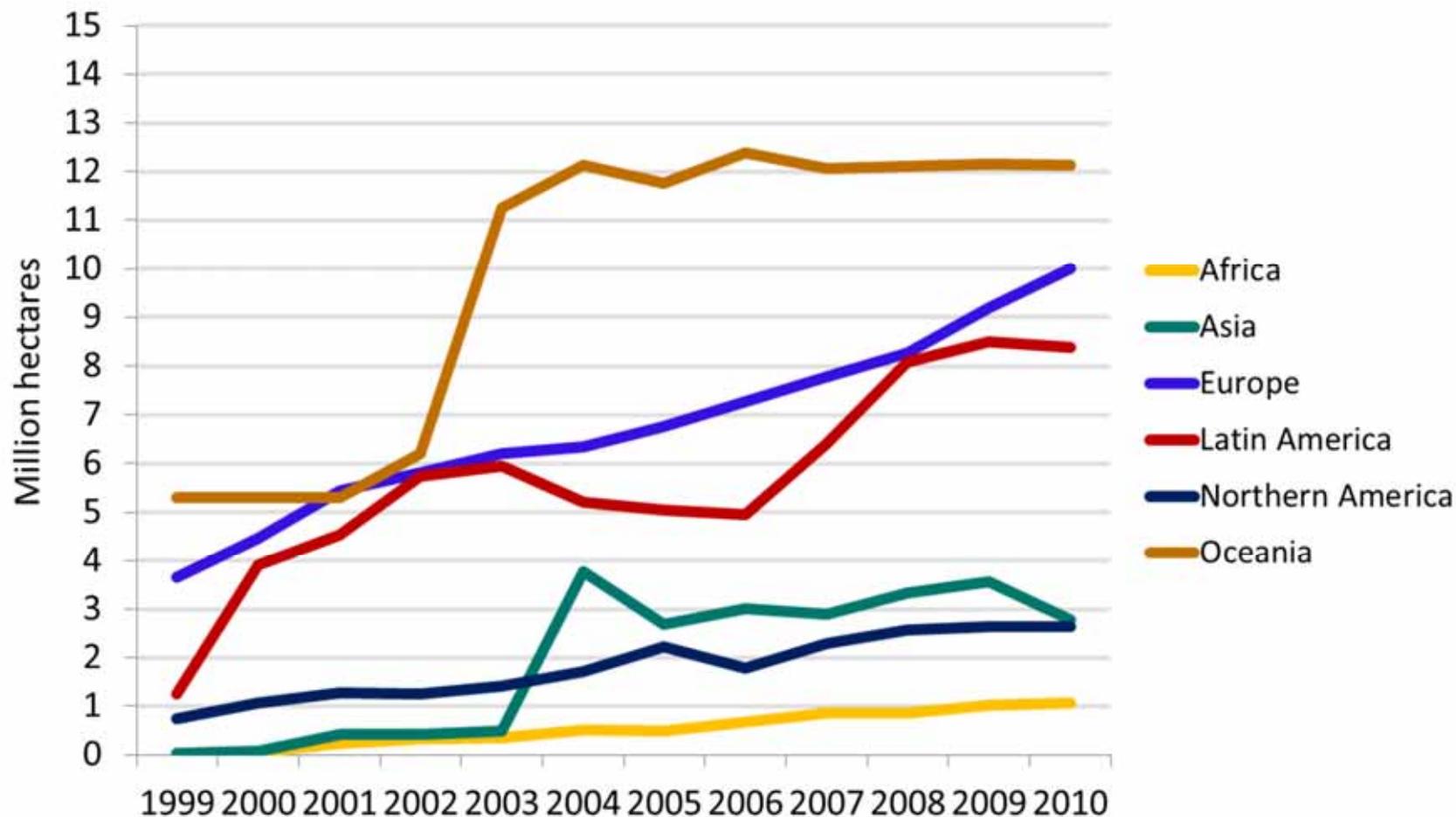
- › Compared with the revised data from 2009, the organic agricultural land has decreased by 50 thousand hectares, or by 0.1 percent in 2010.
- › Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has more than trebled.

Growth of the organic agricultural land 2000-2010 by region

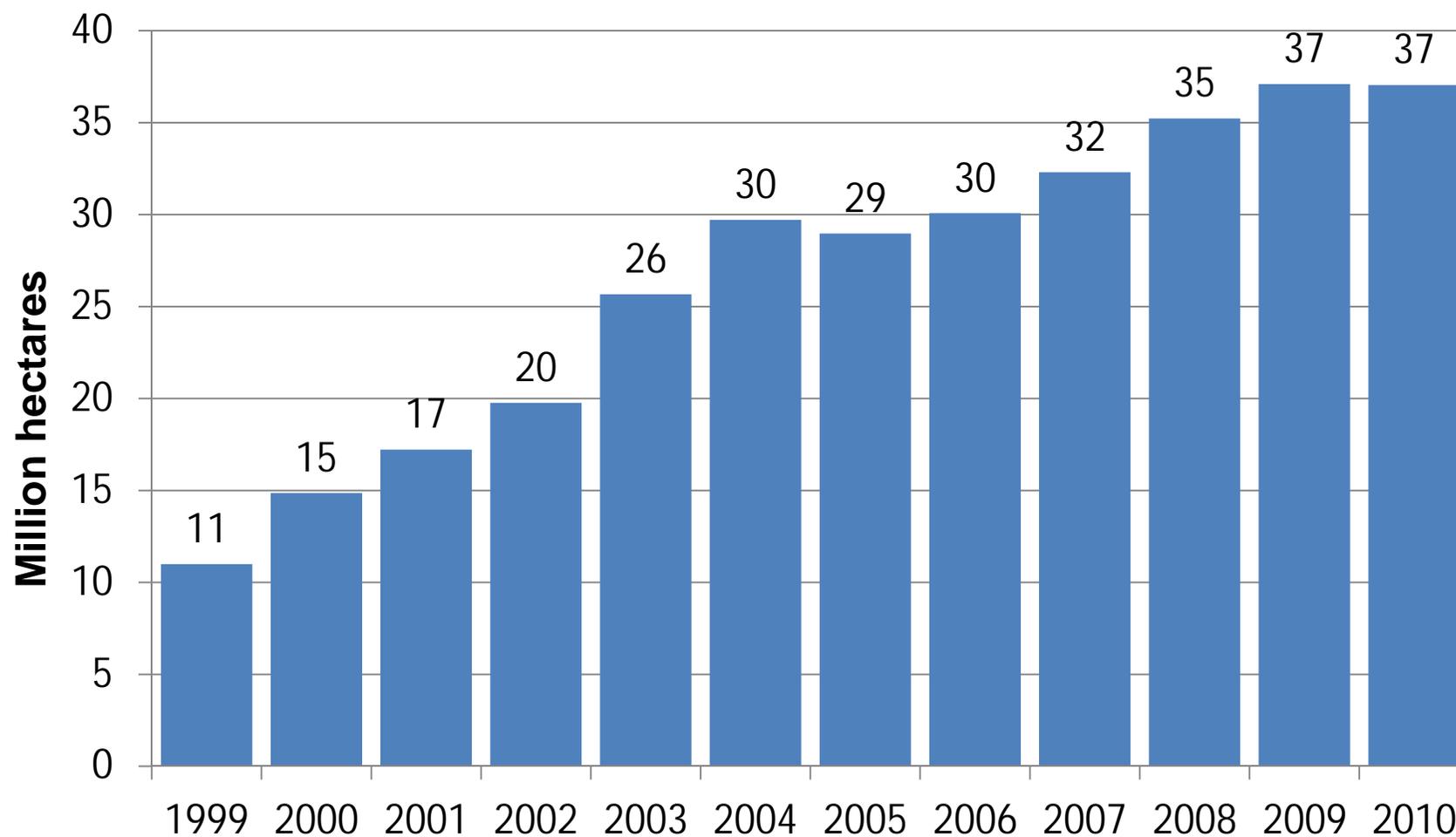
Table: Growth of the organic agricultural land by region 2000-2010 in million hectares

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

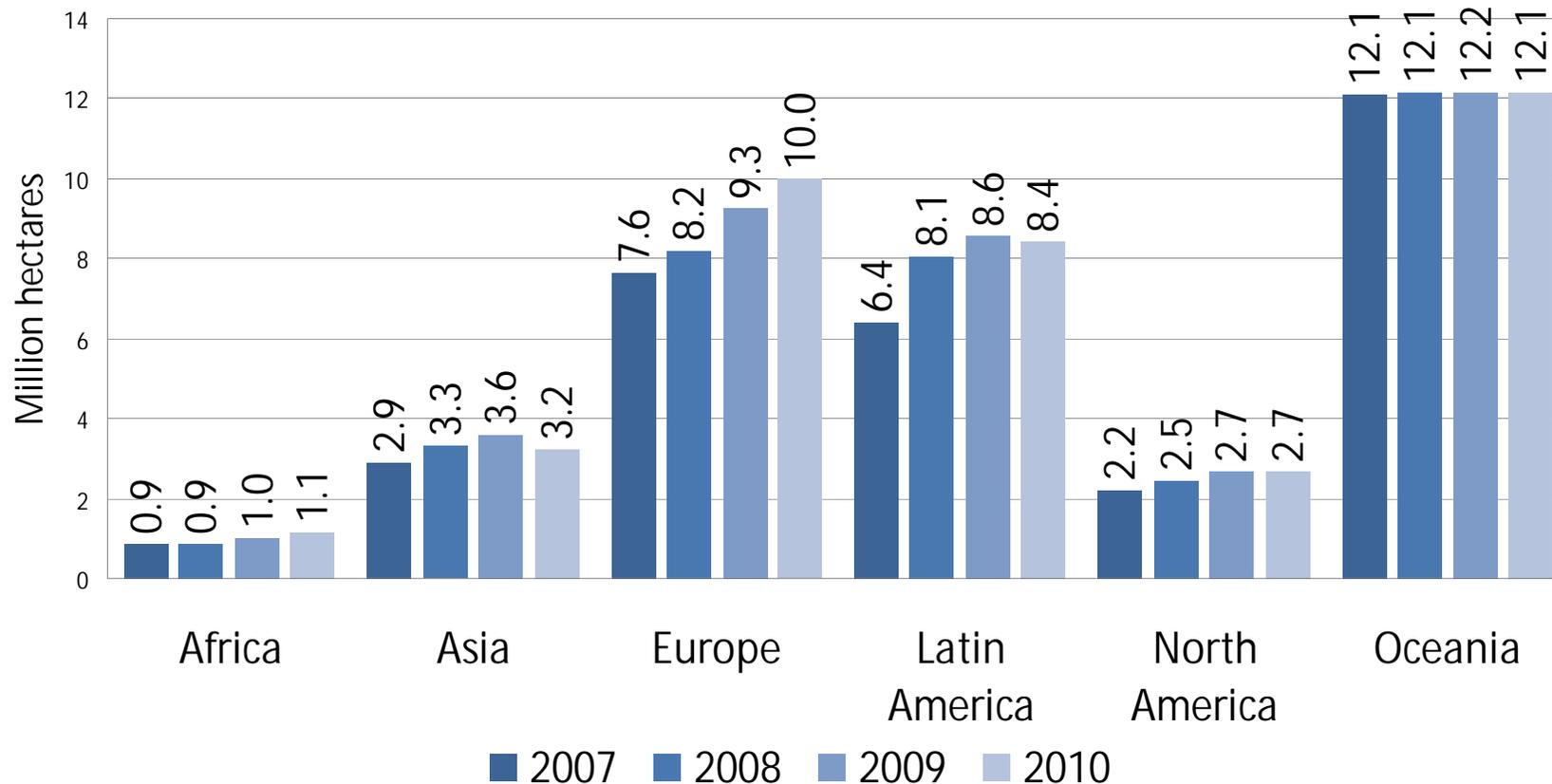
Development of organic agricultural land in the regions 1999-2010



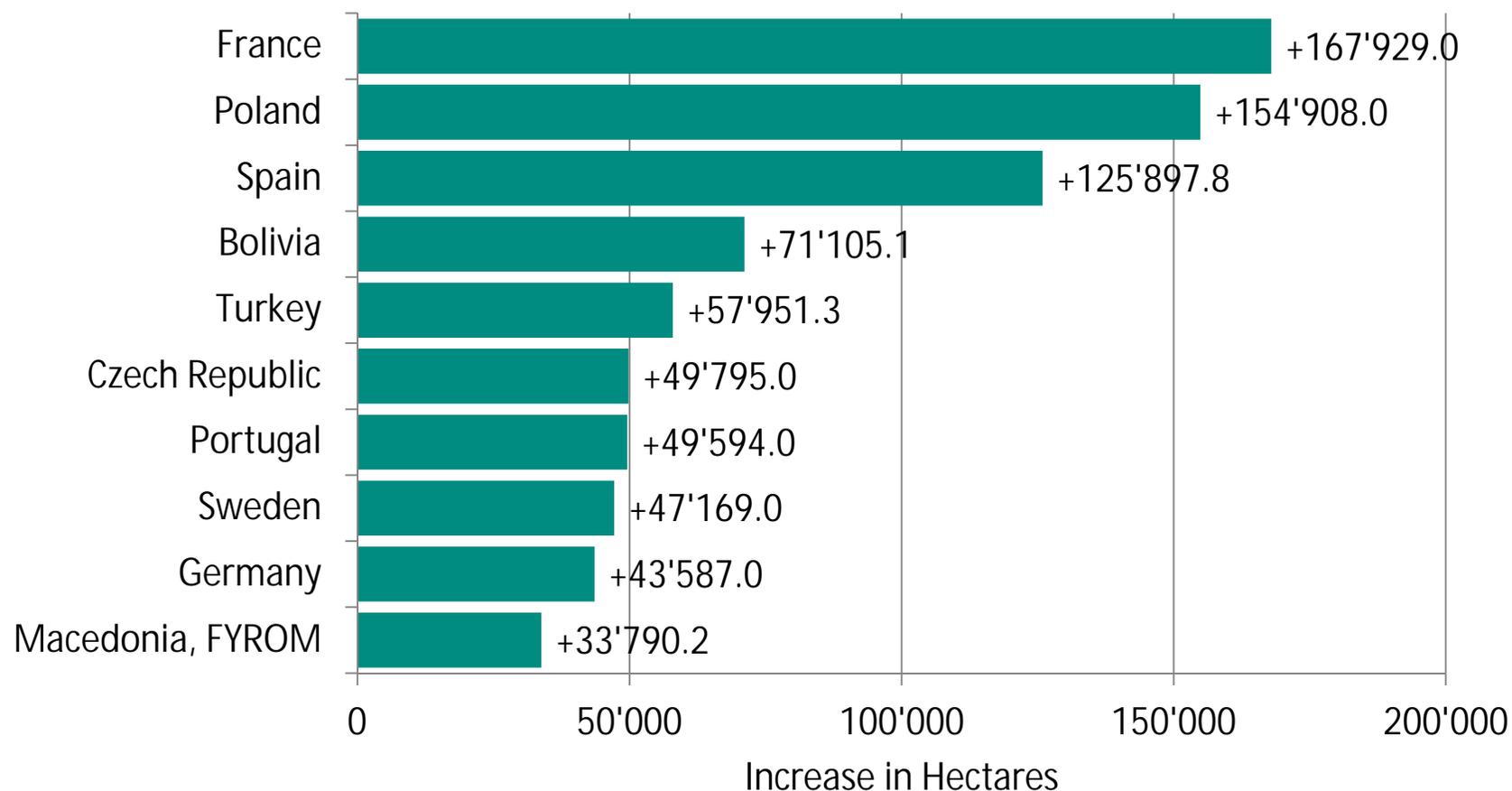
World: Development of organic agricultural land 1999-2010



World: Development of organic agricultural land 2007 to 2010 by geographical region



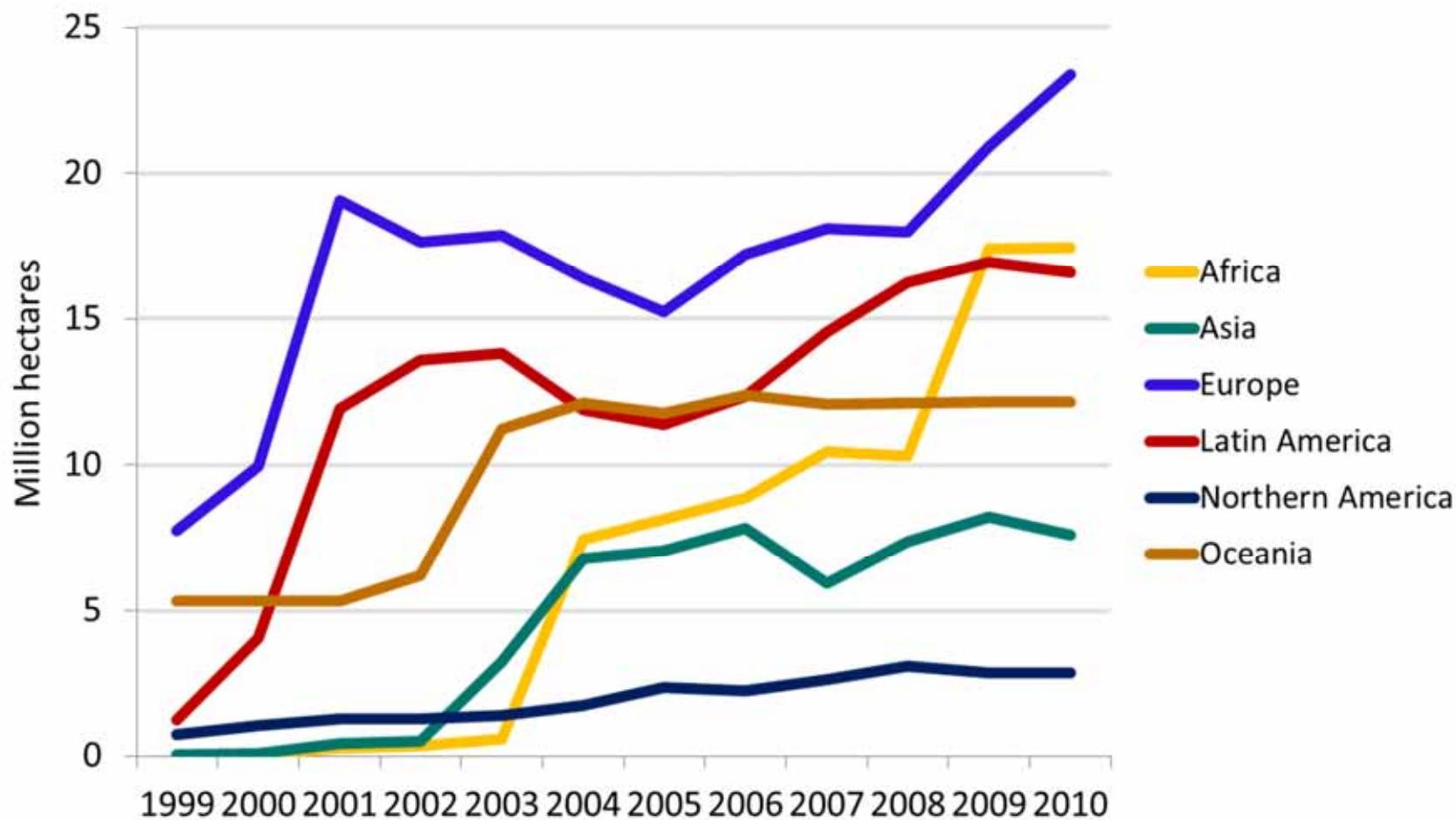
The ten countries with the highest INCREASE of organic agricultural land 2009-2010 (inhectares)



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.

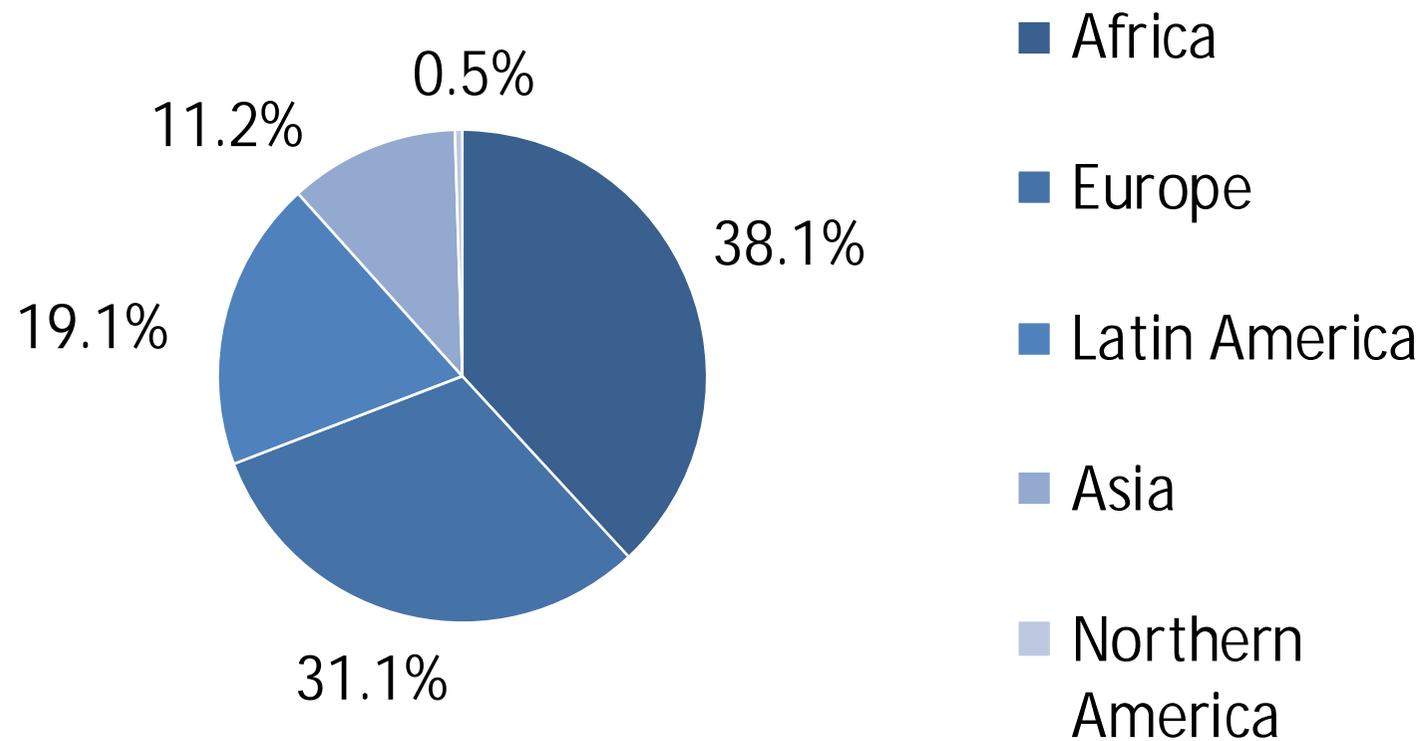
Development of all organic areas in the regions 1999-2010



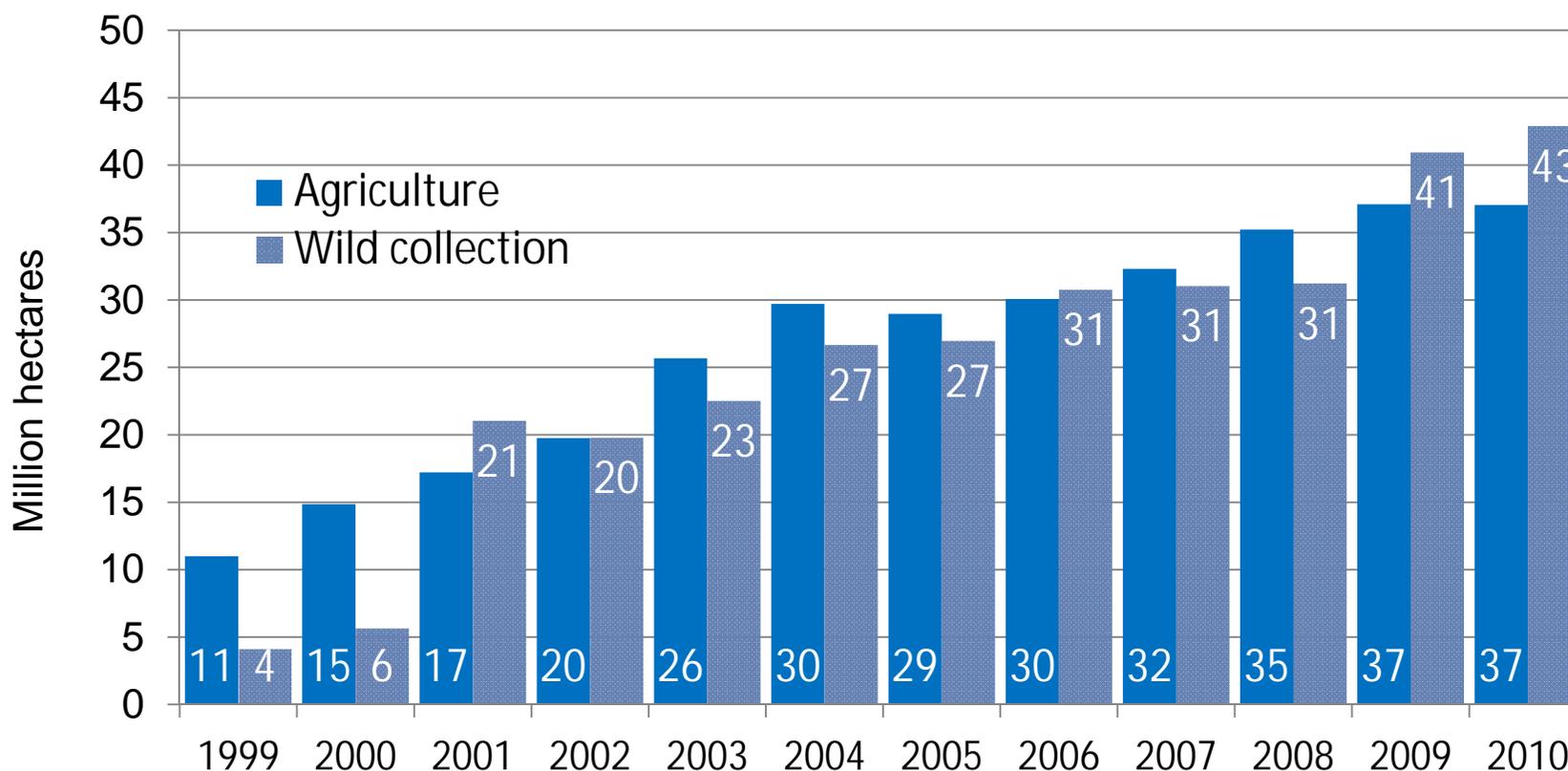
Wild collection and beekeeping areas

- › 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.

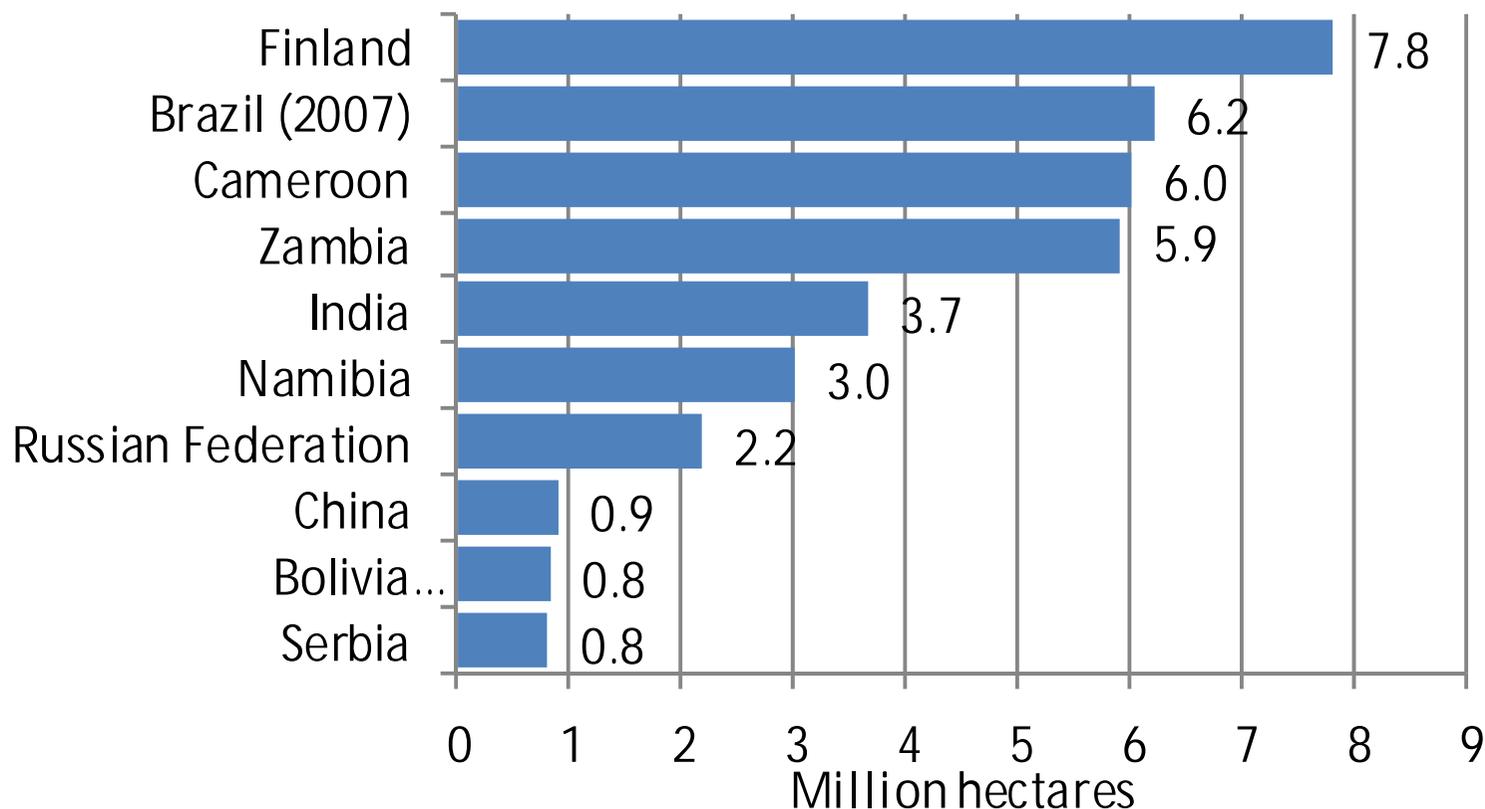
Distribution of organic wild collection areas by region 2010



Development of organic agricultural land and other organic areas 1999 to 2010



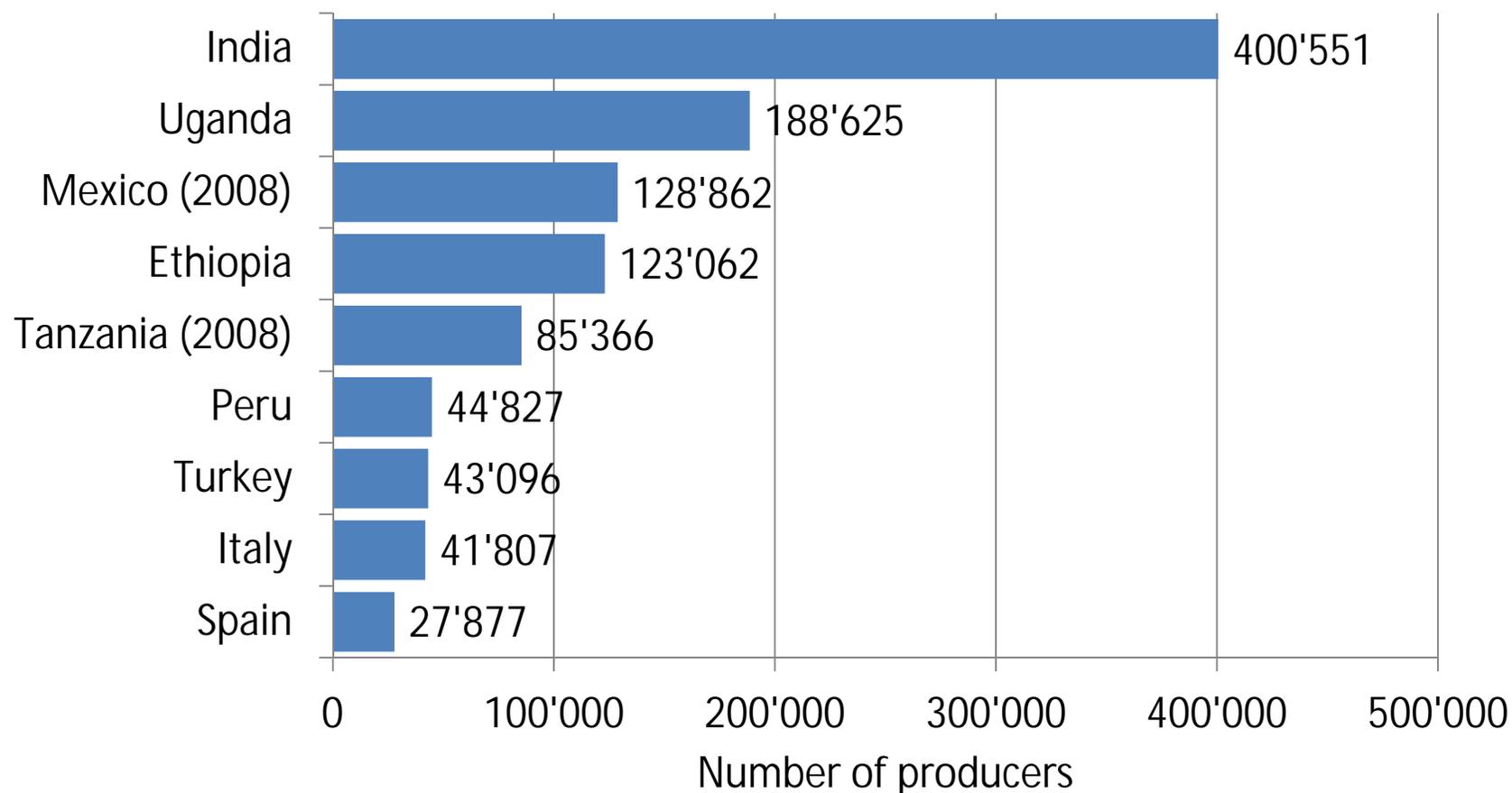
Organic wild collection: The ten countries with the largest wild collection areas (including bee-keeping) 2010



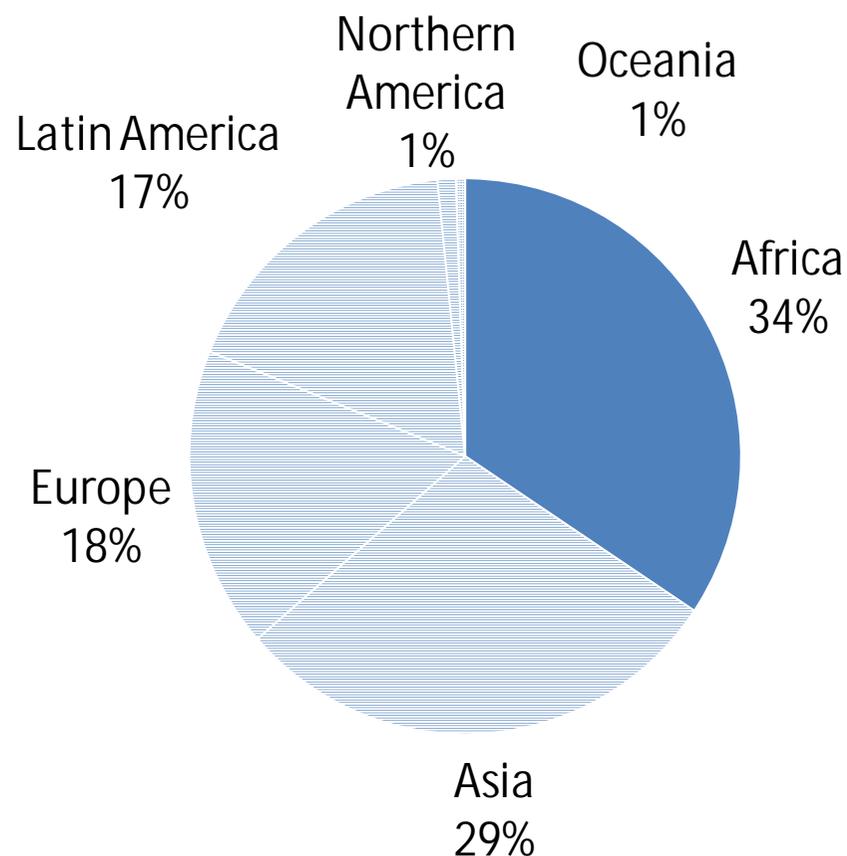
Organic producers 2010

- › 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.

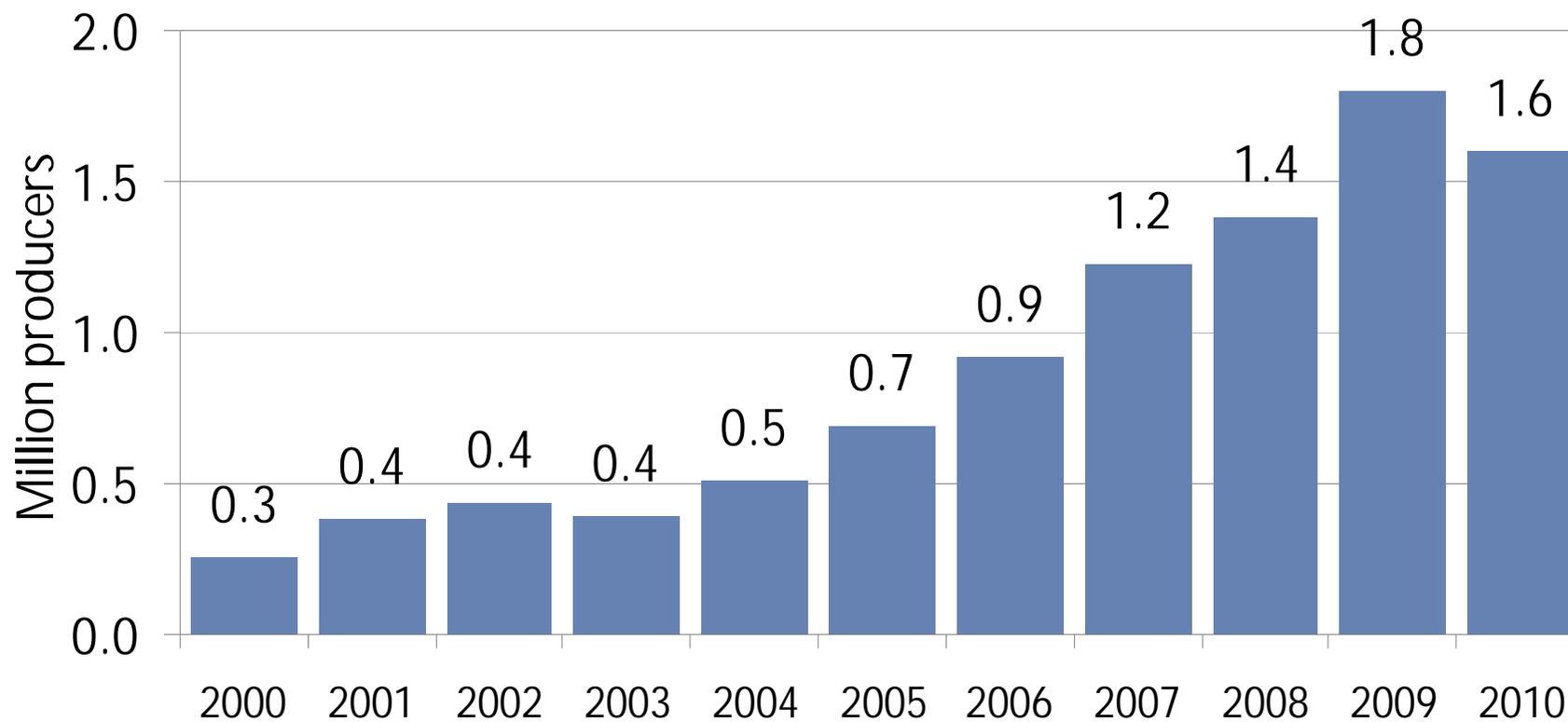
The ten countries with the largest numbers of organic producers 2010



Organic producers by geographical region 2010 (total: 1.6 million)



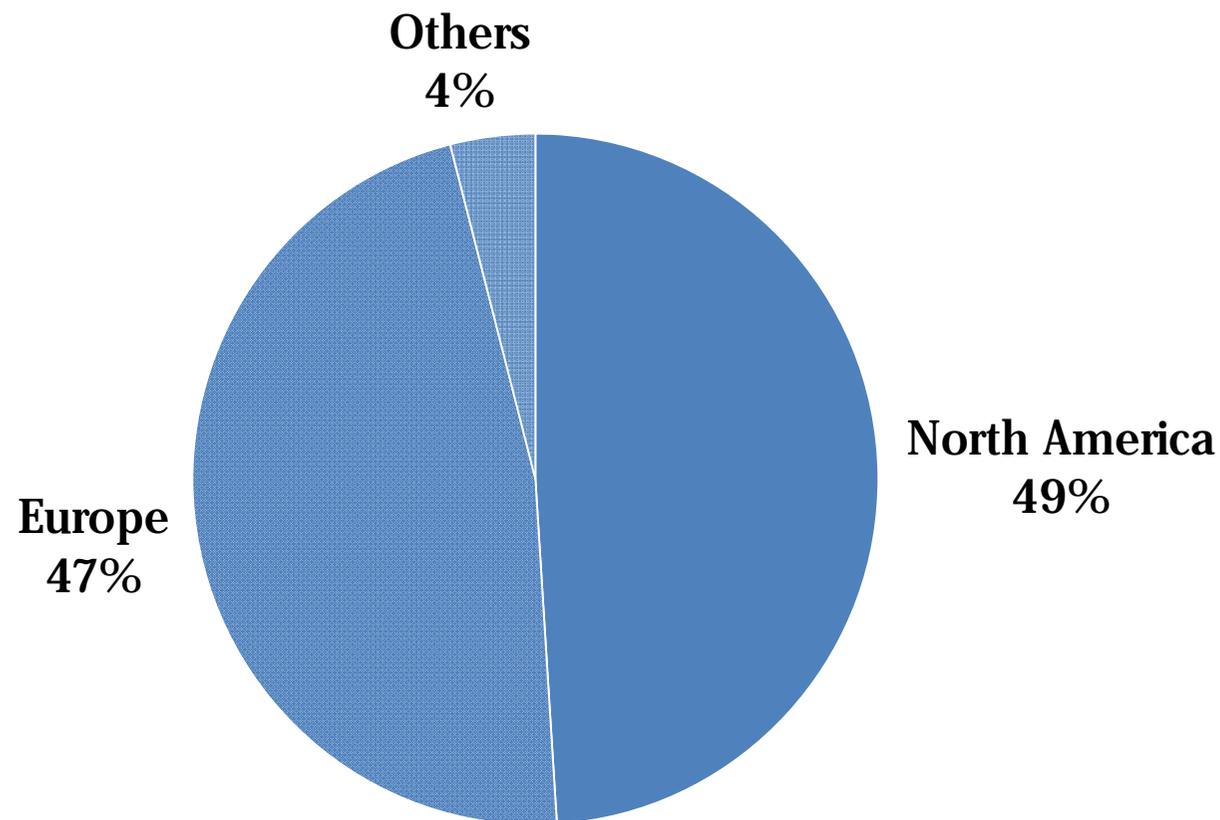
World: Development of organic producers 2000-2010



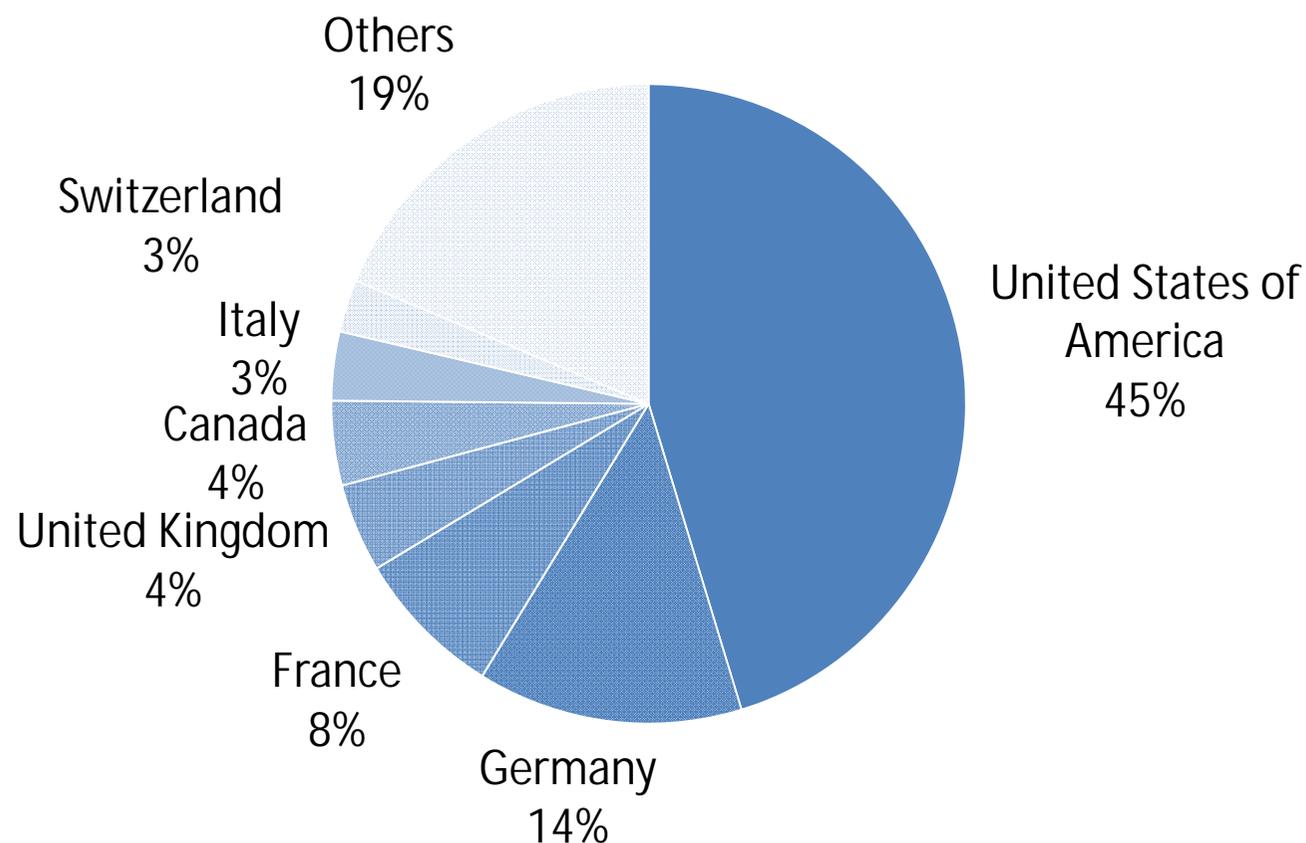
The global market for organic food and beverages 2010

- › 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

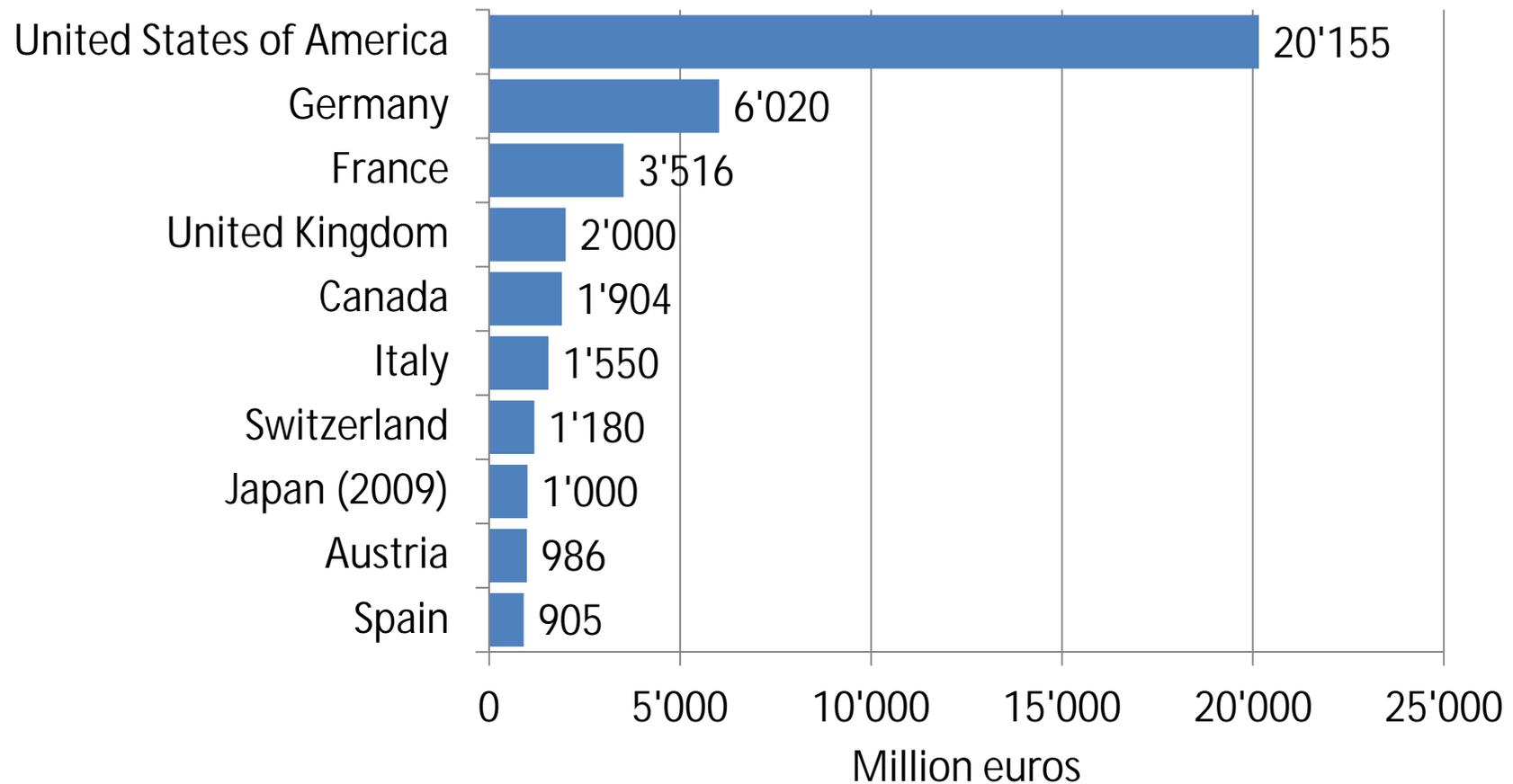


Distribution of organic food sales by country 2010

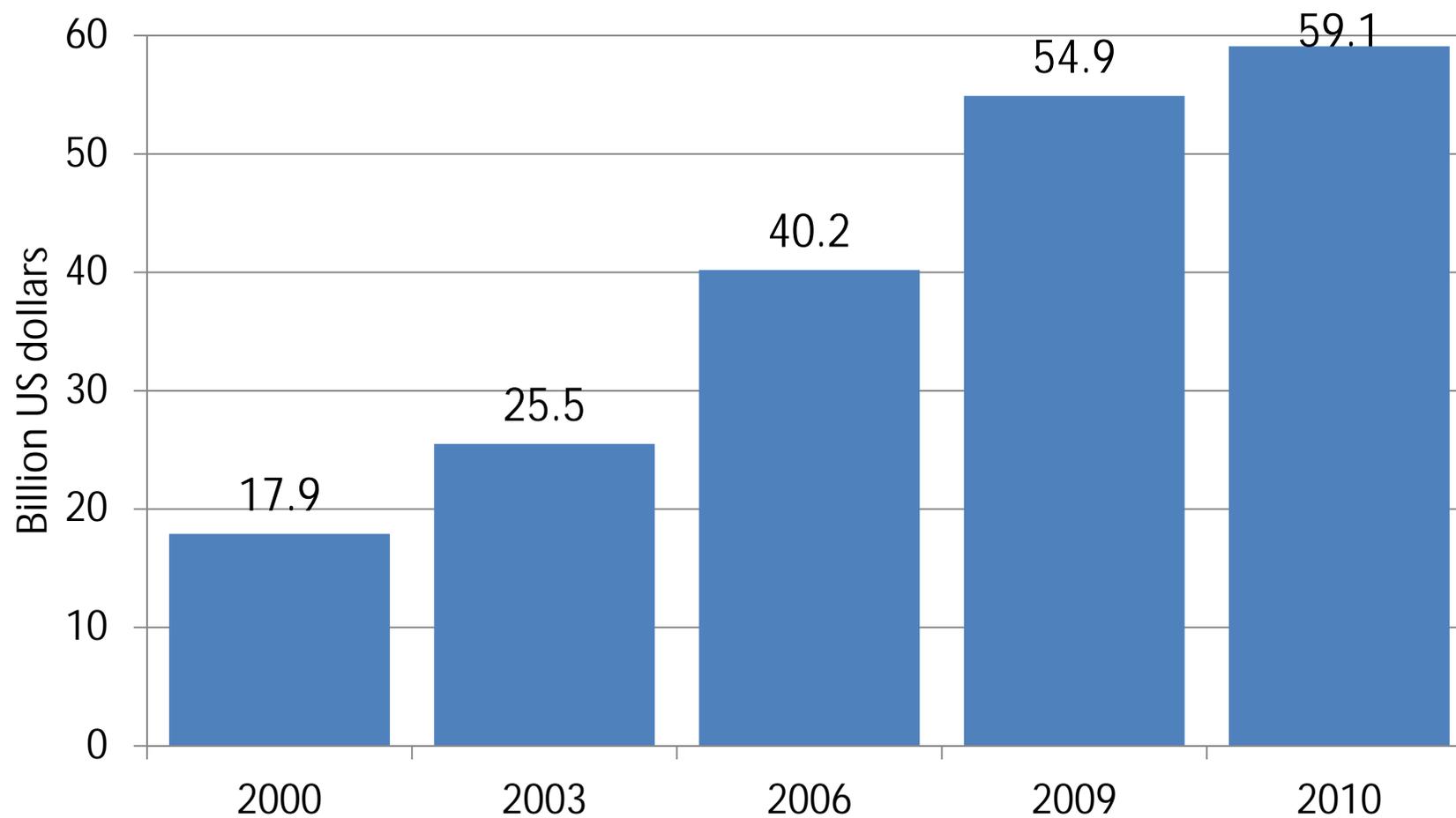


The countries with the largest domestic markets for organic food 2010 (total 44.5 billion Euros)

Last update: June 22, 2012

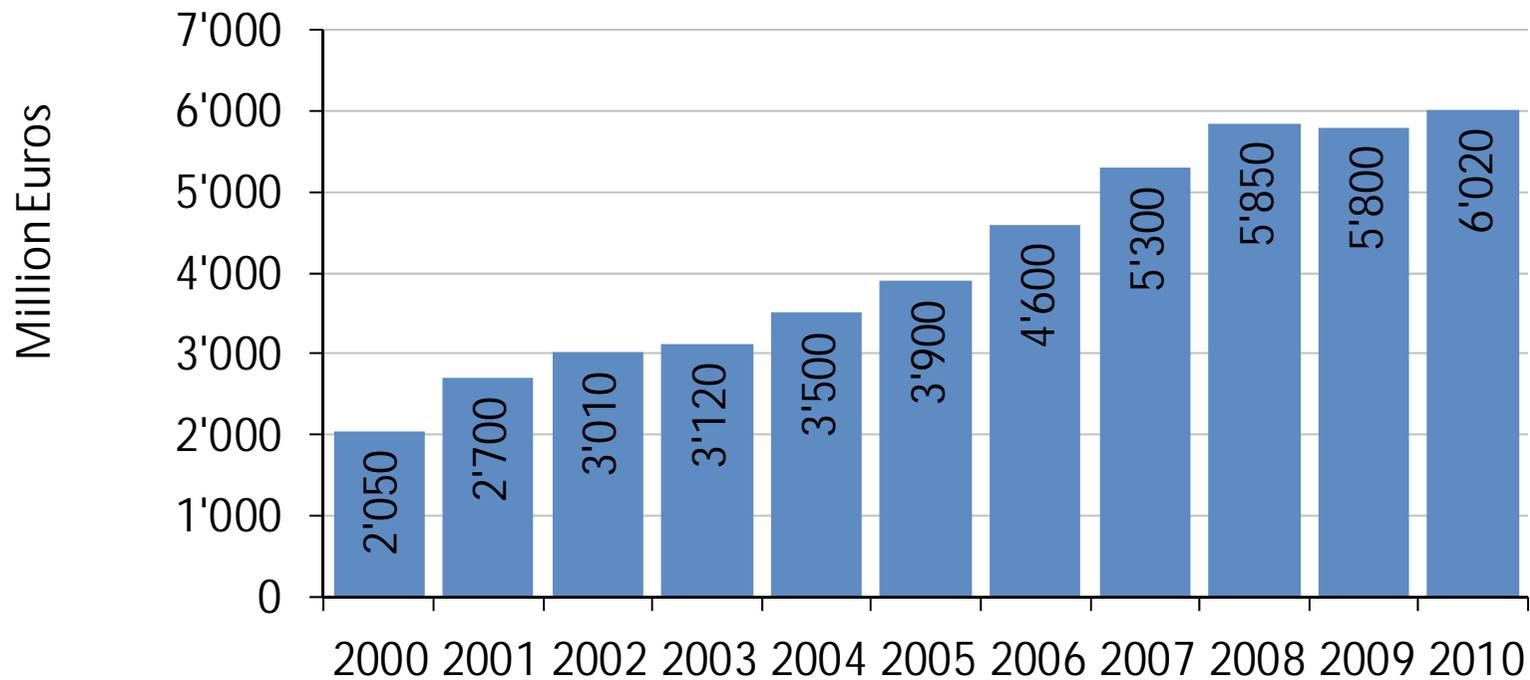


Gobal market



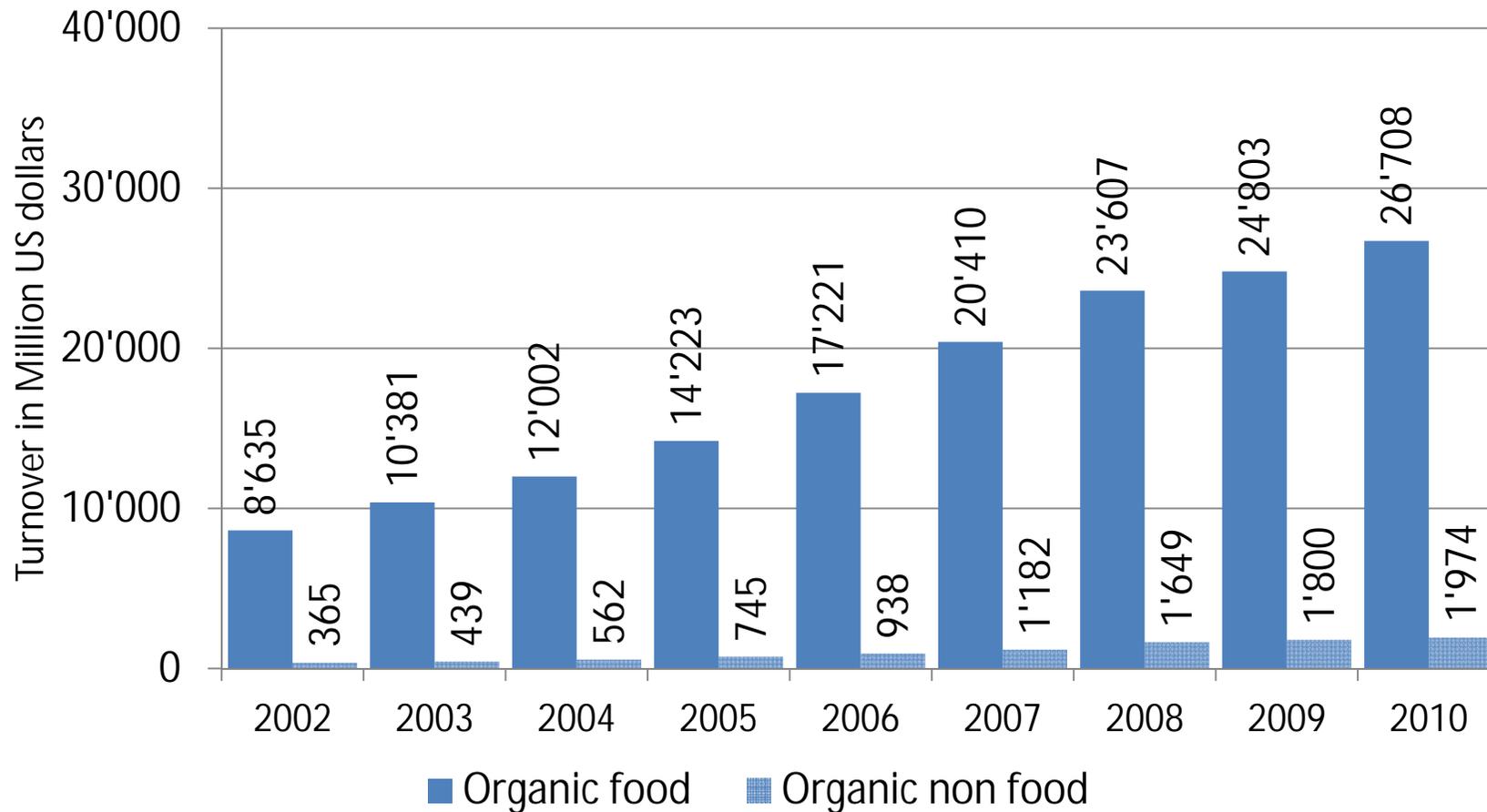
Source: Organic Monitor, various years

Growth of sales with organic food and beverages in Germany 2000-2010

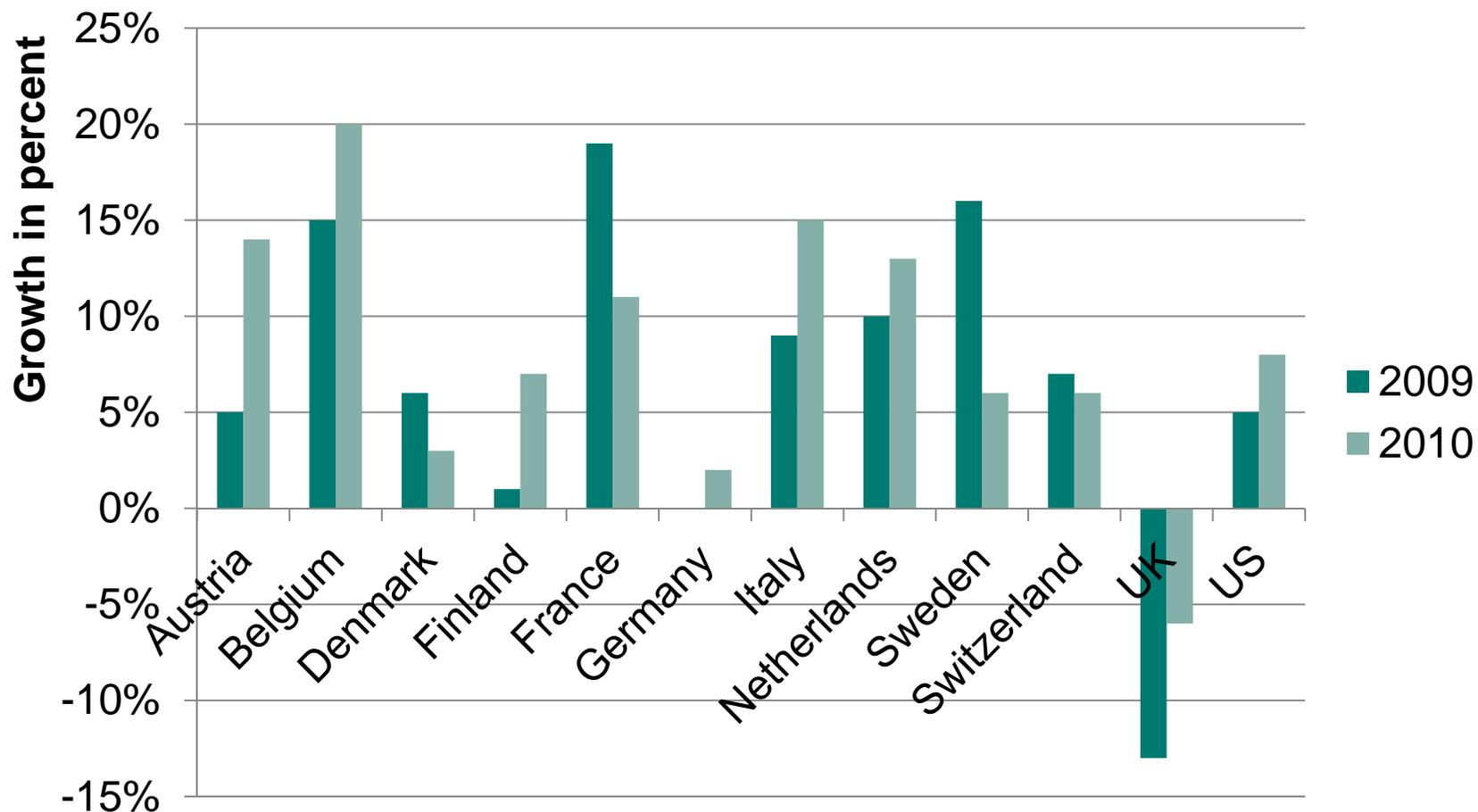


Sources: Hamm/Rippin 2009, AMI 2010-2012

Development of the US Organic market

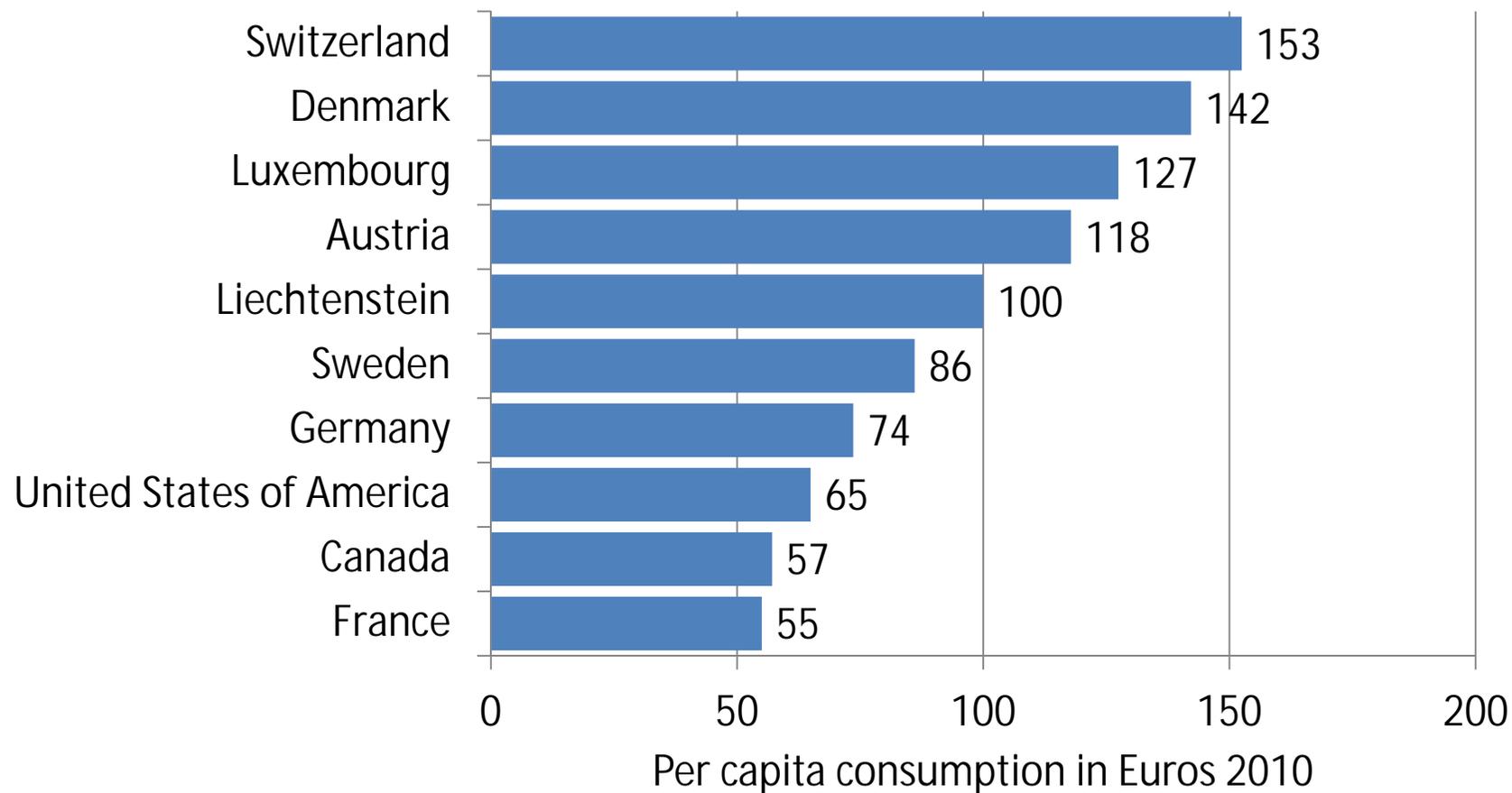


Market growth 2009-2010 compared in selected countries

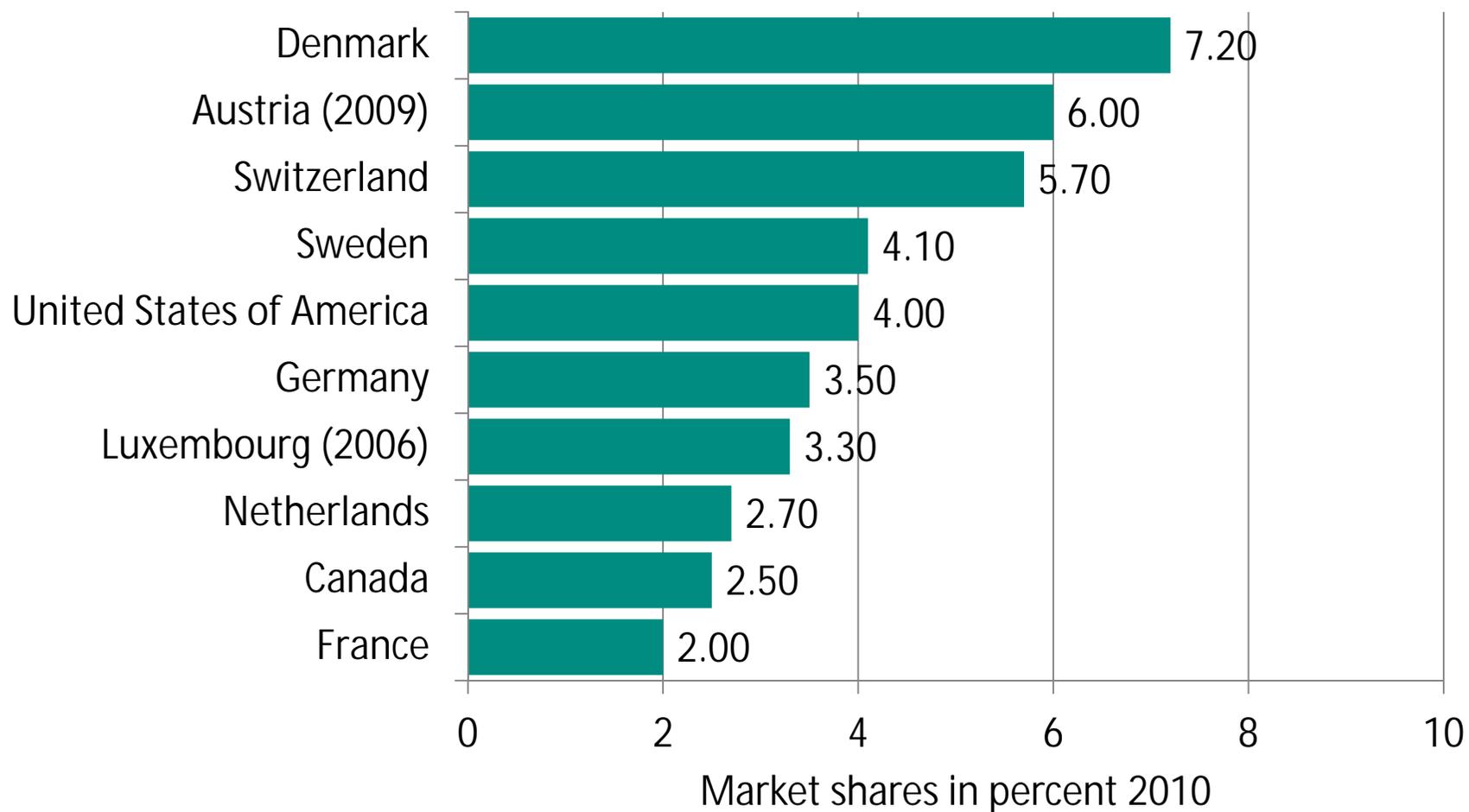


The countries with the highest per capita consumption 2010

Last update: June 22, 2012



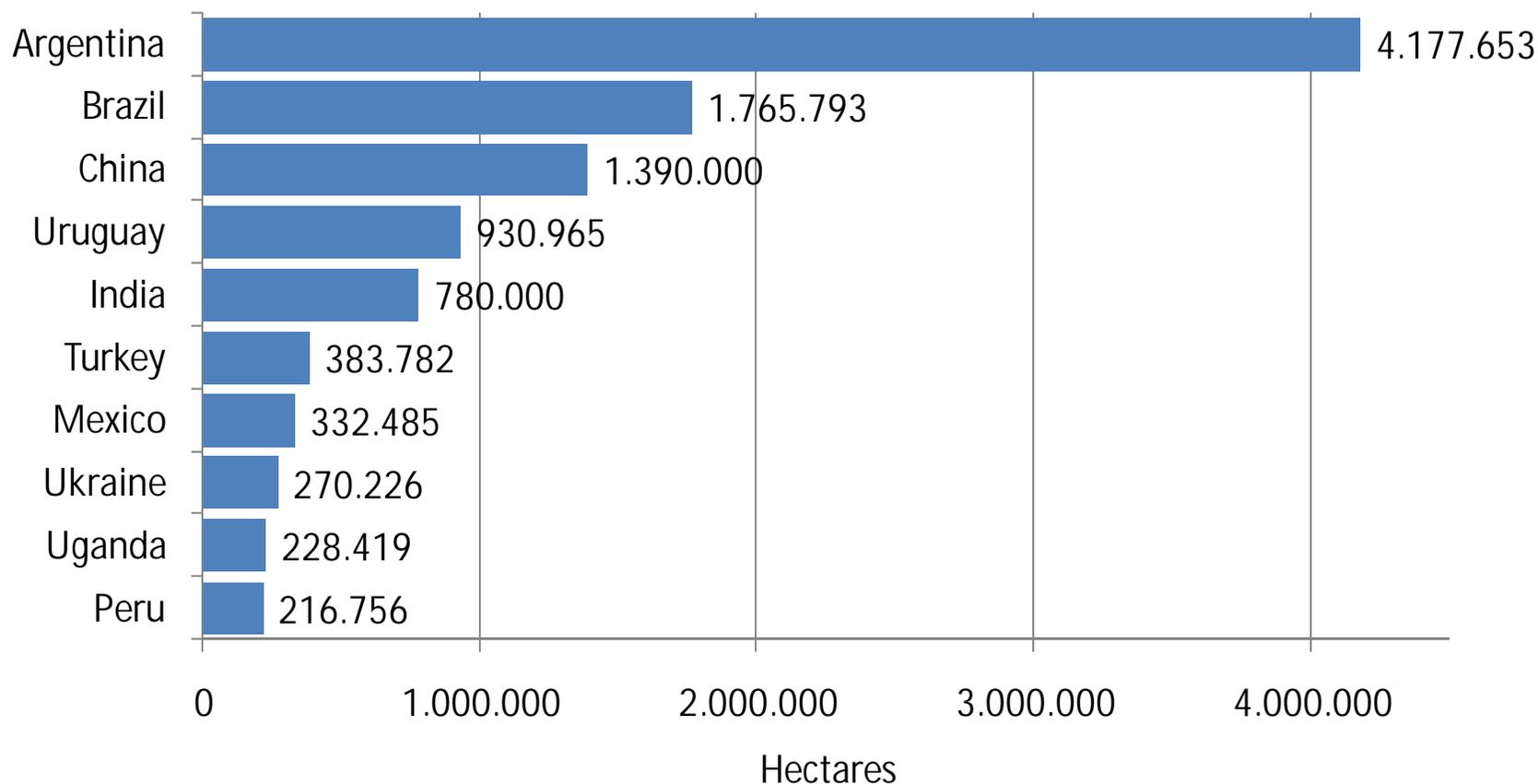
The countries with the highest shares of organic food sales 2010



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.
- › *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 www.oecd.org/dataoecd/23/34/37954893.pdf.

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

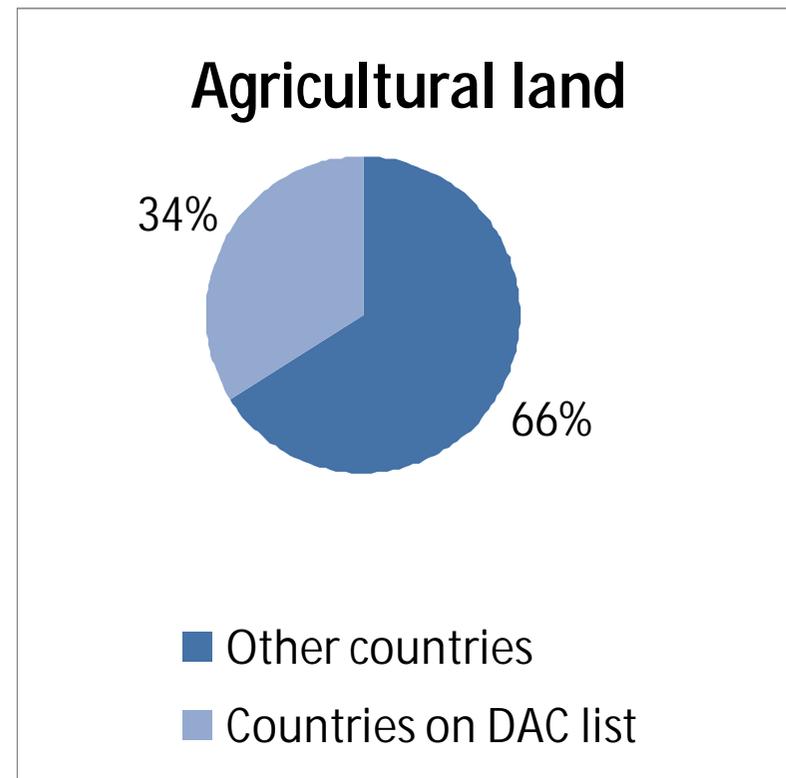
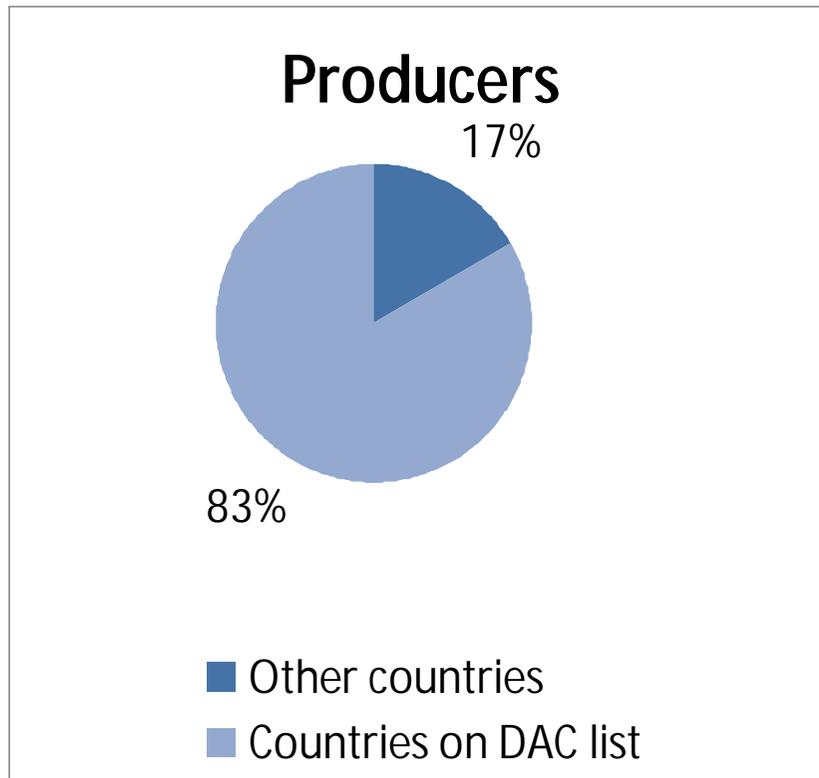


FiBL/IFOAM Survey 2012, based on data from governments, the private organic sector and certifiers

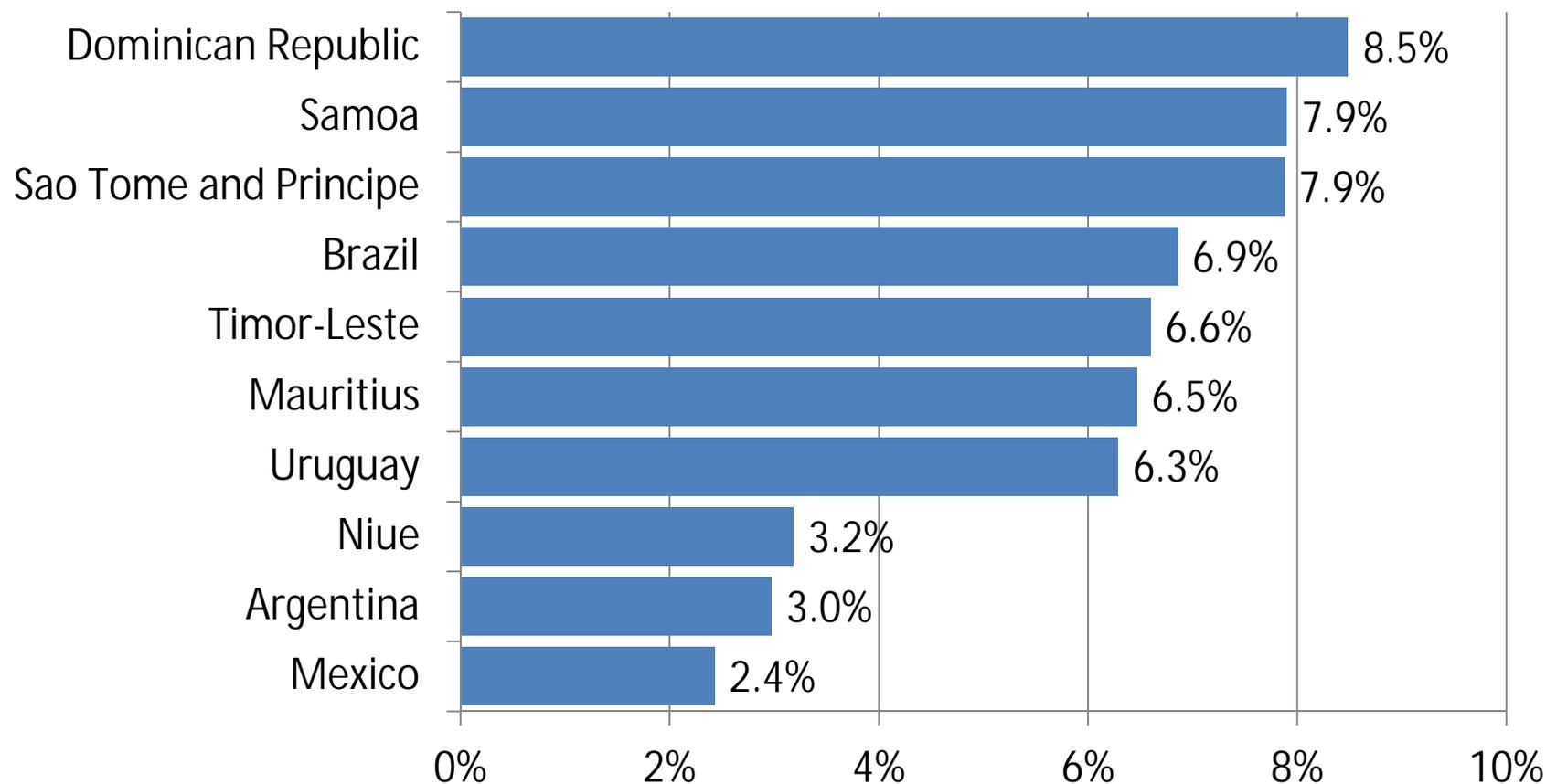
*= countries on the DAC list, see

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

Developing and transition countries*: Distribution of organic producers and agricultural land in 2010



Developing and transition countries: The ten countries with the largest highest shares of organic agricultural land 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