



Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2014 Part 1: Global data and survey background

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Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, March 2014

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Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2014: Part 1: Global data and survey background

- › Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, in cooperation with the International Federation of Organic Agriculture Movements IFOAM, based on national data sources and data from certifiers.
- › Data as published February 2014 in FiBL & IFOAM (2014) The World of Organic Agriculture. Statistics and Emerging Trends 2014. Frick and Bonn
- › For updates check www.organic-world.net and <http://www.organic-world.net/yearbook-2014.html>
- › This presentation is available online at: <http://www.organic-world.net/yearbook-2014-presentations.html>
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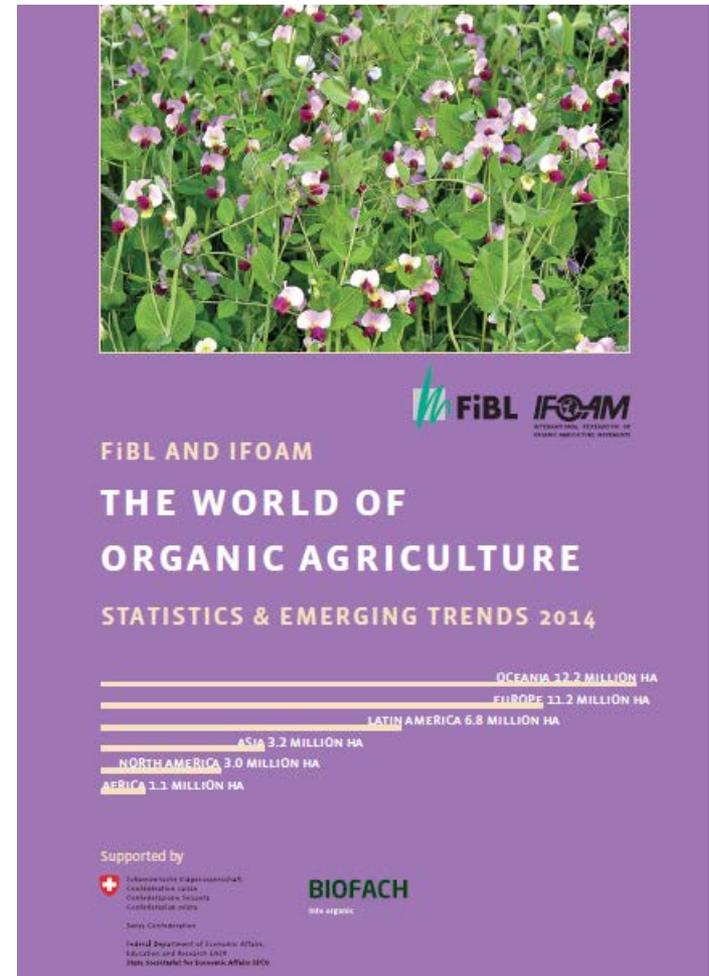
- › The Swiss State Secretariat of Economic Affairs SECO, Berne
- › Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair
- › Co-funding from the European Union for the European data survey in the framework of the OrganicDatane트워크 project
- › 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2014.



* See also disclaimer on last page of this slide show

The World of Organic Agriculture 2014

- › The 15th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2014.*
- › Contents:
 - › Results of the survey on organic agriculture worldwide;
 - › Organic agriculture in the regions and country reports;
 - › Australia, Canada, Croatia, the Pacific Islands, United Arab Emirates, and The United States of America.
 - › Chapters on the global market, standards & legislations, voluntary standards, PGS, European market and tea production in China
 - › Numerous tables and graphs.
 - › The book can be ordered via IFOAM.org and shop.FiBL.org.
 - › *Willer, H, Lernoud, J, (Eds.) (2014) The World of Organic Agriculture. Statistics and Emerging Trends 2014. 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

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The World of Organic Agriculture 2013

The 14th edition of "The World of Organic Agriculture" will be launched at BioFach 2013 at NürnbergMesse, Nuremberg, Germany. The presentation will be on February 13, 2013, from 2 to 2.45 pm, room St. Petersburg.

The 14th edition of The World of Organic Agriculture documents recent developments in global organic agriculture. It includes contributions from representatives of the organic sector from throughout the world and provides comprehensive organic farming statistics that cover surface area under organic management, specific information about land use in organic systems, numbers of farms and other operator types as well as selected market data.

The book also contains information on the global market for organic food, the latest developments in organic certification, information on standards and regulations as well as insights into current and emerging trends for organic agriculture in Africa, Asia, Europe, Latin America, North America and Oceania.

In addition, the volume contains a number of country reports: Albania, Australia, Canada, Hungary, Kosovo, Montenegro, Serbia, Pacific Islands, and the United States.

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The World of Organic Agriculture 2013



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ORGANIC AGRICULTURE
STATISTICS & EMERGING TRENDS 2014

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About this presentation

- › There are 3 presentations summarizing the key results of the FiBL-IFOAM survey on organic agriculture worldwide 2014 (data 2012). Apart from the global data, key results on crop and on regional data are presented.
- › The following three presentations are available at <http://www.organic-world.net/yearbook-2014-presentations.html>:
 - › Part 1: Global data 2012 and survey background
 - › Part 2: Land use and key crops in organic agriculture 2012
 - › Part 3: Organic agriculture in the regions 2012

The 15th Survey on organic agriculture world-wide

- › The 14th 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 2013 and February 2014.
- › Data were received from 164 countries.
- › New countries included: Angola, Bermuda and San Marino.
- › Updated data on area and producers were available for 129 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; Export and imports data; Livestock data (animal heads and production tones);
- › The results are published in the yearbook “The World of Organic Agriculture 2014” and at www.organic-world.net.

Countries covered by the survey on organic agriculture 2012

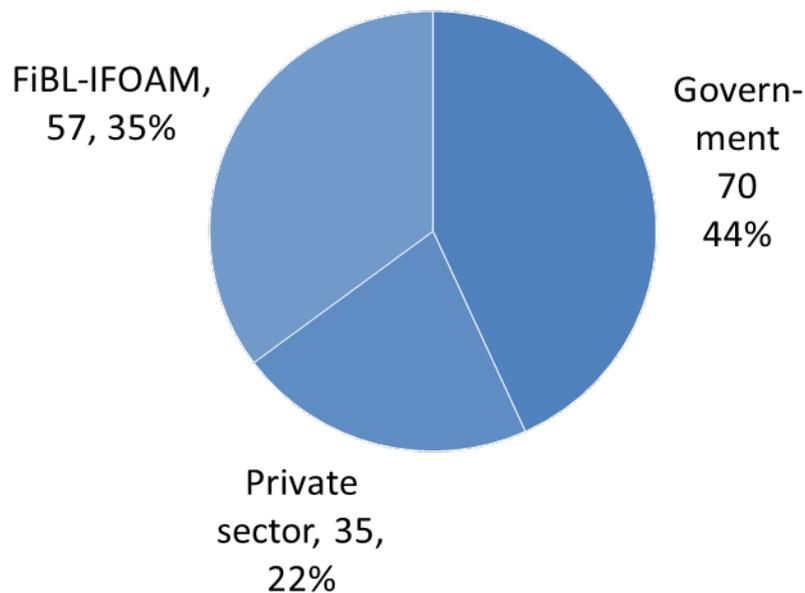
Table 1: Countries and territories covered by the global survey on organic agriculture 2012

	Countries* with data on organic agriculture	Countries per region¹	Share of countries that provided data (%)
Africa	38	57	67
Asia	37	49	76
Europe	46	46	100
Latin America and Caribbean	28	45	62
North America	3	5	60
Oceania	11	23	49
World	164	224	73

Source: FiBL-IFOAM survey 2014

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

Organic data collection systems world-wide for data on area, operators and production (total 164 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



CONTROL UNION CERTIFICATIONS



Soil Association

Networks, transnational data collection efforts



General notes on the data

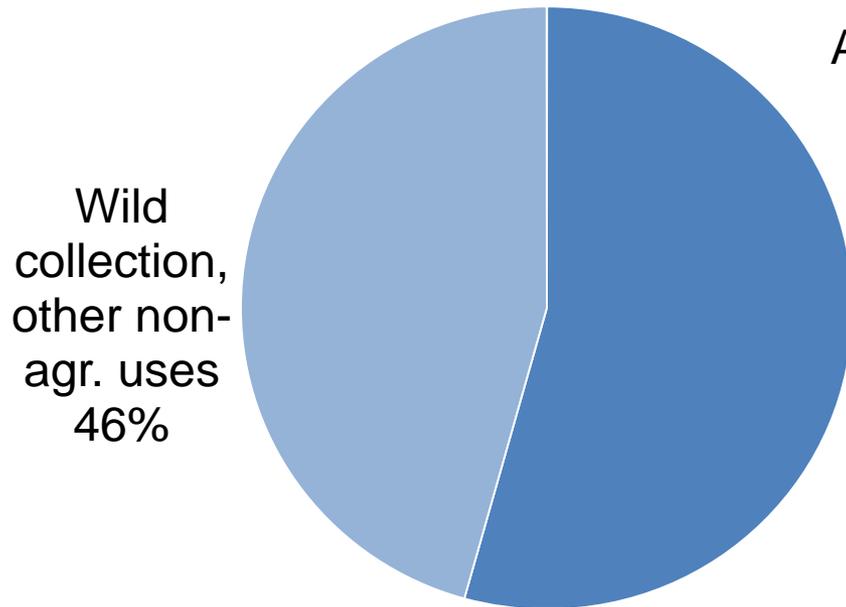
- › Data sources: For data sources see annex of The World of Organic Agriculture 2014 or www.organic-world.net/statistics-data-sources.html
- › Countries: For countries and areas, FiBL and IFOAM used the Standard Country and Area Codes Classifications as defined by the United Nations Statistics division.
- › 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 2012

- › 164 countries have data on organic agriculture.
- › 37.5 million hectares of agricultural land are organic (including conversion areas).
- › 10 countries have more than ten percent organic agricultural land, and 17 countries have between 5 and 10 percent organic agricultural land.
- › There are more than 31 million hectares of further, non agricultural areas.
- › 1.9 million producers were reported.

Definition of organic areas

Source: FiBL-IFOAM Survey 2014

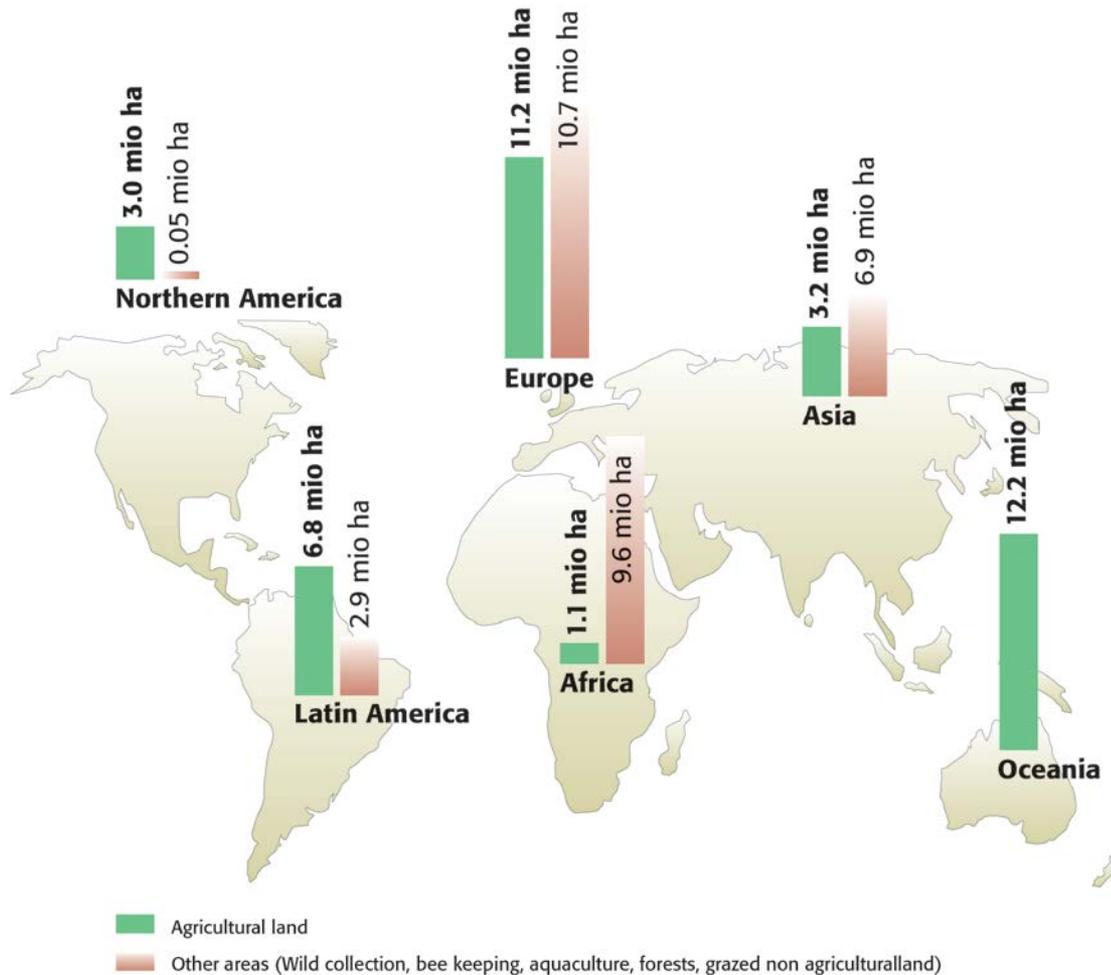


- > Agricultural land (37.5 million hectares in 2012)
 - > Cropland
 - > **Arable land** (cereals, vegetables etc.)
 - > **Permanent crops** (fruit, grapes, olives ...)
 - > **Cropland, no details** (=arable land and permanent crops with no further details)
 - > Permanent grassland
 - > Other agricultural land
- > Non-agricultural areas (31.5 million hectares in 2012)
 - > Wild collection/Bee keeping
 - > Forest
 - > Aquaculture
 - > Grazing areas on non-agricultural land

Organic agricultural land by region 2012

- › Currently 37.5 million hectares are under organic agricultural management (end of 2012 for most data).
- › The distribution of the organic agricultural land is as follows:
 - › Oceania (12.2 million hectares);
 - › Europe (11.2 million hectares);
 - › Latin America (6.8 million hectares),
 - › Asia (3.2 million hectares),
 - › North America (3.0 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 30 percent of the world's organic agricultural land. Latin America is has 18 percent of the world's organic land.
- › In addition to the agricultural land, there are 31.5 million hectares of non-agricultural areas, mainly wild-collection.

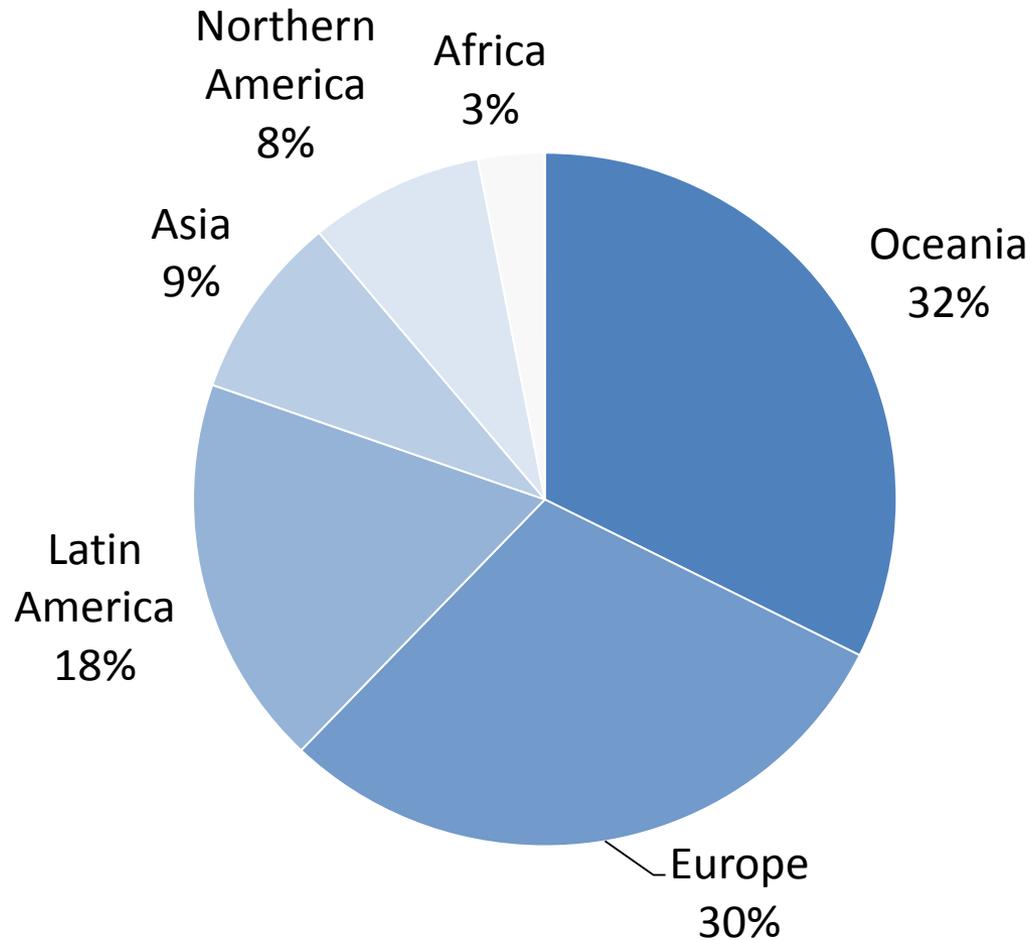
Organic agricultural land and other organic areas 2012



Organic agricultural land by region 2012

Distribution of organic agricultural land by region 2012

Source: FiBL-IFOAM survey 2014



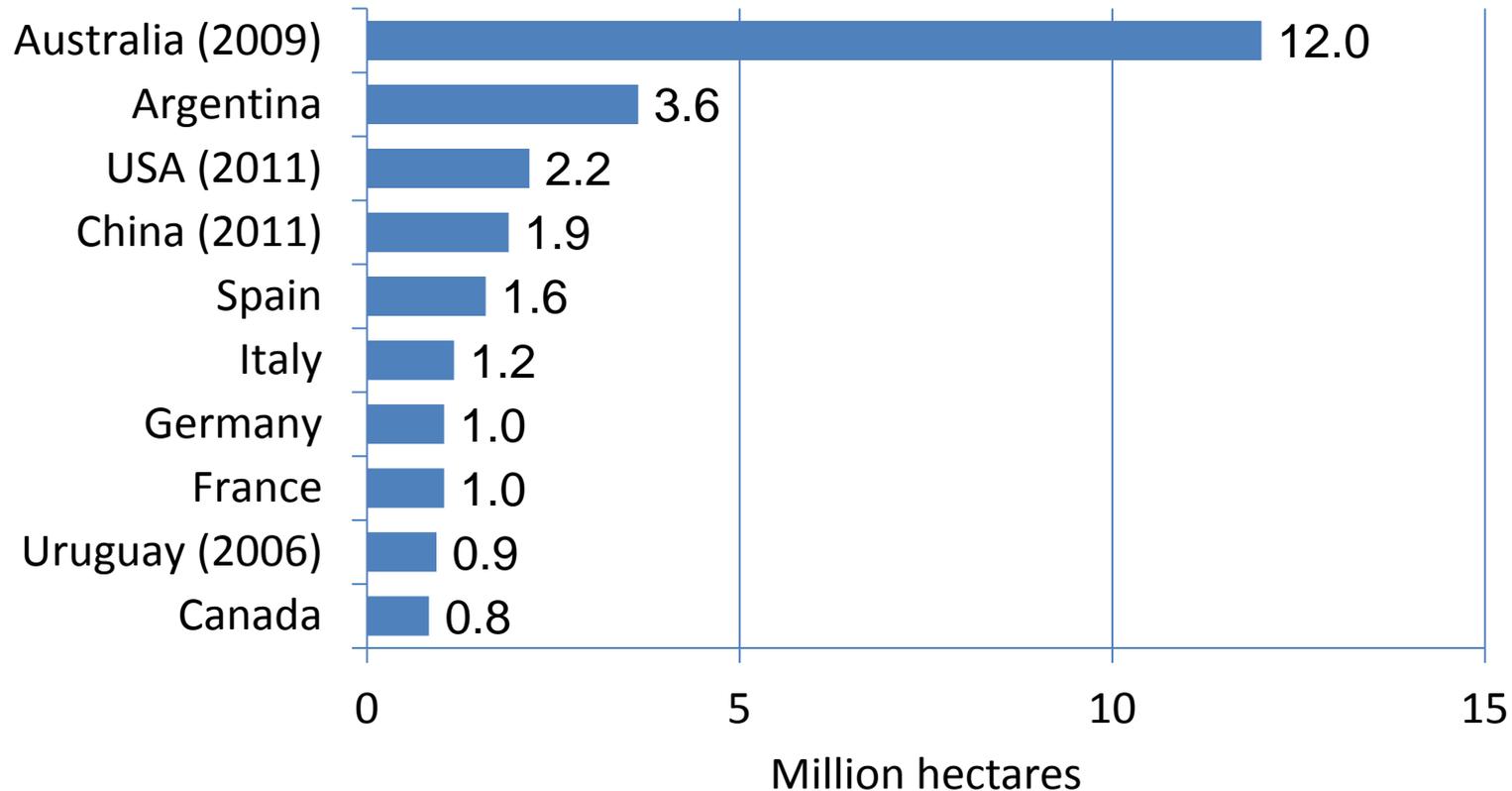
The countries with the most organic agricultural land 2012

- › 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 26.3 million hectares, constituting almost seventy percent of the world's organic agricultural land.

Organic agricultural land 2012: Top ten countries

The ten countries with the largest areas of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014



Share of organic land of total agricultural area 2012

- › 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 2.2 percent and Latin America with 1.1 percent.
- › In the 27 countries of the European Union, the share of organically managed land is 5.6 percent. In the other regions, the share of organically managed land is less than one percent.
- › Ten countries have more than 10 percent organic land and 17 countries have between 5 and 10 percent organic land.
- › However, 61 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 (29.6 percent) and Austria (19.7 percent).
- › It is interesting to note that many island states have high shares.

Shares of organic agricultural land by region 2012

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2012

Continent	Organic agr. land [ha]	Share of total agr. land*
Africa	1'145'827	0.1%
Asia	3'217'867	0.2%
Europe	11'171'413	2.3%
Latin America	6'836'498	1.1%
Northern America	3'012'354	0.7%
Oceania	12'164'316	2.9%
Total**	37'544'909	0.9%

Source: FiBL-IFOAM survey 2014.

*For the calculation of the shares of total agricultural land, only the countries that are included in the survey were used.

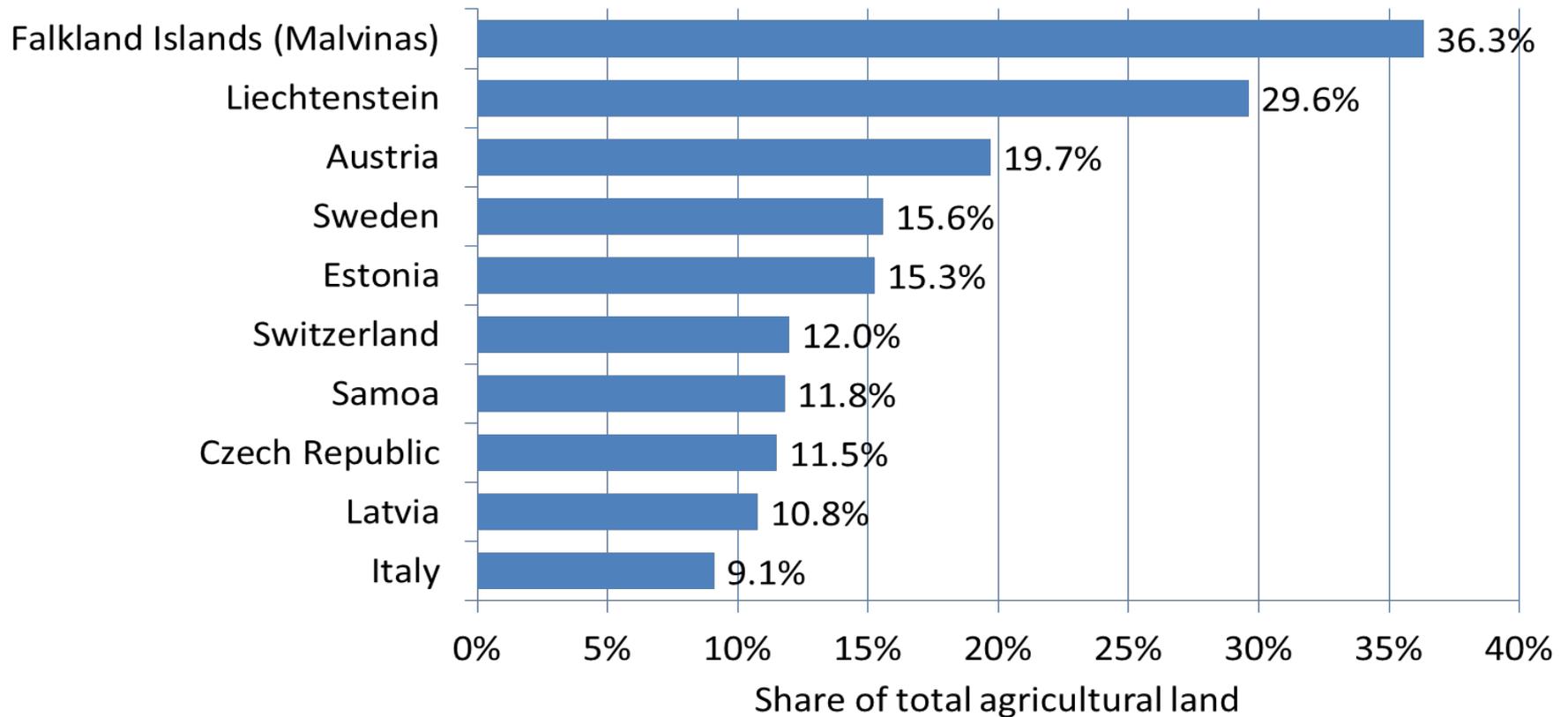
** Total includes correction value for French overseas departments.

(European Union: 5.6 %)

The highest shares of organic agr. land 2012

The ten countries with the highest shares of organic agricultural land 2012

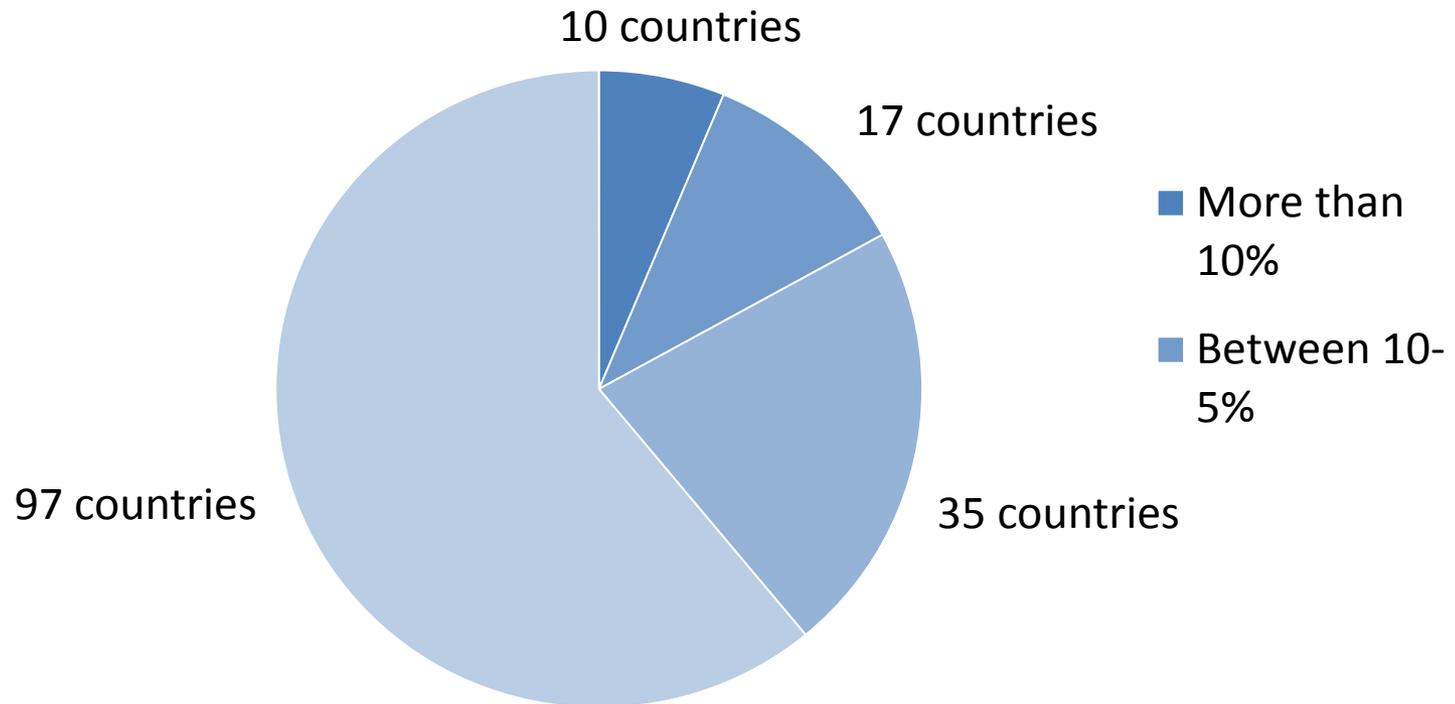
Source: FiBL-IFOAM survey 2014



Distribution of organic shares 2012

Distribution of organic shares of the total agricultural areas 2012 (total countries 164)

Source: FiBL-IFOAM Survey 201



Growth of the organic agricultural land 2012

- › Compared with the revised data from 2011, the organic agricultural land has increased by 0.5 percent in 2012, almost 200'000 hectares.
- › 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 2011-2012 by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2011/2012

Region	Organic agr. land (hectares) 2011	Organic agr. land (hectares) 2012	+/- in hectares	+/- percent %
Africa	1'073'404	1'145'827	+72'423	+6.75%
Asia	3'692'121	3'217'867	-474'254	-12.85%
Europe	10'535'550	11'171'413	+635'863	+6.04%
Latin America	6'855'457	6'836'498	-18'959	-0.28%
Northern America*	3'019'687	3'012'354	-7'333	-0.24%
Oceania	12'185'841	12'164'316	-21'525	-0.18%
Total**	37'359'076	37'544'909	+185'833	+0.50%

Source: FiBL-IFOAM survey 2014, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 286.

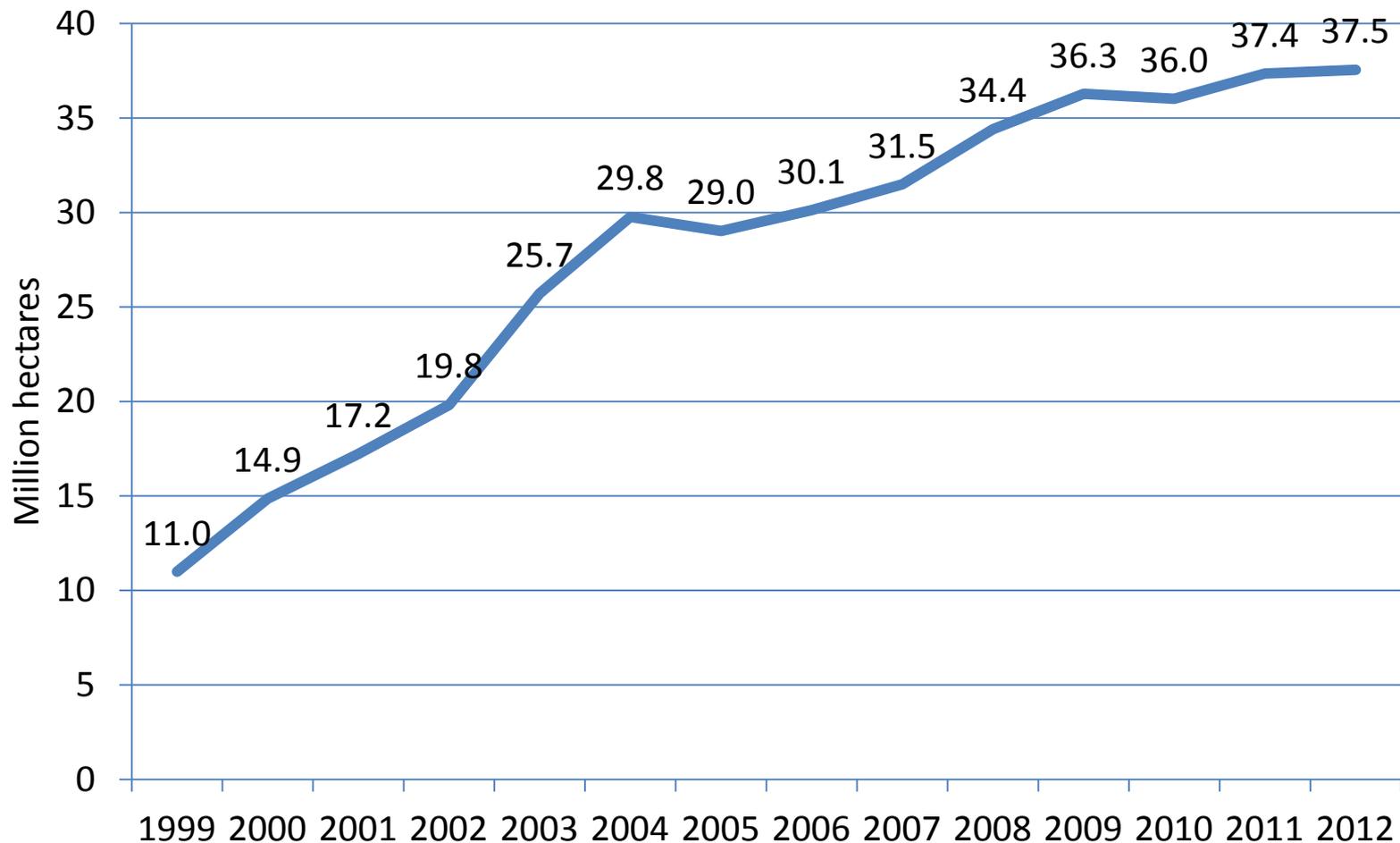
* For the United States the latest available data are from 2011.

** Total includes correction value for French Overseas Departments.

Growth of the organic farmland 1999-2012

Growth of the global organic agricultural land 1999-2012

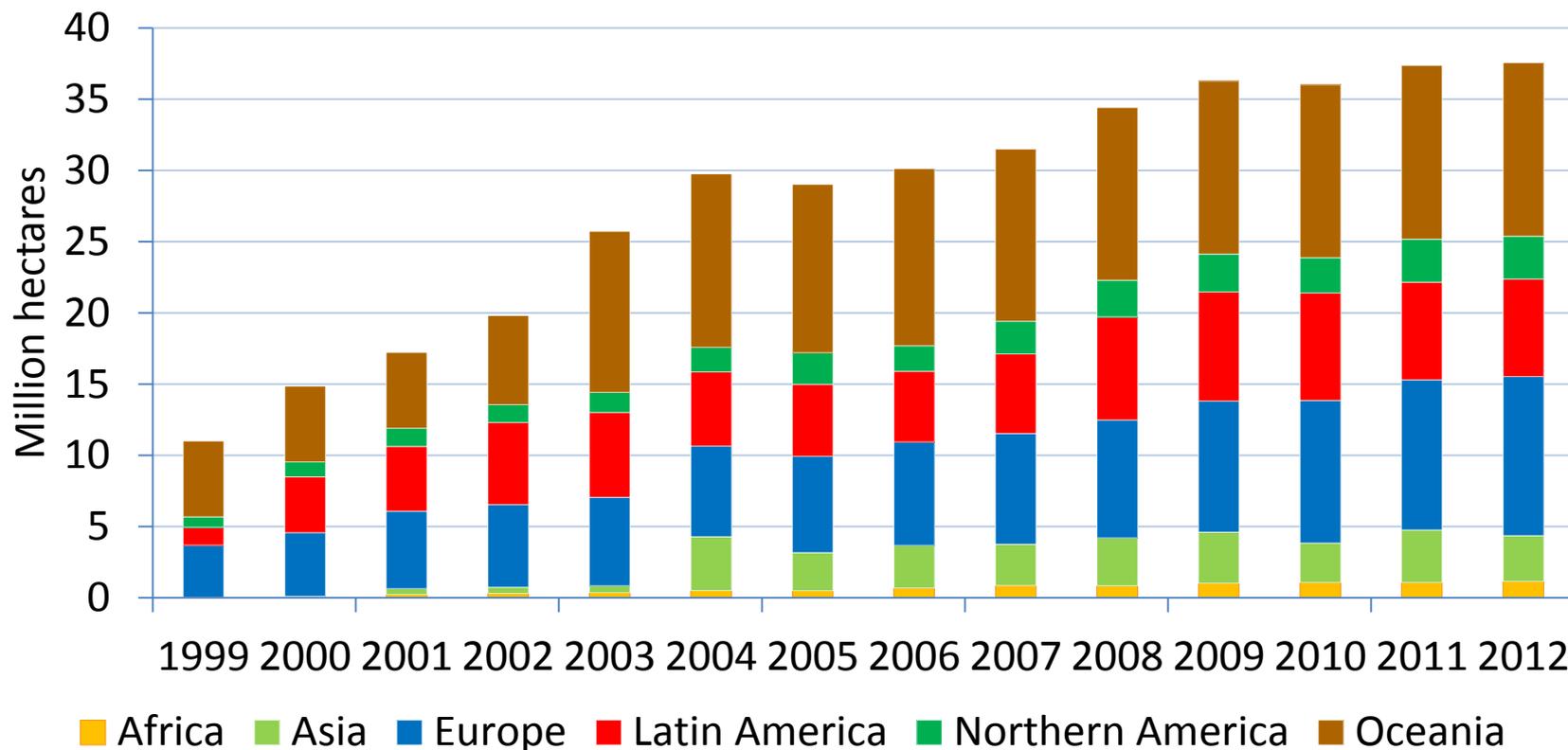
Source: FiBL-IFOAM-SOEL-Surveys 1999-201



Development of organic agr.land in the regions

Development of organic agricultural land in the regions 1999-2012

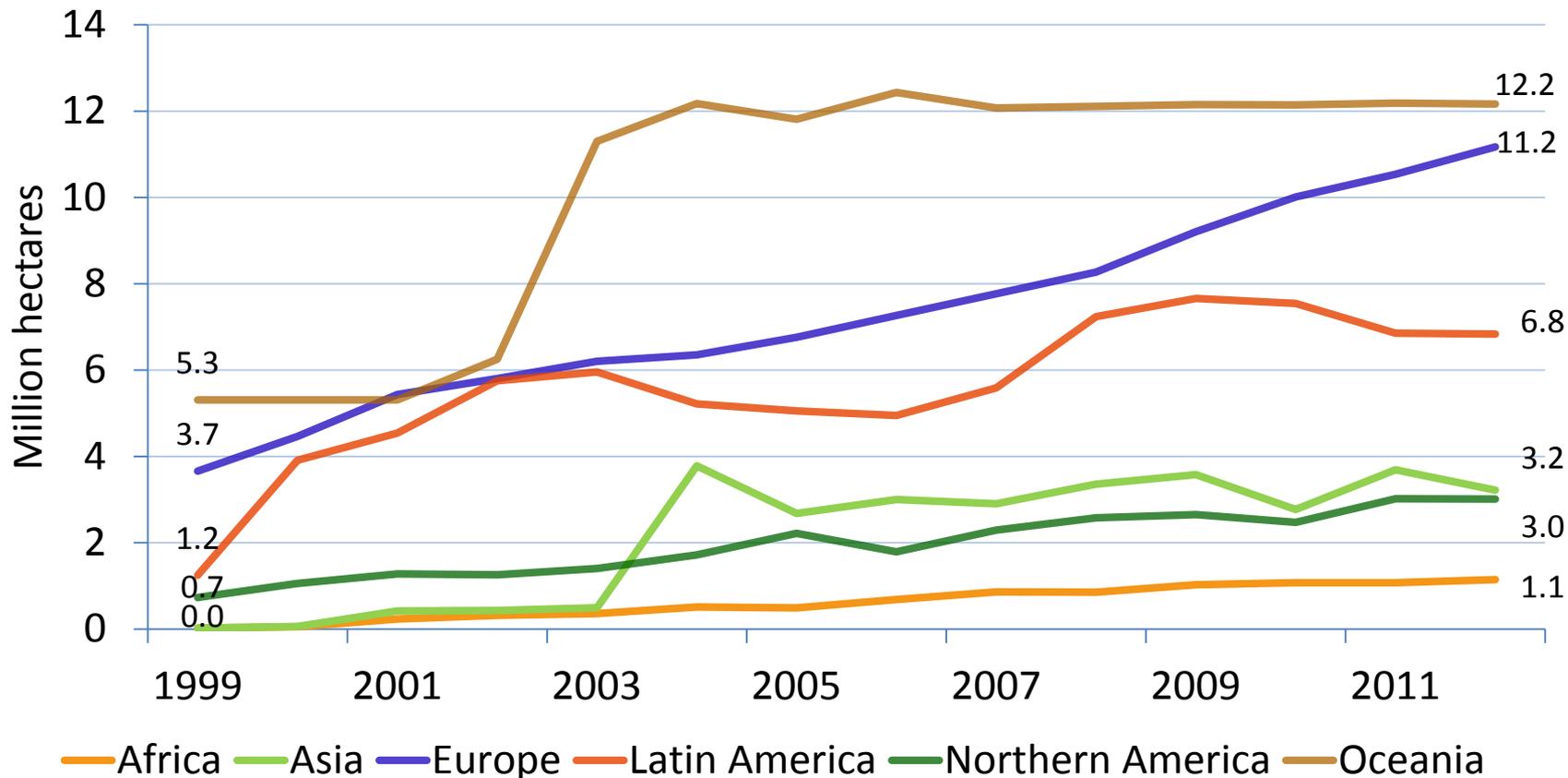
Source: FiBL-IFOAM-SOEL-Surveys 1999-20



Growth of organic agricultural land by region

Growth of the organic agricultural land by region 1999-2012

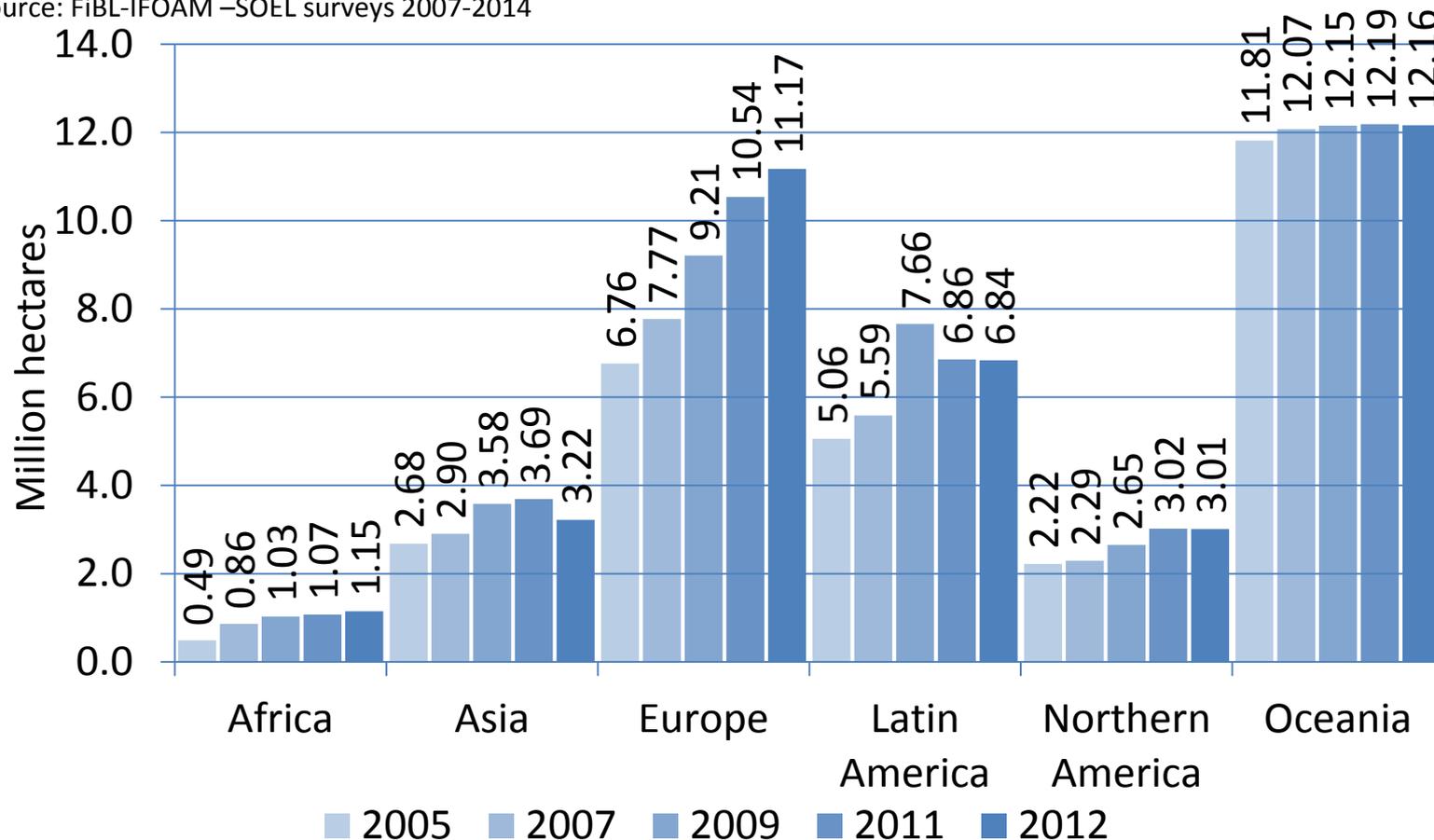
Source: FiBL-IFOAM-SOEL-Surveys 1999-2014



Growth of organic farmland by continent

Growth of the organic agricultural land by continent 2005-2012

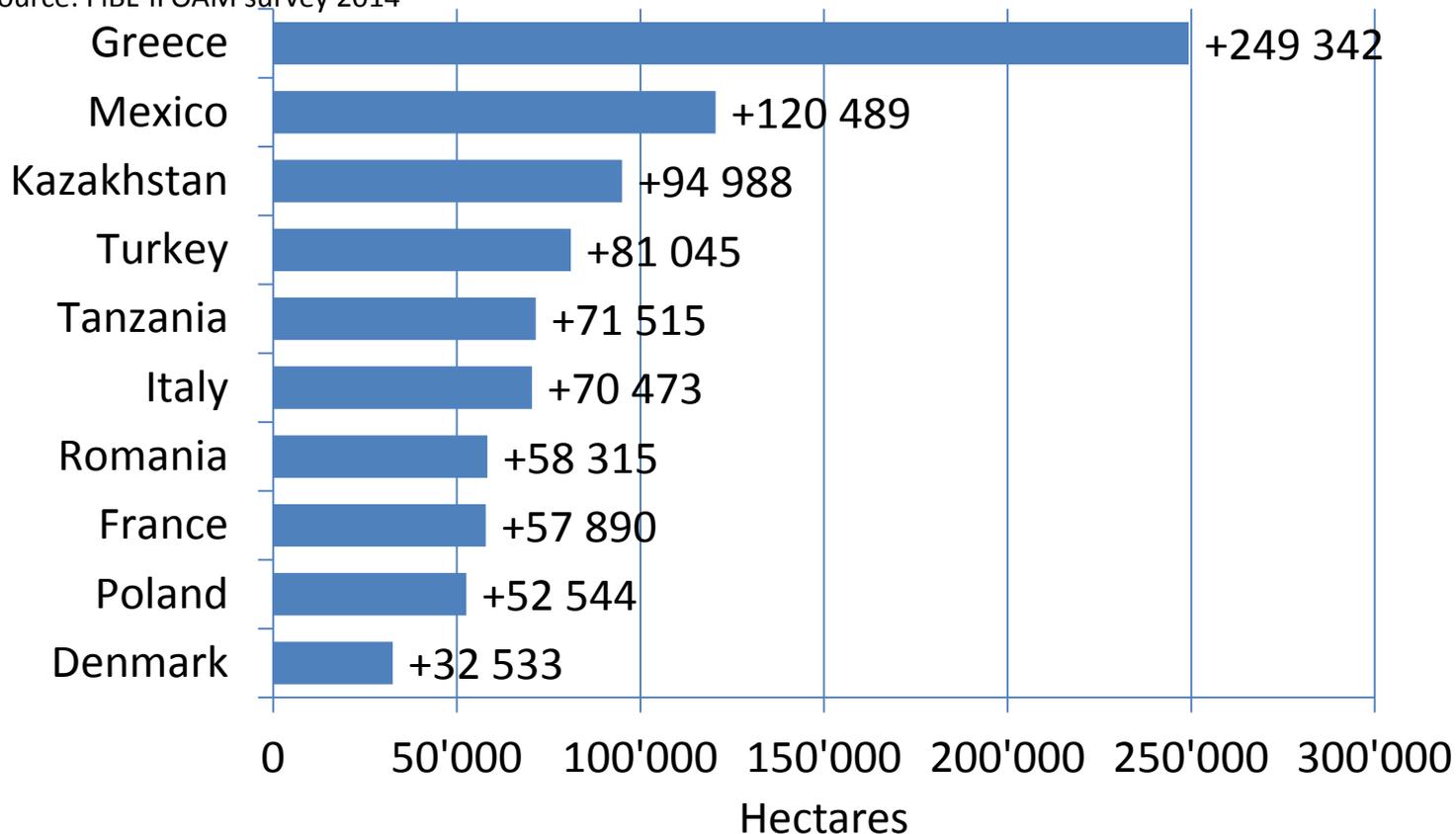
Source: FiBL-IFOAM –SOEL surveys 2007-2014



Growth of organic farmland 2011-2012

The ten countries with the highest increase of organic land 2012

Source: FiBL-IFOAM survey 2014



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 31 million hectares.
- › In total, 69 million hectares – agricultural land and other areas – were organic in 2012.

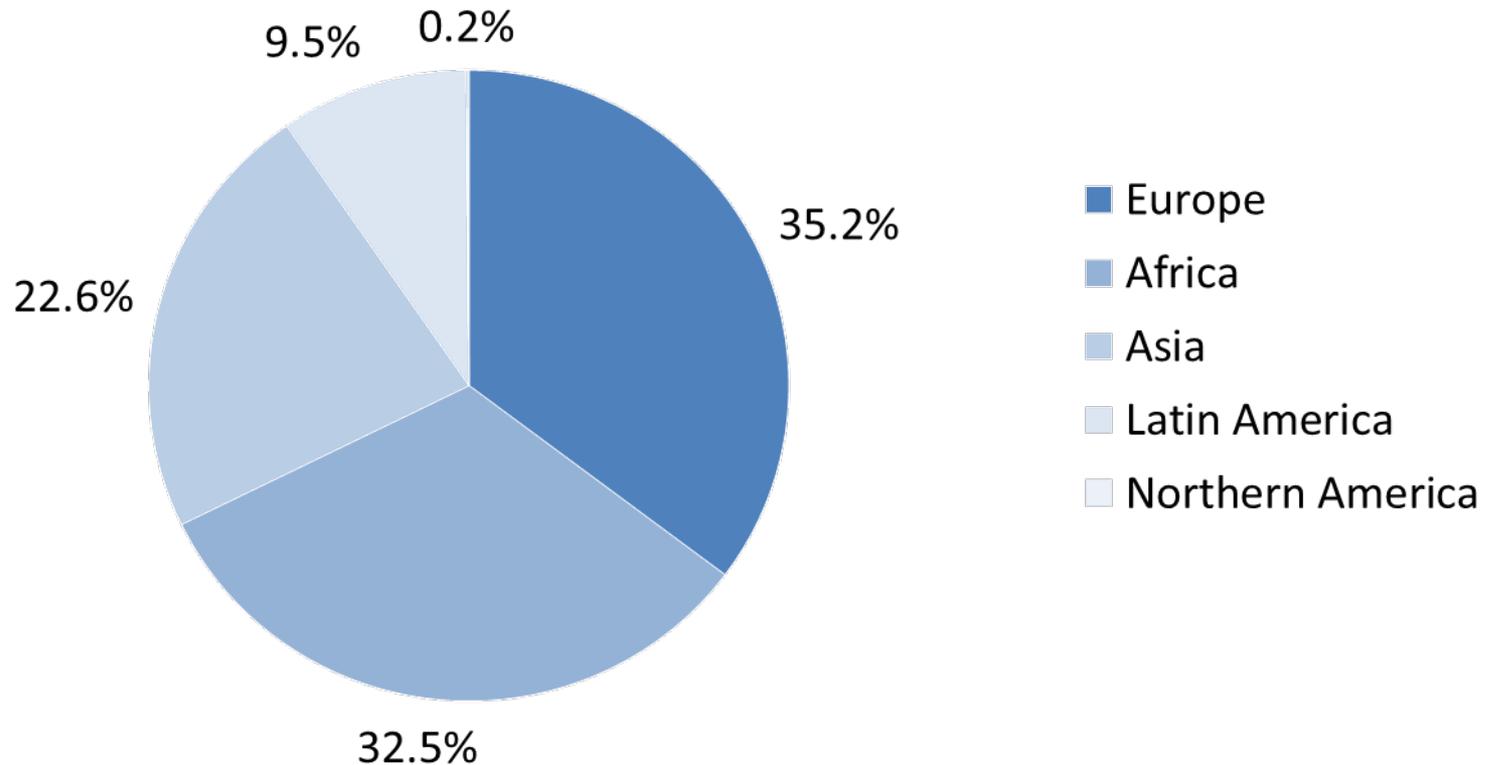
Wild collection and beekeeping areas

- › 30 million hectares of wild collection and bee-keeping areas were reported for 2012.
- › 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 2006), and wild collection activities are regulated in organic laws.

Wild collection areas by region 2012

Distribution of organic wild collection areas by region 2012

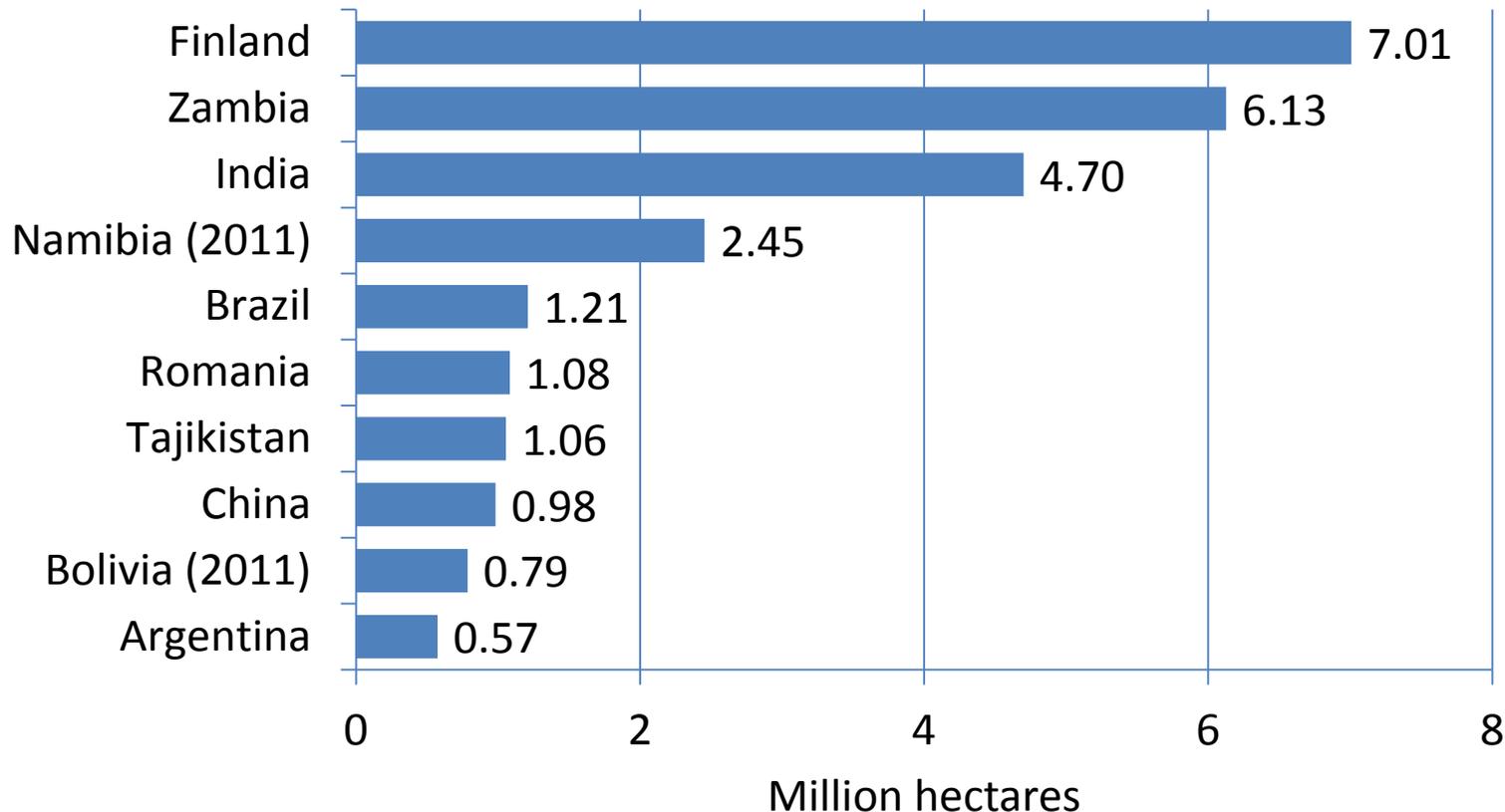
Source: FiBL-IFOAM Survey 2014



Organic wild collection 2012: Top 10 countries

The ten countries with the largest wild collection areas 2012 (including beekeeping)

Source: FiBL-IFOAM survey 2014



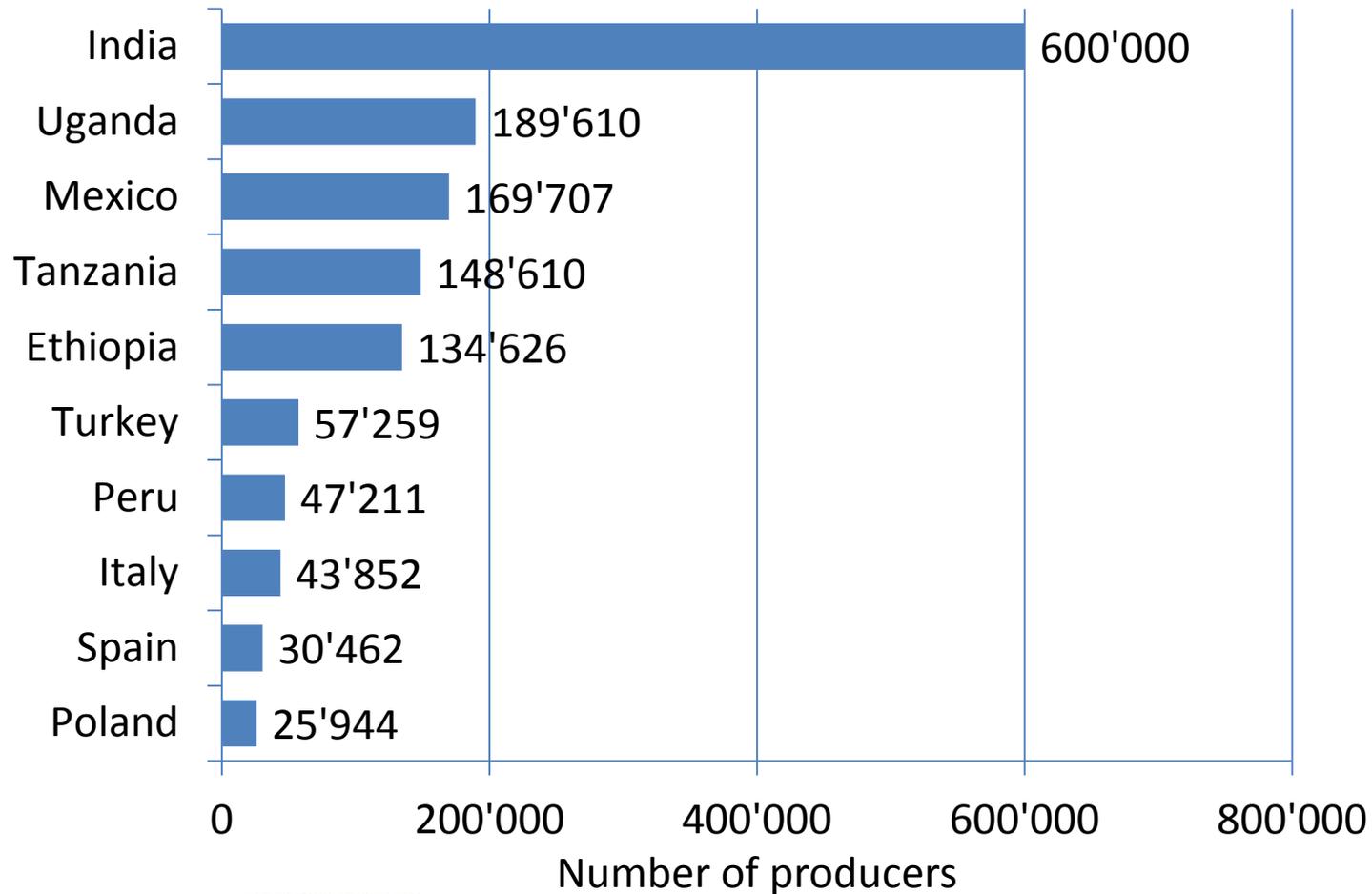
Organic producers 2012

- › For the current survey, a total of 1.9 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 (600'000), followed by Uganda (189'610) and Mexico (169'707).
- › This is an increase of more than 0.1 million producers compared with 2011, or 8 percent.
- › It should be noted that not all certifiers reported the number of producers; the number is probably higher than 1.9 million.

Organic producers 2012

The ten countries with the largest numbers of organic producers 2012

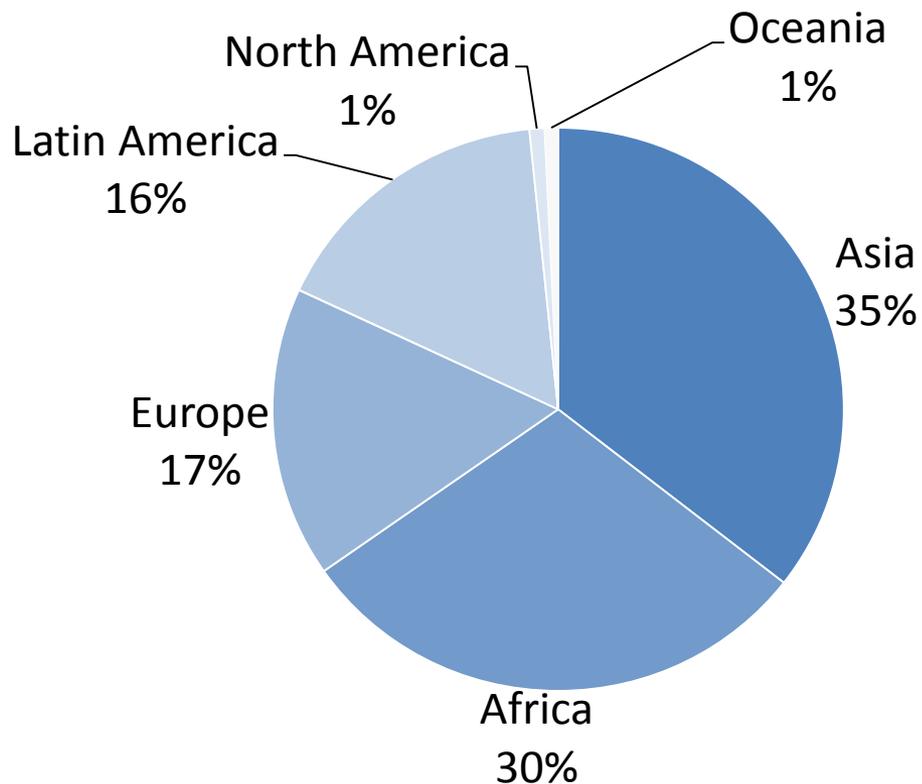
Source: FiBL-IFOAM survey 2014



Organic producers by region 2012

Organic producers by region 2012 (total: 1.9 million)

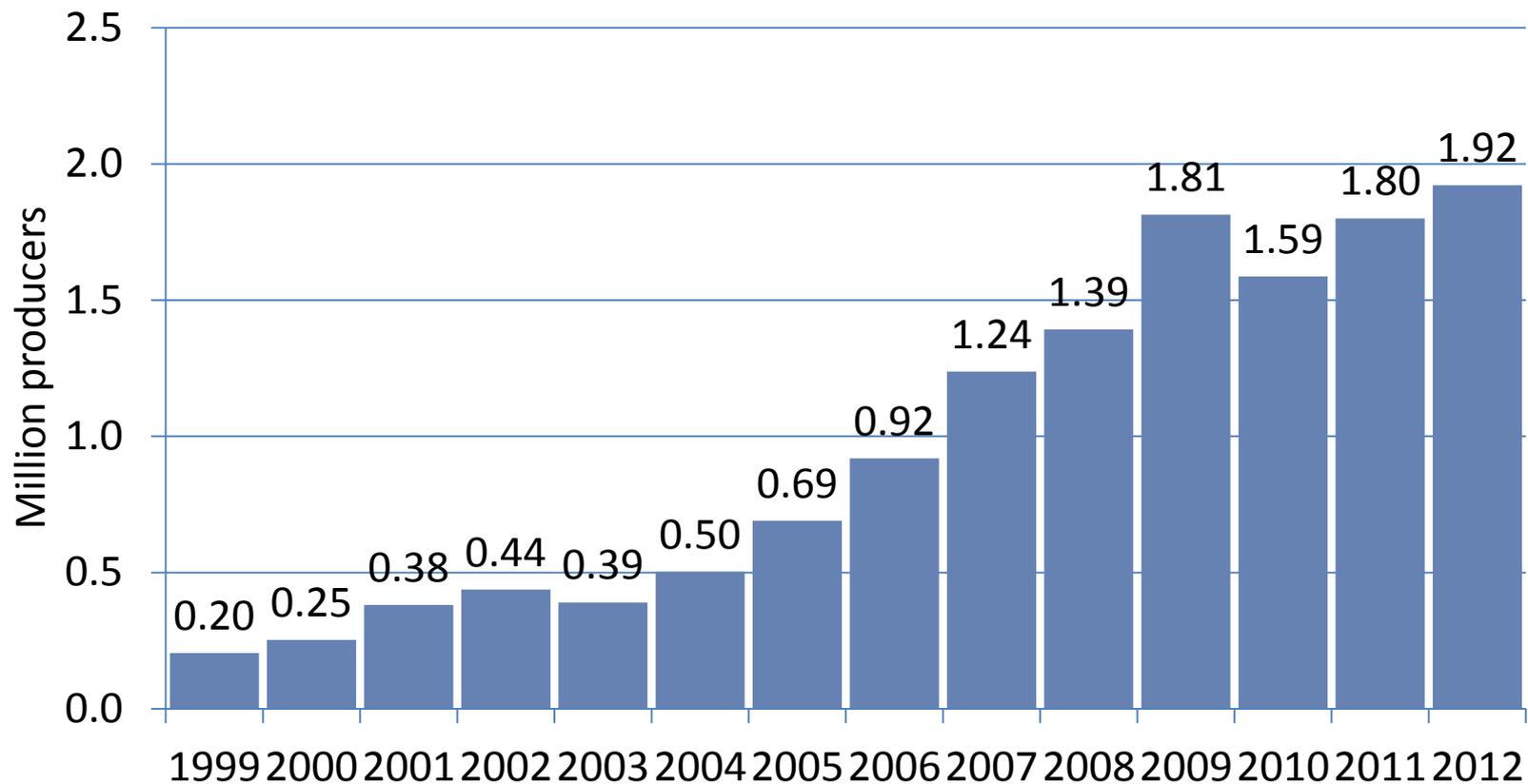
Source: FiBL-IFOAM Survey 2014



Development of organic producers 1999-2012

Development of the number of organic producers globally 1999-2012

Source: FiBL-IFOAM-SOEL-Surveys 1999-20



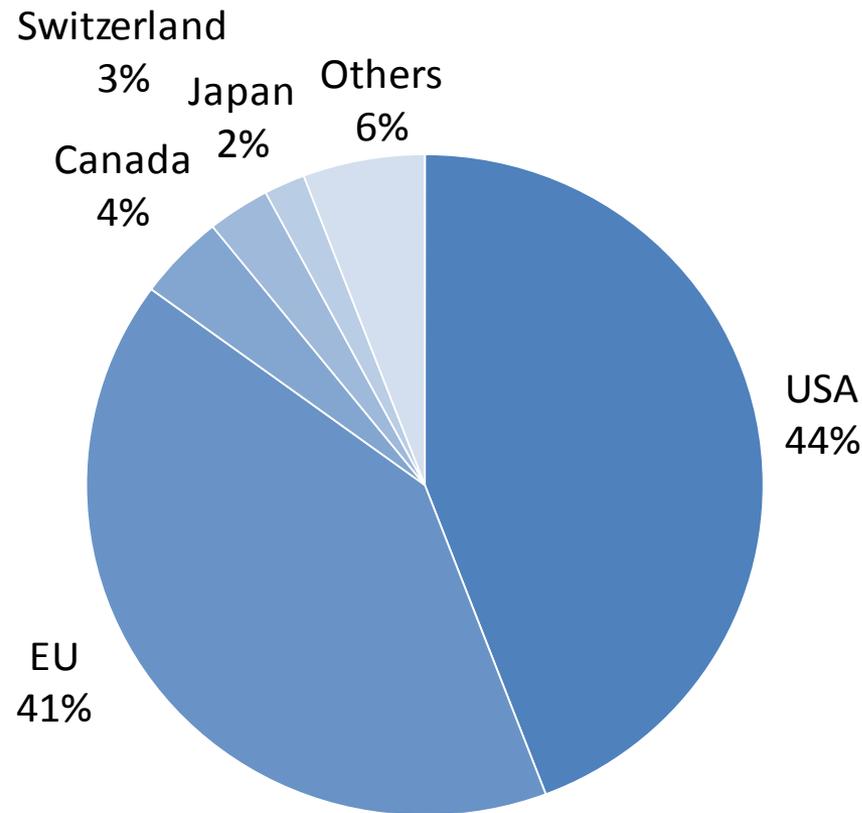
The global market for organic food and beverages 2012

- › In 2012, the global market for certified organic food and drink was estimated to be 64 billion US Dollars according to Organic Monitor (Sahota 2014).
- › The turnover with organic products has more than fourfold since 1999, when it was estimated to be 15 billion US Dollars. With the economic crisis the growth slowed down in 2008 in many countries.
- › More than ninety percent of the organic product revenues is made in the Northern hemisphere (Sahota 2014)
- › In 2012, the by far largest market was the United States with 22.6 billion euros of organic food sales, followed by Germany with 7 billion euros and France with 4 billion euros (FiBL-AMI-OrganicDataNetwork 2014).
- › The highest annual per capita consumption was in Switzerland (189 euros) and in Denmark (159 euros) (FiBL-AMI-OrganicDataNetwork 2014).
- › Denmark, Switzerland and Austria have the highest share of organic food sales. In 2012 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.

Global market: Distribution of retail sales 2012

Global organic market: Distribution of retail sales value by single markets 2012

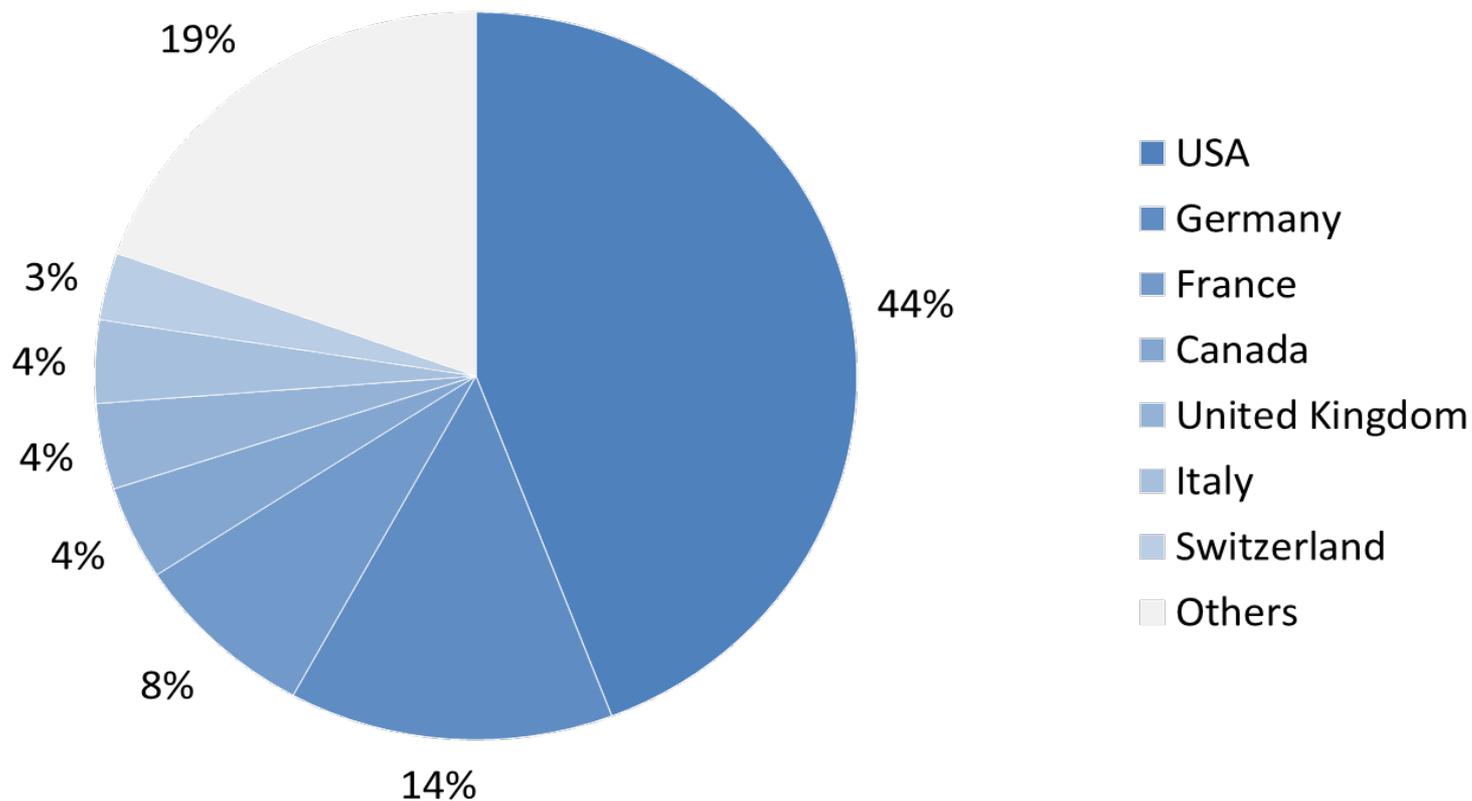
Source: FiBL-AMI-OrganicDataNetwork survey 2014



Distribution of organic retail sales 2012

Global market: Distribution of retail sales value by country

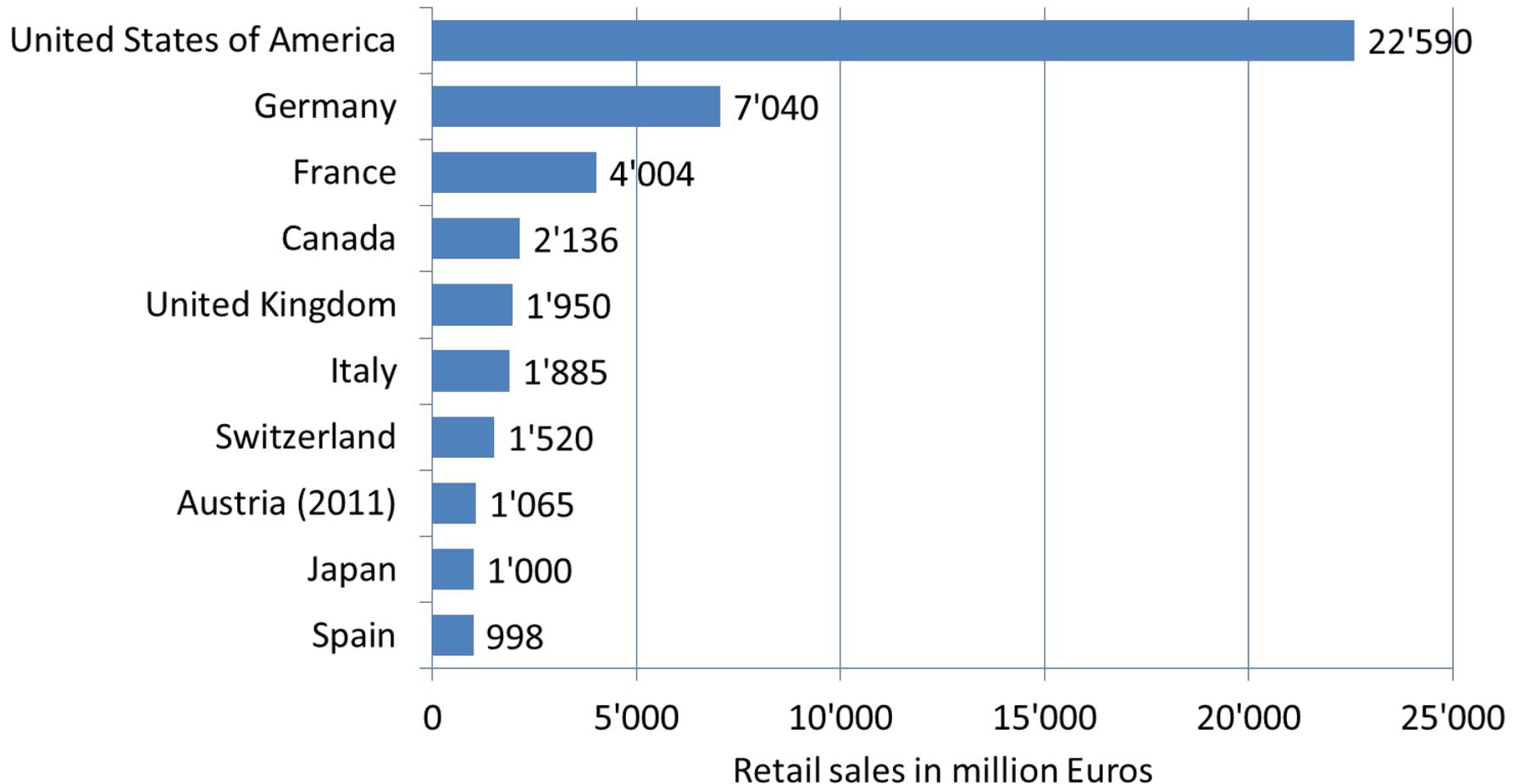
Source: FiBL-AMI-OrganicDataNetwork survey 2014, based on retail sales with organic food



The largest markets for organic food 2012

The ten countries with the largest markets for organic food 2012

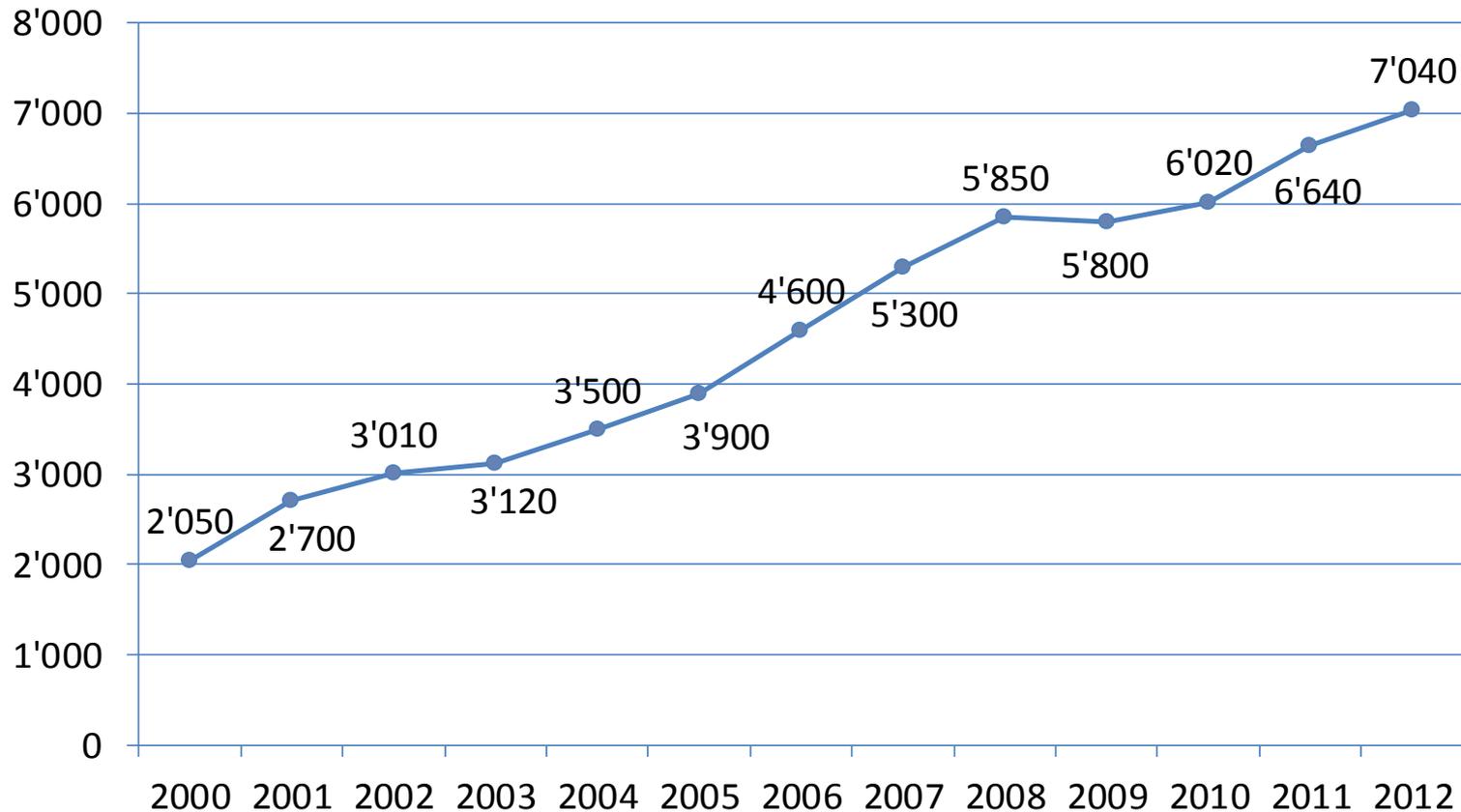
Source: FiBL-AMI-OrganicDataNetwork survey 2014



Growth of retail sales in Germany 2000-2012

Growth of retail sales with organic food and beverages in Germany 2000-2012

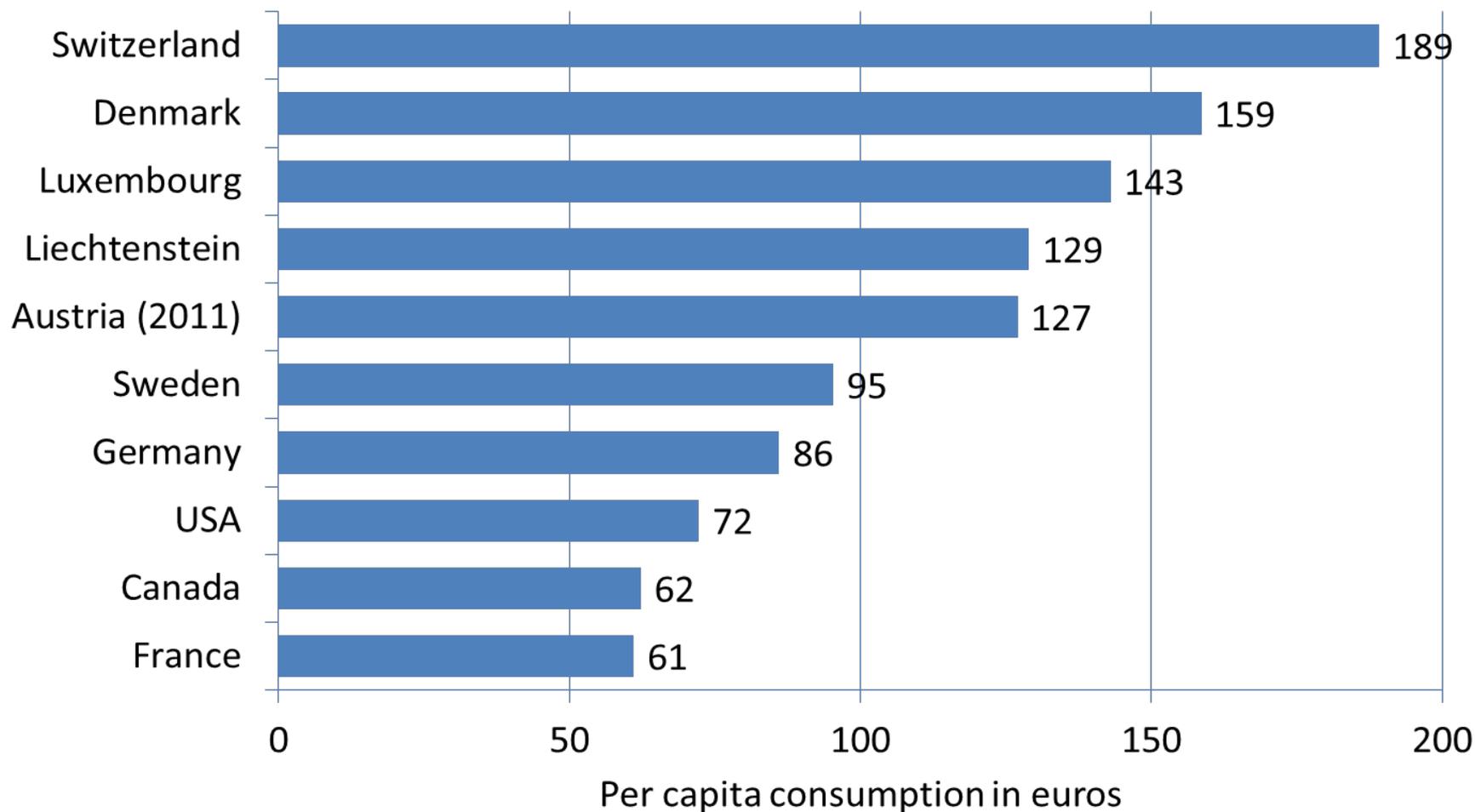
Source: FiBL-AMI surveys 2000-2014



Per capita consumption 2012

The ten countries with the highest per capita consumption 2012

Source: FiBL-AMI-OrganicDataNetwork survey 2014



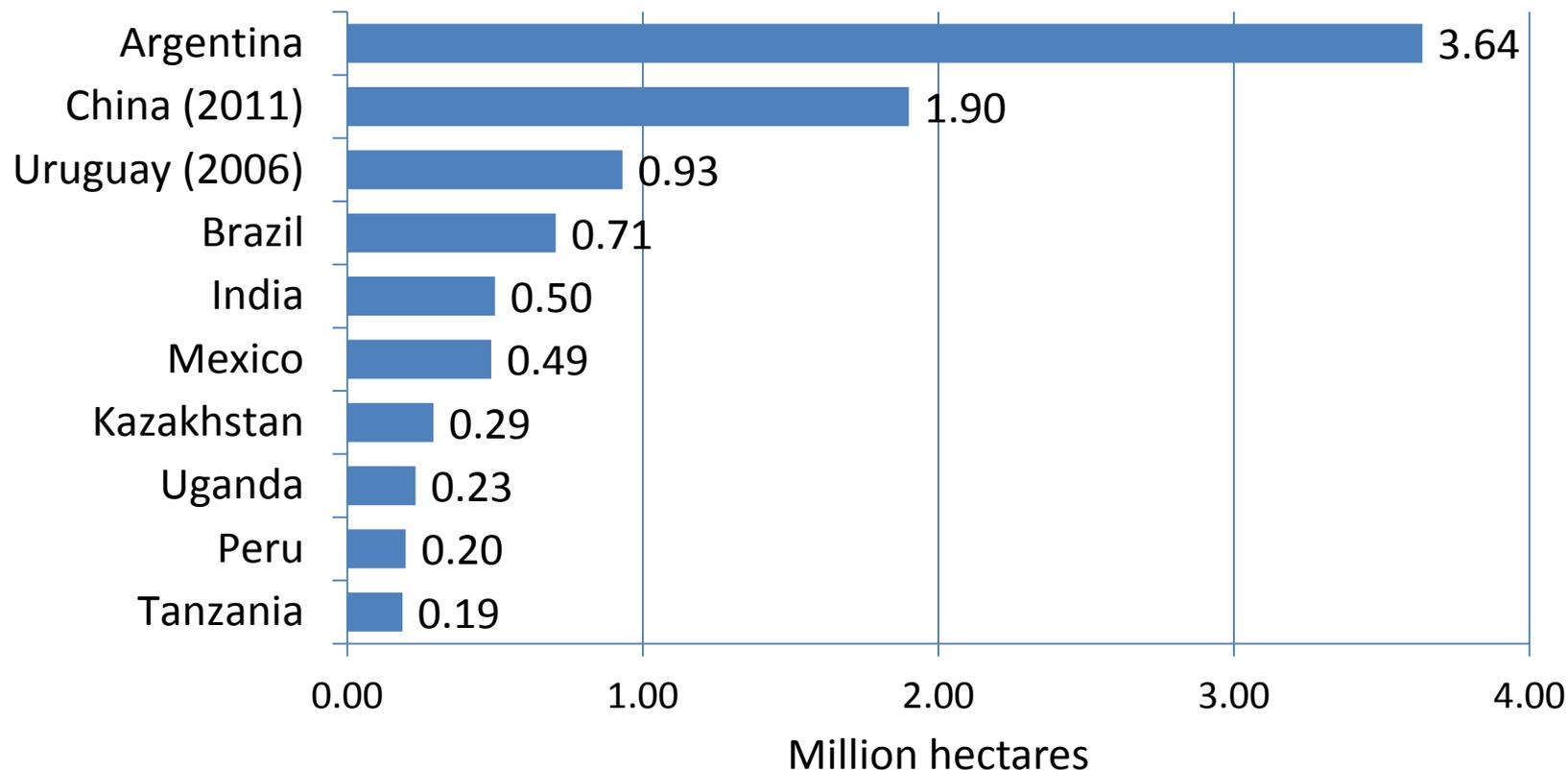
Organic farming in developing & transition countries 2012

- › About one third of the world's organic agricultural land – 11.3 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.
- › 1.5 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 http://www.studyinsweden.se/upload/studyinsweden_se/Documents/DAC-countries.pdf

DAC list: The top 10 countries 2012 (area)

The ten countries on the DAC list with the largest areas of organic agricultural land 2012

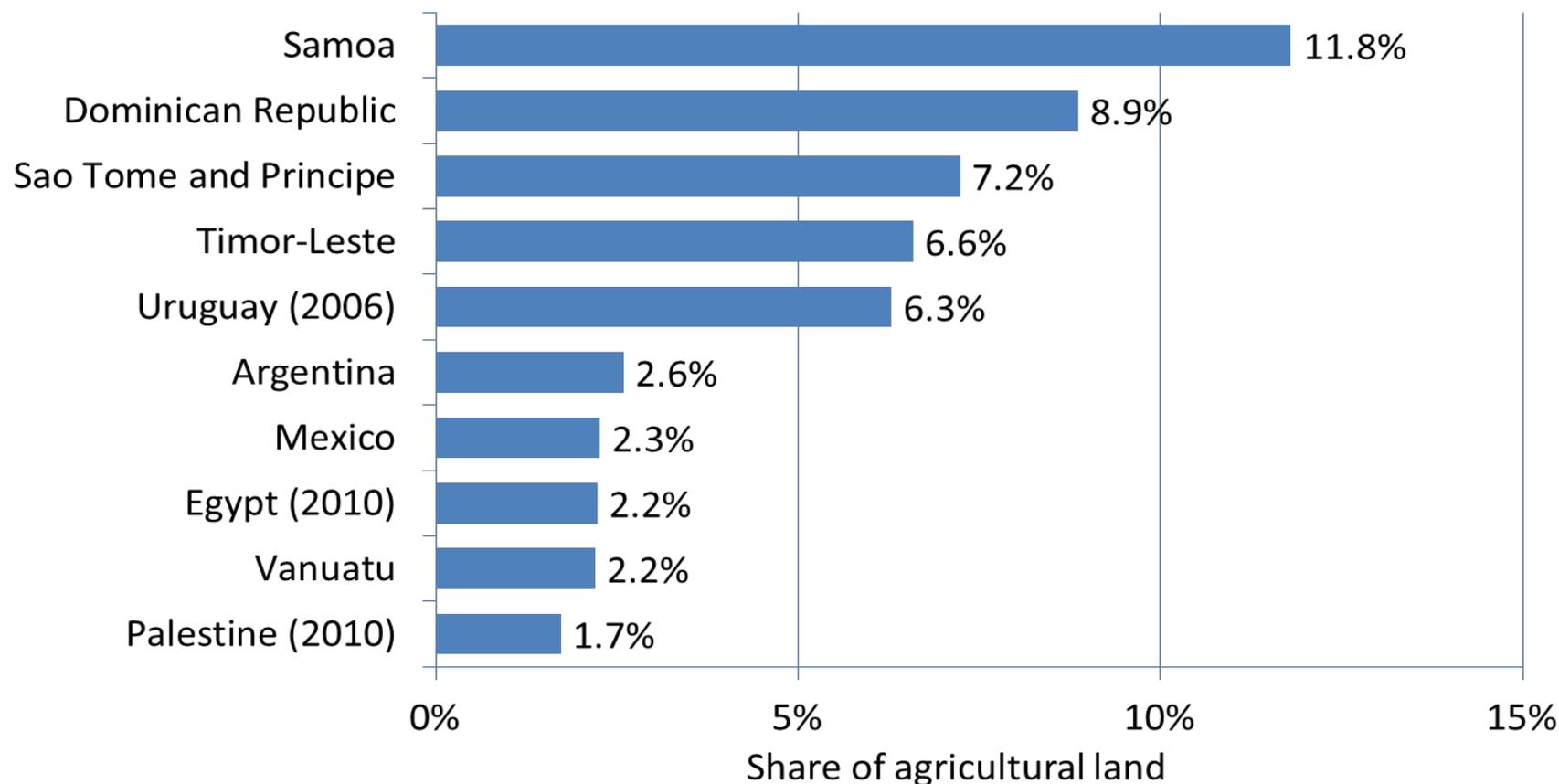
Source: FiBL-IFOAM survey 2014



DAC list: The top 10 countries 2012 (organic shares)

The ten countries on the DAC list with the highest shares of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014



More information

- › More information (PDF, data sources, graphs) at <http://www.organic-world.net/yearbook-2014.html>
- › Contact
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