

## Organic Agriculture 2013: Key Indicators and Leading Countries

Indicator	World	Leading countries
Countries with data on certified organic agriculture <sup>1</sup>	2011: 162 countries	
Organic agricultural land	2011: 37.2 million hectares (1999: 11 million hectares)	Australia (12 mio. hectares, 2009) Argentina (3.8 mio. hectares) US (1.9 mio. hectares, 2008)
Share of total agricultural land	2011: 0.86 % <sup>2</sup>	Falkland Islands (Malvinas) (35.9 %) Liechtenstein (29.3 %) Austria (19.7 %)
Further, non-agricultural organic areas (mainly wild collection)	2011: 32.5 million hectares (2010: 43 million hectares; 2009: 41 million hectares)	Finland (7 million hectares) Zambia (5.9 million hectares; 2009) India (4.5 million hectares)
Producers	1.8 million producers (2010: 1.6 million producers; 2009: 1.8 million producers)	India (547'591), Uganda (188'625, 2010), Mexico (169'570)
Organic market size	62.9 billion US dollars (2010: 59.1 billion US dollars; 1999: 15.2 billion US dollars) Source: Organic Monitor	US (21 billion euros or 29 billion US dollars), Germany (6.6 billion euros or 9.2 billion US dollars) France (3.7 billion euros or 5.2 billion US dollars)
Per capita consumption	2011: 9.02 US dollars <sup>3</sup>	Switzerland (177.4 euros or 250.4 USD), Denmark (161.9 euros or 225.7 USD) Luxemburg (134.3 euros or 187.3 USD)
Number of countries with organic regulations 2011	86 countries (2010: 84 countries)	
Organic certifiers 2010	2012: 576 certifiers (2011: 549; 2010 532)	South Korea, Japan, USA
Number of IFOAM affiliates	1.1.2013: 766 affiliates from 117 countries	Germany: 96 affiliates; India: 46 affiliates; China: 40 affiliates; United States: 33 affiliates; The Netherlands: 31 affiliates

Source: FiBL and IFOAM; for total global market: Organic Monitor; for number of certifiers: Organic Standard/Grolink.

<sup>1</sup> Where the designation "country" appears in this book, it covers countries or territories.

<sup>2</sup> Share of the countries included in the FiBL-IFOAM survey 2013.

<sup>3</sup> Total world population 6.97 billion in 2011 according to FAO stats. FAO, Rome; <http://faostat.fao.org/site/550/DesktopDefault.aspx?PageID=550#ancor> Last updated June 23, 2011.

## The World of Organic Agriculture 2013: Summary

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### Key data on organic agriculture

According to the latest FiBL-IFOAM survey on certified organic agriculture worldwide,<sup>4</sup> (data as of end of 2011), data on organic agriculture are available from 162 countries (up from 160 in 2010).

There are 37.2 million hectares of organic agricultural land (including in-conversion areas). The regions with the largest areas of organic agricultural land are Oceania (12.2 million hectares, 33 percent of the world's organic agricultural land) and Europe (10.6 million hectares, 29 percent). Latin America has 6.9 million hectares (18.4 percent) followed by Asia (3.7 million hectares, 10 percent), North America (2.8 million hectares, 7.5 percent) and Africa (1.1 million hectares, 3 percent). For the detailed results of the FiBL-IFOAM survey, see page 36.

The countries with the most organic agricultural land are Australia (12 million hectares), Argentina (3.8 million hectares), and the United States (1.9 million hectares).

Currently 0.9 percent of the agricultural land of the countries covered by the survey is organic. By region, the highest shares of the total agricultural land are in Oceania (2.9 percent) and in Europe (2.2 percent). In the European Union, 5.4 percent of the farmland is organic. However, some countries reach far higher shares: Falkland Islands: 35.9 percent; Liechtenstein: 27.3 percent; Austria 19.7 percent. In ten countries, more than ten percent of the agricultural land is organic.

There has been an increase of the organic agricultural land in Asia, Europe, North America and Oceania. For Asia, after a major drop of organic land in 2010, 0.9 million more hectares were reported. There was also strong growth in Europe, where the area increased by 0.6 million hectares (6 percent). In Latin America the organic land decreased, mainly due to a decrease of organic grazing areas in Argentina.

Apart from agricultural land, there are further organic areas, most of these being areas for wild collection. Other areas include aquaculture, forests, and grazing areas on non-agricultural land. They constitute 32.5 million hectares. In total, 69.7 million hectares (agricultural and non-agricultural areas) are organic.

There were 1.8 million producers in 2011. Thirty-four percent of the world's organic producers are in Asia, followed by Africa (30 percent), and Europe (16 percent). The countries with the most producers are India (547'591), Uganda (188'625, 2010), and Mexico (169'570).

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<sup>4</sup> The survey included both fully converted and in-conversion organic areas.

About one third of the world's agricultural land (12 million hectares) and more than 80 percent (1.5 million) of the producers are in developing countries and emerging markets.

Land use details were available for almost 90 percent of the organic agricultural land. Unfortunately, some countries with very large organic areas, such as Australia, Brazil, China, and India had no or only little information on their land use. Almost two-thirds of the agricultural land was grassland/grazing areas (23.2 million hectares). With a total of at least 6.3 million hectares, arable land constitutes 17 percent of the organic agricultural land. An increase of seven percent over 2010 was reported. Most of this category of land is used for cereals including rice (2.6 million hectares), followed by green fodder from arable land (2.2 million hectares), oilseeds (0.5 million hectares), protein crops (0.3 million hectares), and vegetables (0.2 million hectares).

Permanent crops account for approximately seven percent of the organic agricultural land, amounting to 2.6 million hectares. Compared with the revised data of the previous survey, the permanent cropland has remained steady. The most important permanent crops are coffee (with 0.6 million hectares), constituting almost one-fifth of the organic permanent cropland, followed by olives (0.5 million hectares), nuts and grapes (0.3 million hectares each), and cocoa (0.2 million hectares).

Most of the wild collection area (including areas for beekeeping) is in Europe (36 percent of the global total) and Africa (35 percent). Not much detail on the crops harvested is available. Berries, medicinal and aromatic plants, and fruit are among the most important crops.

### **Global market**

In spite of the slowdown in the global economy, international sales of organic products continue to rise. Organic Monitor estimates organic food & drink sales reached almost 63 billion US dollars in 2011. The market has expanded by 170 percent since 2002. Demand for organic products is mainly in North America and Europe; these two regions comprise more than 90 percent of sales. Although organic farming is now practiced in every continent, demand is concentrated in these regions. Production of organic foods in other regions, especially Asia, Latin America and Africa is mainly export-g geared. The organic food sector in some countries is almost entirely dependent on exports. (See chapter by Amarjit Sahota, page 132).

In 2011, the countries with the largest organic markets were the United States, Germany, and France. The largest single market was the United States. The highest per-capita consumption was in Switzerland, Denmark, and Luxemburg. The highest market shares were reached in Denmark, Switzerland and Austria. (See chapter on the global survey on organic agriculture, page 208).

### **Africa**

There are slightly more than one million hectares of certified organic agricultural land in Africa. This constitutes about three percent of the world's organic agricultural land. There were 541'000 producers. Uganda is the country with the largest organic area (with more than 220'000 hectares) and with the largest number of organic producers. The country with the highest share of organic agricultural land is the island state Sao Tome

and Principe with 8 percent of its agricultural area being organic. The majority of certified organic produce in Africa is destined for export markets. Key crops are coffee, olives, cocoa, oilseeds, and cotton. The European Union is Africa's largest market for agricultural produce. There is a growing recognition among policy makers that organic agriculture has a significant role to play in addressing the pressing problems of food insecurity, poverty, and climate change in Africa. Significant breakthroughs were achieved in 2012: Currently, the Action Plan of the Ecological Organic Agriculture (EOA) Initiative has been implemented on a pilot basis in six countries: Kenya, Tanzania, Uganda, and Ethiopia in eastern Africa; Nigeria in western Africa; and Zambia in southern Africa. At the Second African Organic Conference held in Lusaka, Zambia, in May 2012, "The Lusaka Declaration on Mainstreaming Organic Agriculture into the African Development Agenda" was adopted. It will be used to continue lobbying a comprehensive range of stakeholders capable of unlocking the potential that organic/ecological agriculture offers for Africa. The next African Organic Conference will be held in Nigeria in 2015. (See article by Hervé Bouagnimbeck, page 164).

## Asia

The total organic agricultural area in Asia is nearly 3.7 million hectares. This constitutes ten percent of the world's organic agricultural land. There were almost 0.6 million producers; 0.55 million are in India. The leading countries by area are China (1.9 million hectares) and India (1.1 million hectares); Timor-Leste has the highest proportion of organic agricultural land (almost seven percent). Compared with 2010, organic agricultural land increased by almost one million hectares, mainly due to major increases in China and India. Market and trade data remain scarce. (For details see chapter on FiBL-IFOAM survey, page 199).

The Asian market for organic products is growing at a steady rate. Rising awareness of organic production methods is fuelling demand for organic food & drink. The continent is, however, divided in terms of consumption and production. Most organic product sales are from the affluent countries, such as Japan, South Korea, Taiwan, Hong Kong, Malaysia and Singapore. However, a small share of the organic products sold is grown in these countries. Large quantities of organic food & drink products (especially processed foods) are imported from Australasia, Europe and the US into these countries. (See chapter by Amarjit Sahota, page 132).

Other Asian countries mainly have export-g geared organic food sectors whereby organic crops are grown for other regions. The Chinese revised organic rules, implemented in March 2012, were the big topic in the region in 2012. Reports from country contacts noted that 2012 has been a fair to good year for sector development. Domestic markets based on participatory guarantee systems are growing. A resurgence in regional collaboration, which was boosted by the IFOAM Organic World Congress held in November 2011 in Korea, precipitated the reconstitution of Organic Asia as an Internal Body of IFOAM. For details see chapters on organic farming in Asia by Ong Kung Wai, page 178. A country report on organic farming in Saudi Arabia by Hartmann et al. informs about the development of the sector in a country of the Middle East (page 191).

## Europe

As of the end of 2011, 10.6 million hectares of agricultural land in Europe were managed organically on almost 290'000 farms. In Europe, 2.2 percent of the agricultural area, and in the European Union, 5.4 percent of the agricultural area is organic. Twenty-nine percent of the world's organic land is in Europe. Compared to 2010, organic farmland increased by 0.6 million hectares. The countries with the largest organic agricultural area are Spain (1.6 million hectares), Italy (1.1 million hectares), and Germany (1 million hectares). There are seven countries in Europe with more than ten percent organic agricultural land: Liechtenstein (29.3 percent), Austria (19.7 percent), Sweden (15.2 percent), Estonia (14.8 percent), Switzerland (11.7 percent), Czech Republic (10.7 percent) and Latvia (10.4 percent). Sales of organic products were approximately 21.5 billion euros in 2011, an increase of 9 percent over 2010. The largest market for organic products in 2011 was Germany with a turnover of 6.6 billion euros, followed by France (3.8 billion euros) and the UK (1.9 billion euros) (see article by Diana Schaack et al., page 224). The new research project OrganicDataNetwork that was launched in early 2012 is expected to be a major step towards improving European market data (see articles by project coordinator Raffaele Zanolì, page 230, and by Home et al., page 232). Currently a revision process of the EU regulation is underway, which was started with three hearings at the Commission in 2012. In January 2013, a consultation for the review of the European policy on organic agriculture was launched by the European Commission. Regarding organic farming research, it is expected that the successful work of the Technology Platform TP Organics will result in more funding for organic farming research under the European Union's next framework programme. A number of country reports about organic farming in south eastern European countries are included in this book; they all show the increasing importance of organic farming in these countries: Albania by Iris Kazazi and Thomas Bernet (page 234), Hungary by Zoltán Dezsény and Dóra Drexler (page 239), Kosovo by Sylë Sylanaj (page 244), Montenegro by Natasa Mirecki (page 246) and Serbia by Guido Haas (page 251).

## Latin America

In Latin America, more than 315'000 producers managed 6.9 million hectares of agricultural land organically in 2011. This constitutes 18 percent of the world's organic land and 1.1 percent of the region's agricultural land. The leading countries are Argentina (4.2 million hectares), Uruguay (0.9 million hectares, 2006) and Brazil (0.7 million hectares). The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.9 percent), French Guyana (17.5 percent), and the Dominican Republic (9.5 percent).

While exports remain the main activity, the domestic market for organic products is becoming more diverse and is steadily growing; especially in Mexico, Costa Rica and South America. The most developed domestic market is in Brazil, in which farmers' street markets and cooperatives have been organized for 30 years, and where a balance has been kept between domestic and international organic markets. Following Brazil, other countries in the region, including Ecuador, Colombia, Mexico and Peru, have started to develop alternative certification schemes and marketing strategies aiming at directly reaching responsible consumers. The main destination markets for organic exports, which constitute approximately 85 percent of the region's production, are the

European Union, the United States, and Japan. For countries with tropical and mountain ecosystems, the main organic export products are coffee, cacao, banana, and quinoa. For countries with extensive land areas with pastures for animal grazing, the main products are meat and wool. Argentina and Costa Rica are the only countries in the region with third country status for the European Union although most Latin American countries are applying for this status: a process that started ten years ago when governmental organic regulations began to be developed in the region. For details see article by Patricia Flores on page 258.

### North America

In North America, almost 2.8 million hectares of farmland are managed organically, of these nearly two million in the United States (2008 data) and 0.8 million in Canada representing approximately 0.7 percent of the total agricultural area in the region and 7 percent of the world's organic agricultural land.

Driven by consumer choice, the U.S. organic industry grew by 9.5 percent overall in 2011 to reach 31.5 billion US dollars in sales. Of this, the organic food and beverage sector was valued at 29.22 billion US dollars, according to findings from the Organic Trade Association's (OTA's) 2012 Organic Industry Survey. In the U.S., overall organic product sales growth of 9.5 percent continued to outpace total sales of comparable conventionally produced food and non-food items, which experienced 4.7 percent growth. Organic food sales experienced 9.4 percent growth in 2011. The easing of the recession, consumer price inflation due to input price increases, and consumers' increasing desire for convenience products were all factors that elevated growth for the year. The organic food sector grew by 2.5 billion US dollars during 2011, with the fruit and vegetable category contributing close to 50 percent of the growth. The fastest-growing sector was the meat, fish & poultry category, posting 13 percent growth over 2010 sales.

Canada's organic market continues to grow and broaden at the consumer level, with evidence of many new product offerings, a continued "mainstreaming" of organic products into conventional retail locations, and obvious growth in non-food sectors such as personal care. In the absence of more current data, the Canada Organic Trade Association (COTA) has maintained its estimated market value of 2.6 billion Canadian dollars (2010), though it is likely this significantly underrepresents the true market place.

For the U.S. organic sector, the biggest milestone for 2012 was the signing and implementation of an historic equivalency arrangement between the United States and European Union (EU). In late 2012, Swiss and Canadian authorities announced an equivalency arrangement between the two countries.

For more details on recent developments, see articles by Barbara Haumann on the United States (page 282) and by Matthew Holmes and Anne Macey on Canada (page 288) in the North American section of this book.

### Oceania

This region includes Australia, New Zealand, and Pacific Island states including Fiji, Papua New Guinea, Tonga, and Vanuatu, among others. Altogether, there were almost

14'000 producers, managing 12.2 million hectares. This constitutes 2.9 percent of the agricultural land in the region and 33 percent of the world's organic land. More than 98 percent of the organic land in the region is in Australia (12 million hectares in 2009, 97 percent of which is extensive grazing land), followed by New Zealand (133'000 hectares), and Samoa (34'000 hectares). The highest shares of all agricultural land are in Samoa (11.8 percent), followed by Australia (2.9 percent, 2009) and the Solomon Islands (1.6 percent). Growth in the organic industry in Australia, New Zealand, and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic sales are, however, also growing. In Australia, the domestic market was valued at 1.15 billion Australian dollars in 2011-12<sup>1</sup> and in New Zealand at 360 million New Zealand dollars (2011).<sup>2</sup>

There has been little change in the last few years of the Australian regulatory instruments overseeing sales of domestic and export products. The Australian Standard for Organic and Biodynamic Products (AS6000) was published by Standards Australia in 2009 to establish a domestic standard for certification of organic products, but to date has not been broadly adopted by the industry for certification. As the growth of the Australian market continues, the structures of the industry informing policy development are also undergoing some change. The peak body of the Australian industry, the Organic Federation of Australia (OFA), has delivered considerable outputs and continues to respond to Australian and international policy reviews in agriculture and food policy. As to research, the Rural Industries Research and Development Corporation (RIRDC) has practically ceased its activities related to organic farming and there seems to be very little going on in the area of public funding of research and education that is specific to organic agriculture in Australia (See article by Els Wynen and Alexandra Mitchell, page 298).

Most of the organically certified products from the Pacific Islands are produced for export. Key products are vanilla, coconut, and tropical fruit. The main international markets are Australia and New Zealand, due to their proximity, although Japan is a growing market and other markets include North America and the European Union. Domestic markets for organic certified products are not very developed, and in some cases are non-existent. National governments continue to support certification costs for small holders in Samoa and Tonga. In September 2012, the Ministers of Agriculture and Forestry Conference in Fiji endorsed the recommendation to include mainstream organic agriculture into the agriculture strategies of the Secretariat of the Pacific Community and that of the individual countries. This is an encouraging step and should facilitate increased support for organic growers across the region. Momentum of the movement remains strong across the region, and the outlook for the development of organics in the region is positive. Interest in organic products from the region appears to be growing. A key challenge is building production to meet projected demands (see chapter by Karen Mapusua, page 303).

<sup>1</sup> 1 Australian dollar = 0,7410 euros (average exchange rate 2011); Source: <http://www.oanda.com/lang/de/currency/average>

<sup>2</sup> 1 New Zealand dollar = 0,6047 euros in 2011 (average exchange rate 2011); Source: <http://www.oanda.com/lang/de/currency/average>

## Standards and regulations

According to the *FiBL survey on organic rules and regulations*, the number of countries with organic standards has increased to 86. There are 26 countries that are in the process of drafting legislation. A major development in 2012 was that the European Union and the United States achieved a breakthrough in their negotiations concerning the mutual recognition of their organic standards and control systems. The agreement makes it possible for organic products (with a few exceptions) certified in the EU or the USA to be sold in the other country/region without any further inspection or certification. The EU-US agreement came into force by July 1, 2012 together with the revised European import scheme for organic products. With the new EU scheme, imports in the EU are possible for products certified by a control body recognized for operations in the respective export country. The EU recognizes certification bodies either via the so-called Third Country list or directly. In the Asian region, the dominating topic in 2012 was the implementation of revised production rules in China – further tightening the already strict rules (see contribution by Huber et al. on page 140).

In 2010, IFOAM led the way forward by creating the *COROS – Common Objectives and Requirements of Organic Standards*. Standards deemed to be equivalent to the COROS can be included in the *IFOAM Family of Standards*; to draw a line between what is organic and what is not. The Family is a key part of the Organic Guarantee System, which qualifies as a valid standard because it is deemed equivalent to the COROS. Aiming to further lead and unite the organic world, IFOAM offers a branding mark for products from operators in good standing in the OGS - the Global Organic Mark. In 2012, IFOAM began forming partnerships in Thailand and Malaysia with the first organizations to act as agents for spreading the Global Organic Mark in their respective countries. IFOAM anticipates further promotion of the Mark in other countries, by other agents and through direct efforts from the IFOAM Head Office itself. For more information see the article by David Gould on page 154.

The total *number of certification bodies* is 576; up from 549 in 2011. Most certification bodies are located in the European Union, South Korea, Japan, the United States, China, India and Canada. For the first time, Asia now has more organic certification bodies than Europe. There has been a slight decrease in the number of certification bodies in most regions of the world, although the number has increased rapidly in South Korea (see article by Kolbjörn Örjavi, page 149).

*Participatory Guarantee Systems (PGS)* are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks, and knowledge exchange. It is estimated that at least 41 PGS initiatives exist now on all continents, and a similar number of initiatives are currently under development. Asia and Latin America remain the leaders in terms of both the number of farmers certified through PGS and the level of recognition achieved by the national governments (see article by Flávia Castro, page 159).

## IFOAM and the road to sustainable development

The General Assembly of the Global Organic Movement in 2011 in Korea approved a mandate to IFOAM to lead development of organic agriculture towards sustainability. As a consequence, in 2012, the IFOAM World Board initiated the Sustainable Organic

Agriculture Action Network (SOAAN). The purpose of SOAAN is to support the organic movement in identifying the areas where organic agriculture is sustainable and the areas where it needs to do more. SOAAN's goal is to contribute to improved sustainability and to increase the overall impact of organic farming and of other social and environmental standards. At the "Bonn Sustainability Days", from November 23rd to 26th 2012, experts discussed sustainable development in agriculture and the way forward for the organic sector. The year 2013 will see broad consultations of the draft of the Best Practice Reference document that describes the vision for sustainable agriculture practice in detail, describes detailed practices that lead to the manifested objectives embodied by the principles of organic agriculture, and aims to provide guidance to further develop the organic sector. For more information see article by Markus Arbenz, page 314.

