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Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2014 Part 3: Organic agriculture in the regions 2012

Julia Lernoud and Helga Willer
Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, April 2014

Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2014: Part 3: Organic agriculture in the regions 2012

- › 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
- › This Präsentation ist available online at: <http://www.organic-world.net/yearbook-2014-presentations.html>
- › Texts and graphs: Helga Willer and Julia Lernoud; Research Institute of Organic Agriculture, FiBL, Frick, Switzerland
- › Contact: Helga Willer, Research Institute of Organic Agriculture, FiBL, Frick, Switzerland, helga.willer@fibl.org
- › © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2014

Acknowledgements*

- › 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 OrganicData network project
- › 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2014.

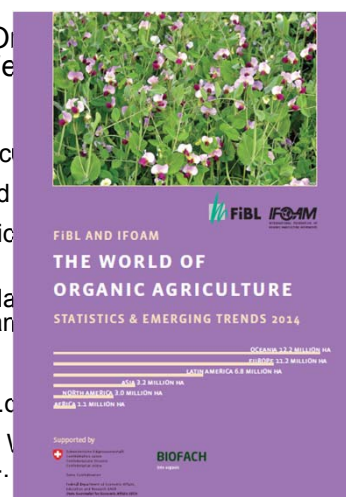


* See also disclaimer on last page of this slide show



The World of Organic Agriculture 2014

- › The 15th edition of 'The World of Organic Agriculture' published by FiBL and IFOAM in February 2014.
- › Contents:
 - › Results of the survey on organic agriculture in 2013.
 - › Organic agriculture in the regions and countries: Africa, Asia, Europe, Latin America and The United States of America.
 - › Chapters on the global market, standards, PGS, European market and organic certification.
 - › Numerous tables and graphs.
 - › The book can be ordered via IFOAM.org
 - › *Willer, H, Lernoud, J, (2014) The World of Organic Agriculture: Statistics and Emerging Trends 2014.



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, there are navigation links for Home, About, Statistics, News, and Contact. Below this, there is a list of editions from 2007 to 2013. A search bar is located in the middle. On the right, there is a featured article titled 'The World of Organic Agriculture 2013' with a small image of a field. The article text mentions that the 14th edition will be launched at BioFach 2013 in Stuttgart, Germany, and provides details about the content, including global organic farming statistics and country reports.

About this presentation

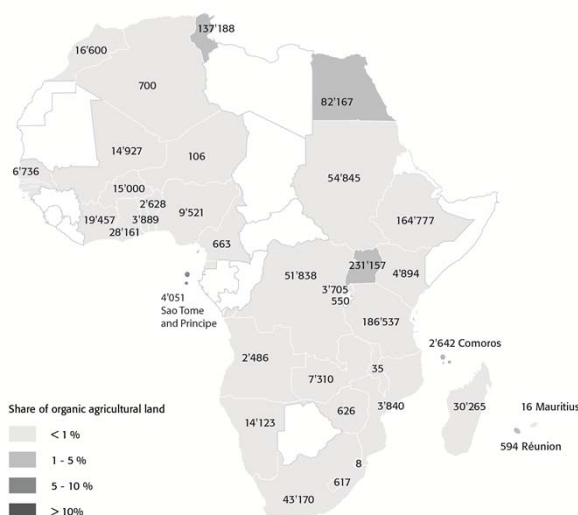
- › There are 3 presentations summarizing the key results of the FiBL-IFOAM survey on organic agriculture worldwide 2014 (data 2012). Apart from the global data, key results on crop and on regional data are presented.
- › More information is available at the password area of www.organic-world.net
- › The following three presentations are available at <http://www.organic-world.net/yearbook-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 15th 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.



Africa: Organic agricultural land by country 2012



Source: FiBL-IFOAM Survey 2014

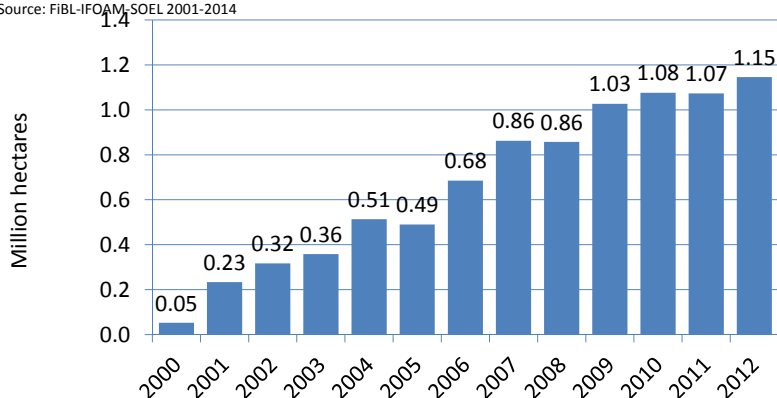
Organic agriculture in Africa 2012

- › In Africa, there were 1.1 million hectares of certified organic agricultural land (data 2012).
- › This constitutes about three percent of the world's organic agricultural land.
- › Almost 580'000 producers were reported.
- › The countries with the most organic land are Uganda (231'157 hectares), Tanzania (186'537 hectares), and Ethiopia (164'777 hectares).
- › The highest shares of organic land are in Sao Tome and Principe (7.2 percent), Egypt (2.2 percent), and Comoros (1.7 percent).
- › The majority of certified organic produce in Africa is destined for export markets.
- › The European Union, as the major recipient of these exports, is Africa's largest market for agricultural produce.

Africa: Development of organic agricultural land 2000-2012

Africa: Development of organic agricultural land 2000 to 2012

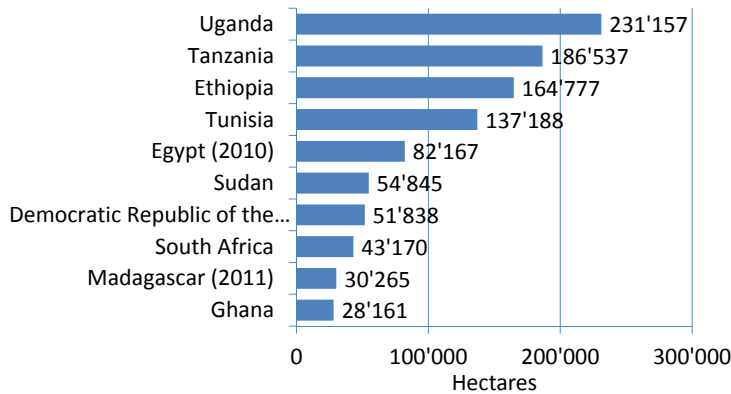
Source: FiBL-IFOAM, SOEL 2001-2014



Africa: The ten countries with the most organic agricultural land 2012

Africa: The ten countries with the largest organic area 2012

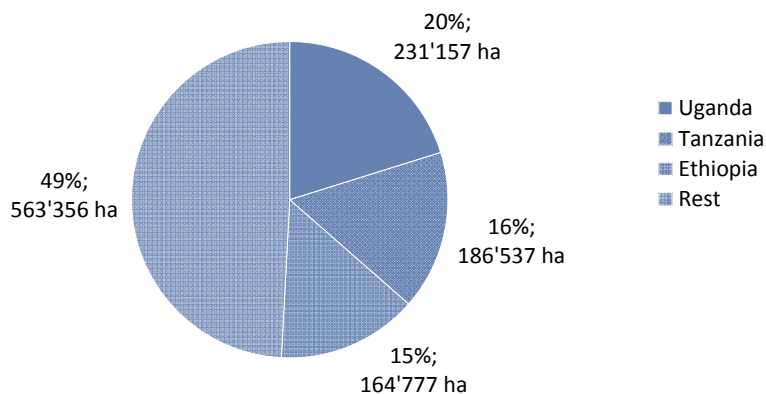
Source: FiBL-IFOAM survey 2014



Africa: Distribution of organically managed agricultural land by country

Africa: Distribution of organically managed agricultural land by country 2012

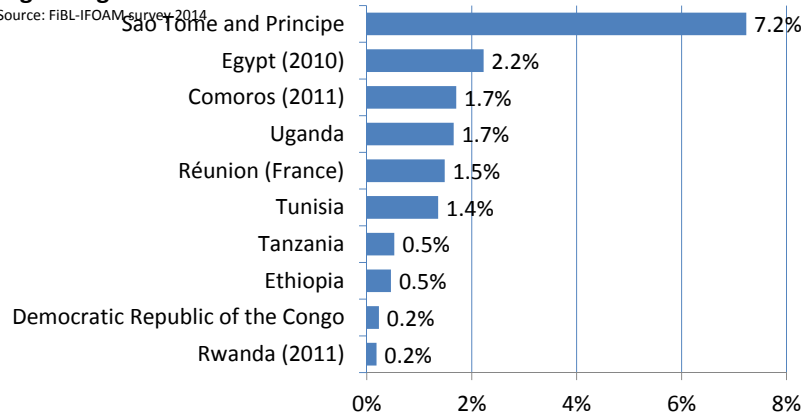
Source: FiBL-IFOAM survey 2014



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

Africa: The countries with the highest share of organic agricultural land 2012

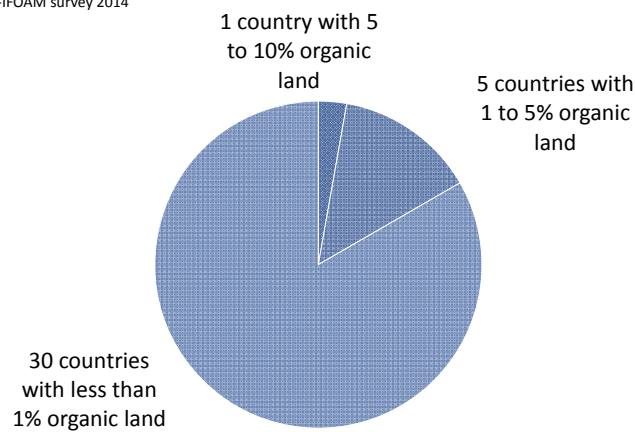
Source: FiBL-IFOAM survey 2014

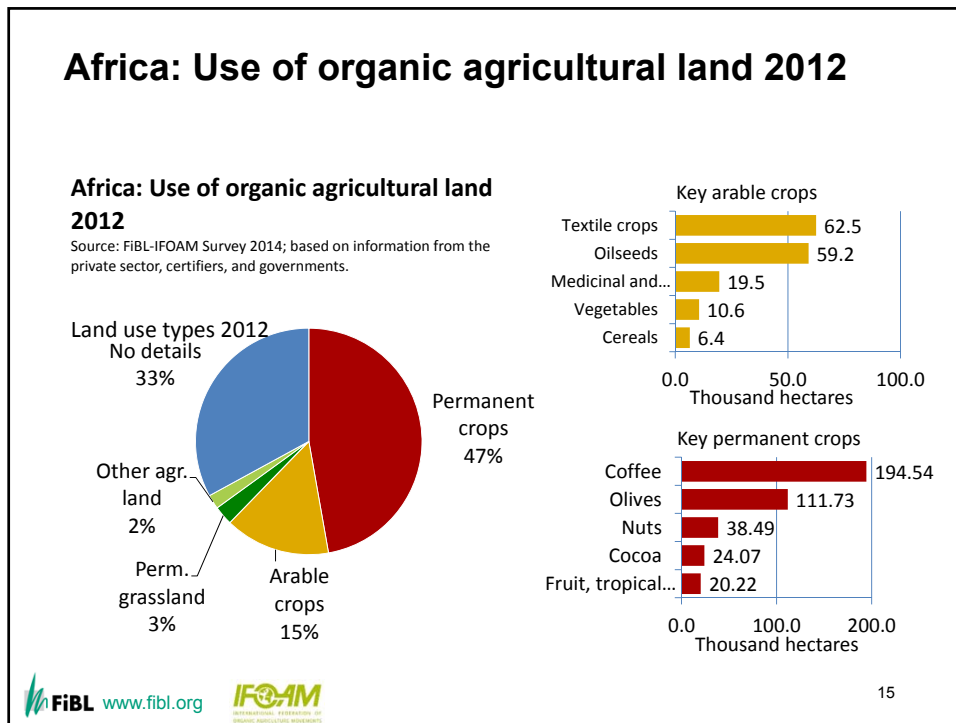


Africa: Distribution of shares of organic land 2012

Africa: Distribution of shares of organic land 2012

Source: FiBL-IFOAM survey 2014





Articles about Africa in the 2014 edition of "The World of Organic Agriculture"

- › Latest Developments in Organic Farming in Africa, Hervé Bouagnimbeck and Jordan Gama

www.fibl.org
INTERNATIONAL FEDERATION OF ORGANIC AGRICULTURE MOVEMENTS

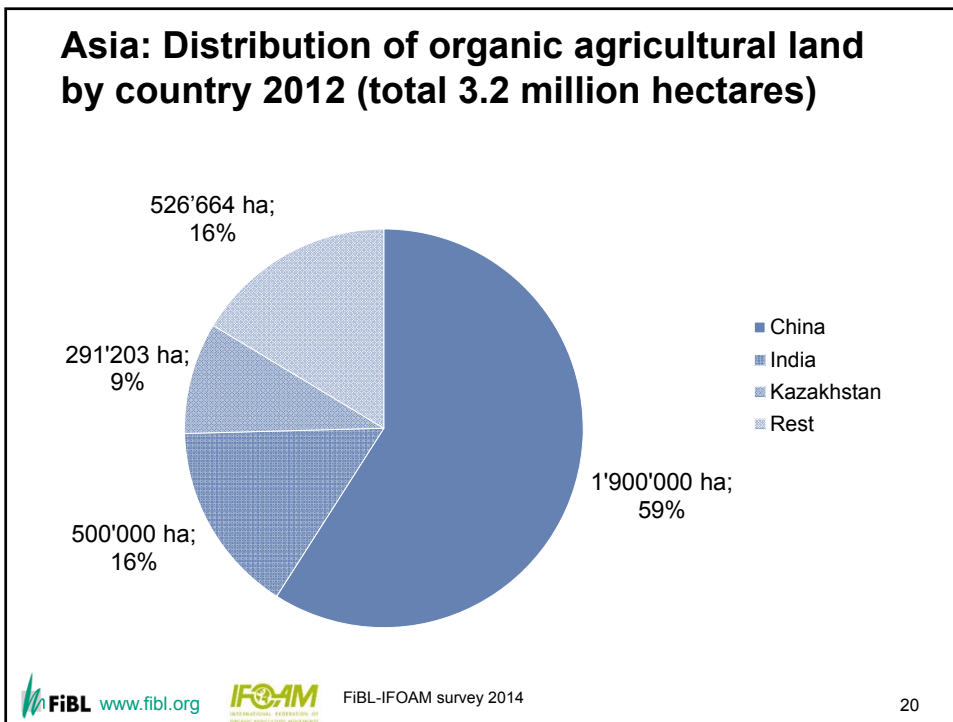
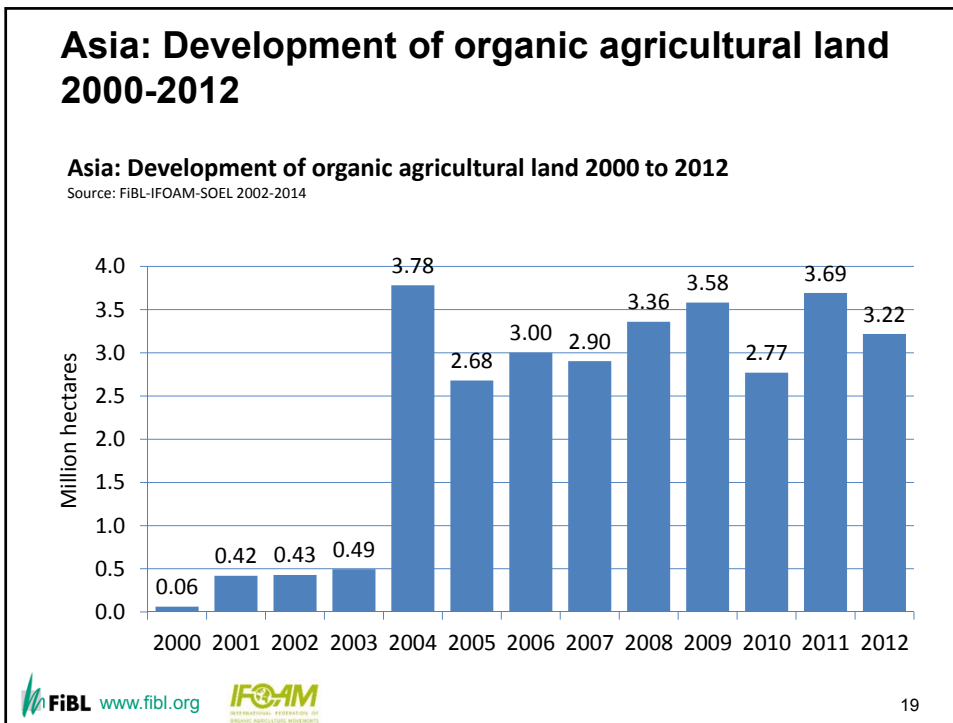
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Asia: Organic agricultural land by country 2012



Organic Agriculture in Asia – Key Figures 2012

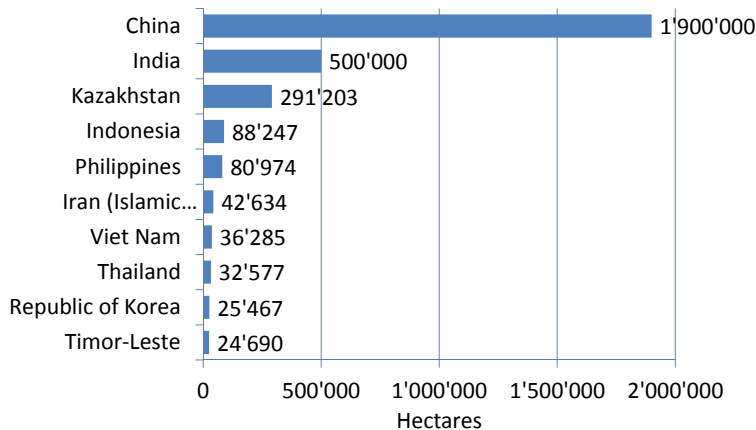
- › The total organic agricultural area in Asia was 3.2 million hectares in 2012.
- › This constitutes nine percent of the world's organic agricultural land.
- › There were more than 0.6 million producers reported.
- › The leading countries by organic agricultural land are China (1.9 million hectares) and India (0.5 million hectares).
- › Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent).



Asia: The ten countries with the most organic agricultural land 2012

Asia: The ten countries with the largest organic area 2012

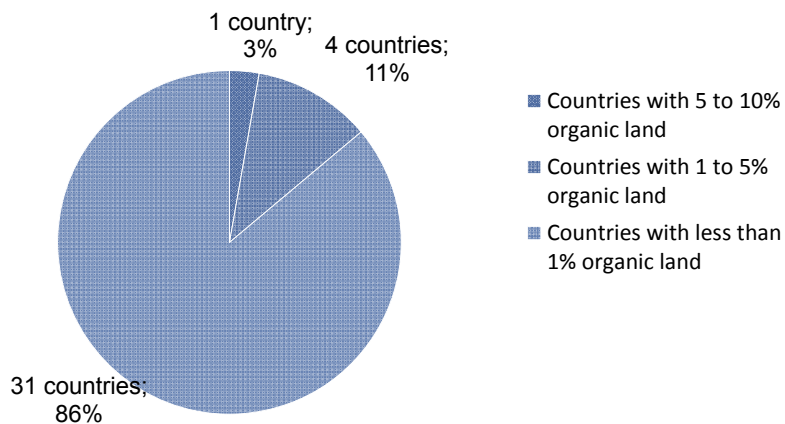
Source: FiBL-IFOAM survey 2014

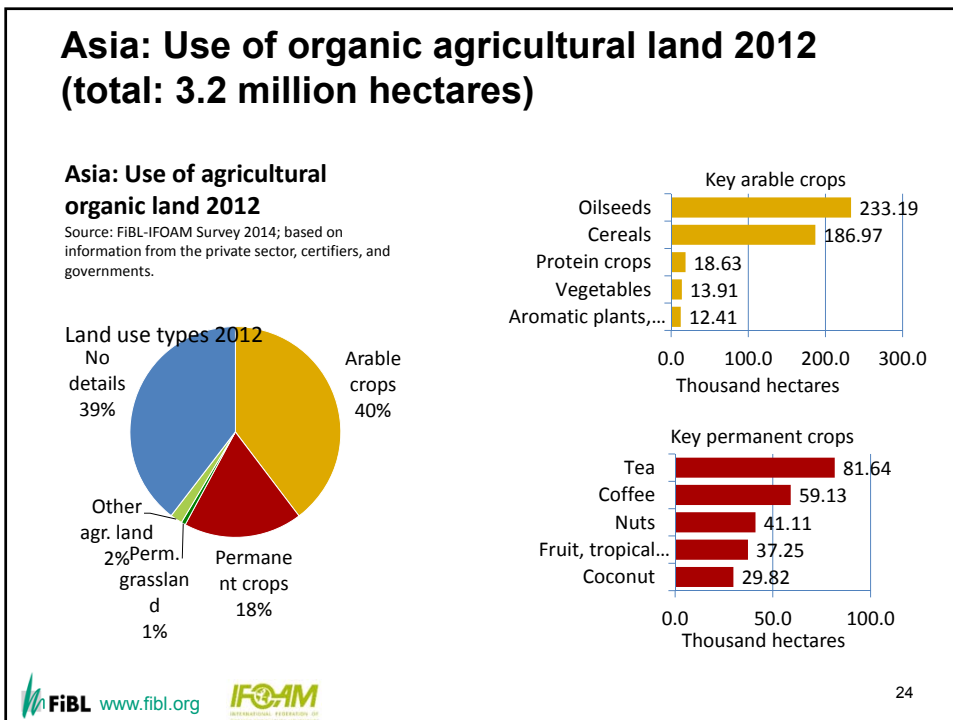
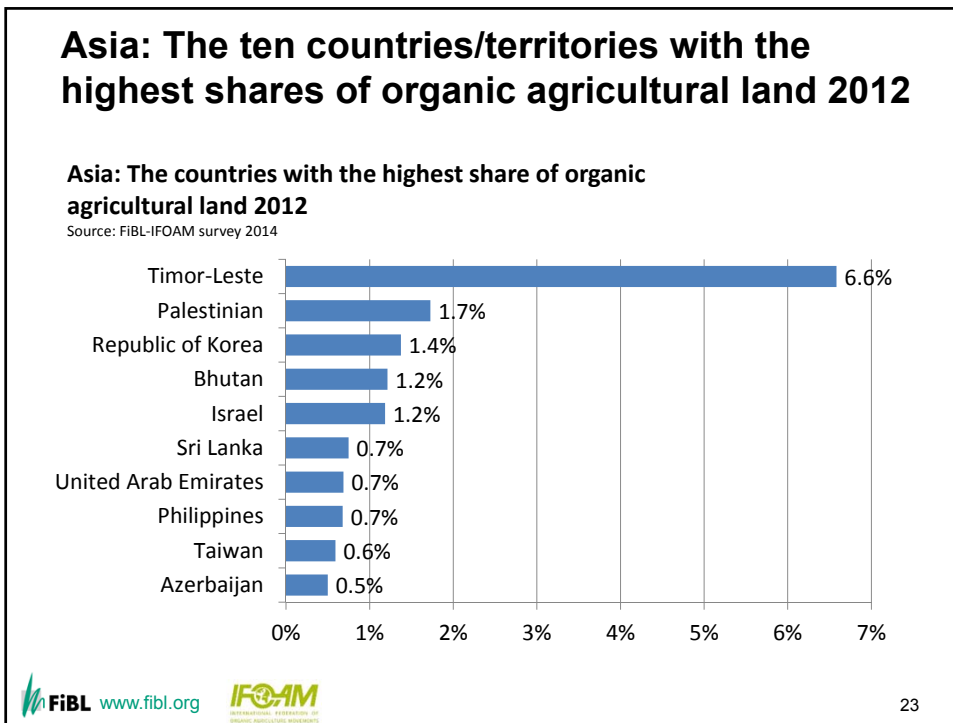


Asia: Distribution of shares of organic land 2012

Asia: Distribution of shares of organic land 2012

Source: FiBL-IFOAM survey 2014





Articles about Asia in the 2014 Edition of "The World of Organic Agriculture"

- › Developments in Asia
Ong Kung Wai
- › Organic Farming in Bangladesh
Mitul Kumar Saha and S. M. Monowar Hossain
- › China: Organic Tea Production Development and Market Trends
Yuhui Qiao
- › The Organic Farming Sector of the United Arab Emirates
Saif Mohamed AlSara

Europe: Organic agricultural land by country 2012



Organic agriculture in Europe: Key data/indicators 2012

- › 11.2 million hectares of agricultural land are organic (including in conversion areas).
- › This constitutes 2.3 percent of the agricultural land in Europe.
- › The organic agricultural land increased by 0.63 million hectares or six percent in 2012 .
- › Almost 320'000 producers were reported.

Organic agriculture in the European Union: Key data/indicators 2012

- › 10 million hectares of agricultural land are organic (including in conversion areas).
- › This constitutes 5.6 percent of the agricultural land in the European Union.
- › The organic agricultural land increased by 0.54 million hectares or six percent in 2012.
- › Almost 250'000 producers were reported.

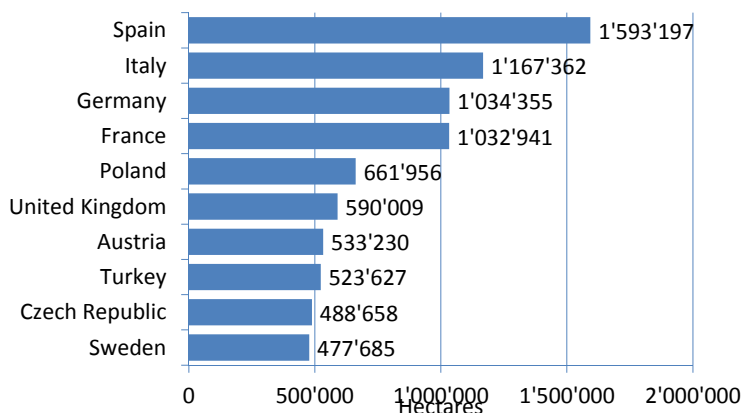
Organic market in Europe: Key data/indicators 2012

- › The European market was 22.8 billion euros; six percent more than in 2011.
- › The largest market for organic products in 2012 was Germany with a turnover of 7 billion euros, followed by France (4 billion euros) and the UK (1.95 billion euros).
- › As a portion of the total market share, the highest levels have been reached in Denmark, Austria and Switzerland, with six percent or more for organic products. The highest per capita spending is also in these countries and in Luxembourg.

Europe: The ten countries with the most organic agricultural land 2012

Europe: The ten countries with the largest organic area 2012

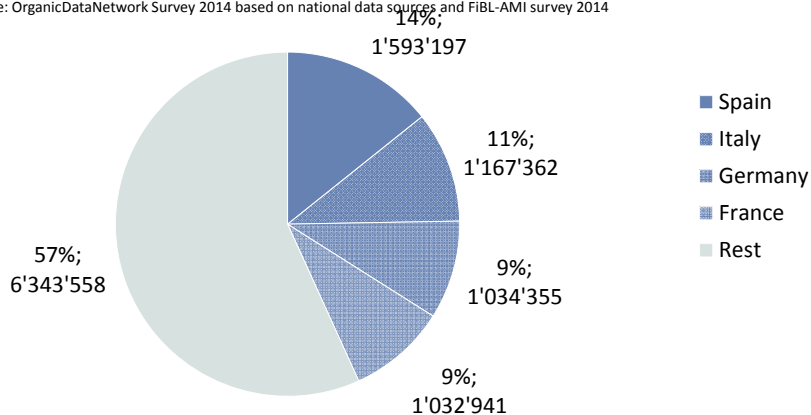
Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014



Europe: Distribution of organically managed agricultural land by country 201

Europe: Distribution of organically managed agricultural land by country 2012 (Total: 11.2 million hectares)

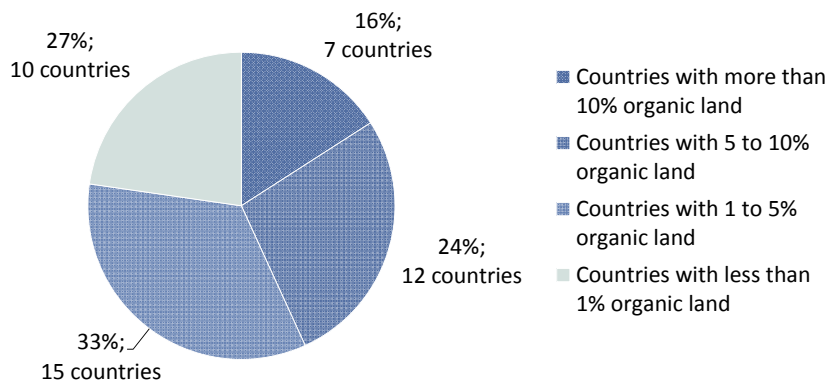
Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014



Europe: Distribution of shares of organic land 2012

Europe: Distribution of shares of organic land 2012

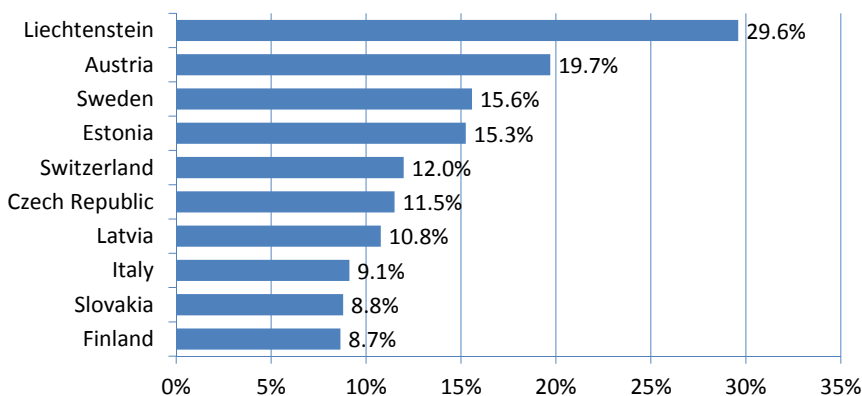
Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014



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

Europe: The countries with the highest share of organic agricultural land 2012

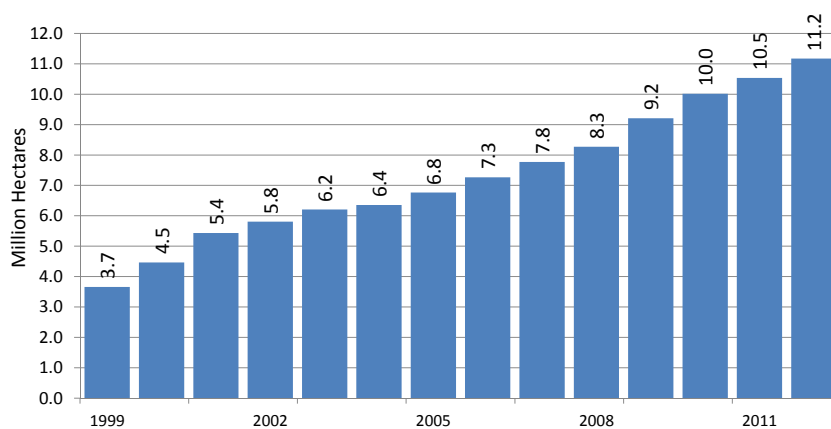
Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014



Development of the organic agricultural land in Europe 1985-2012

Europe: Development of organic agricultural land 1985-2012

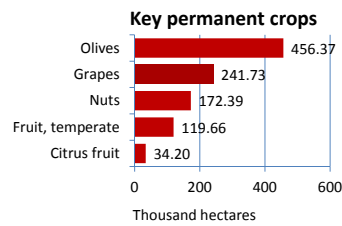
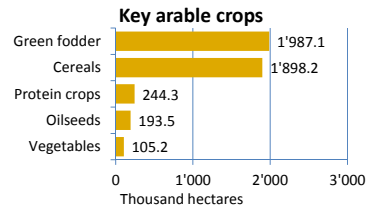
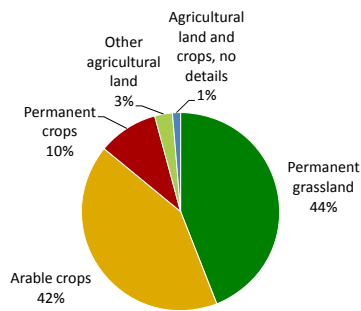
Source: FiBL-IFOAM-SOEL surveys 2000-2012



Europe: Use of organic agricultural land 2012 (total: 11.2 million hectares)

Europe: Use of organic farmland 2012

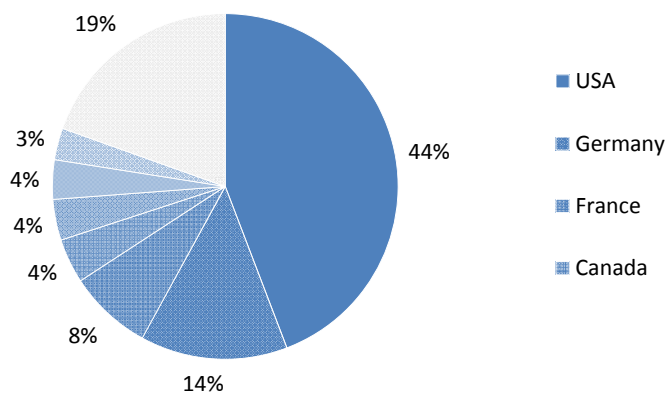
Source: Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014

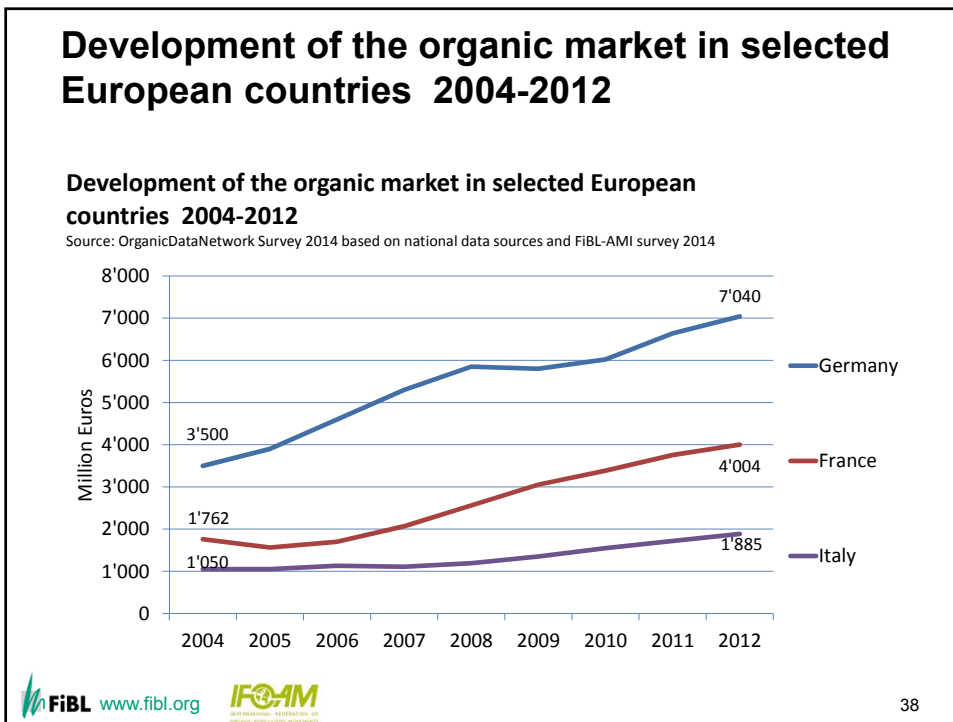
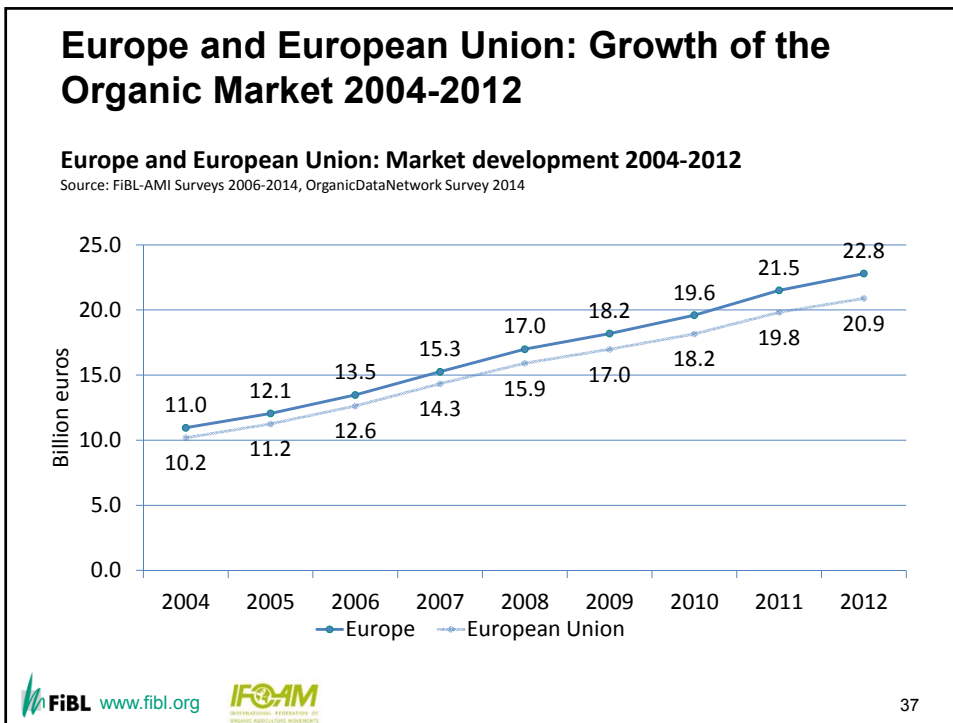


Distribution of organic retail sales by country worldwide 2012

Global market: Distribution of retail sales value by country

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

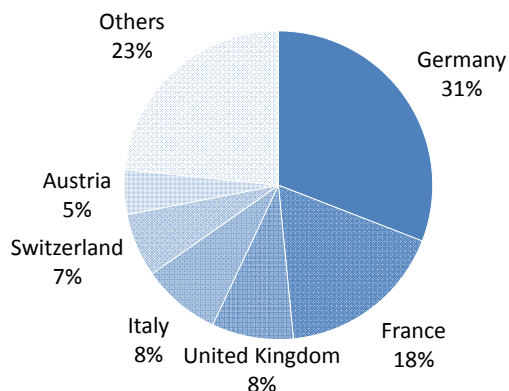




Europe: Distribution of sales of organic food and drink by country 2012 (total: 22.8 billion euros)

Europe: Distribution of organic retail sales 2012 (total sales: 22.8 billion euros)

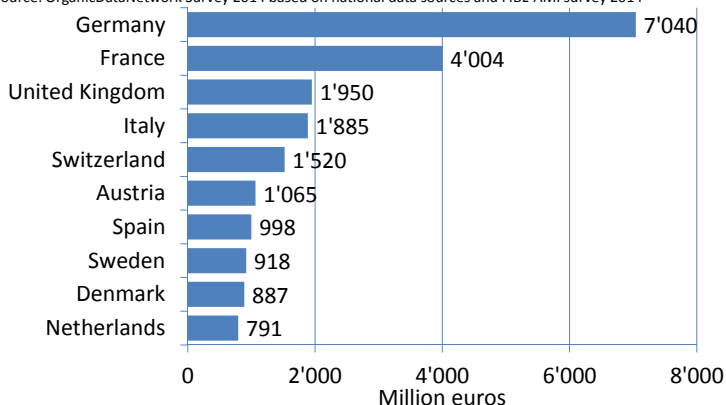
Source: FiBL-AMI Survey 2014



The European market for organic food and drink: The countries with the highest sales 2012

Europe: The ten countries with the largest markets for organic food and beverages 2012

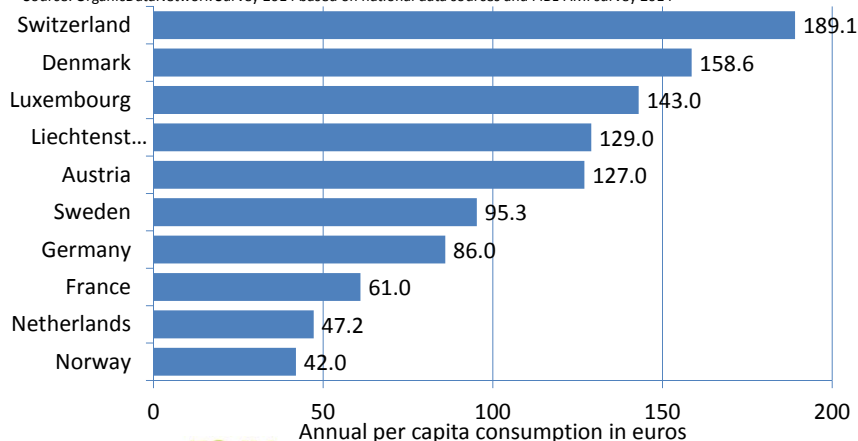
Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014



The European market for organic food: The countries with the highest per capita consumption 2012

Europe: The ten countries with the highest per-capita consumption 2012

Source: OrganicDataNetwork Survey 2014 based on national data sources and FiBL-AMI survey 2014



Articles about Europe in the 2014 Edition of "The World of Organic Agriculture"

- › Organic Farming in Europe
Helga Willer
- › The Organic Market in Europe 2012
Diana Schaack, Julia Lernoud, Helga Willer, and
Susanne Padel
- › OrganicDataNetwork Statement on Data Collection and
EU Regulation
- › Organic Farming in Croatia
Darko Znaor

Latin America/Caribbean: Organic agricultural land by country 2012



Latin America: Key figures 2012

- › In Latin America, more than 300'000 producers managed 6.8 million hectares of agricultural land organically in 2012.
- › This constitutes 18 percent of the world's organic land and 1.1 percent of the regions agricultural land.
- › The leading countries are Argentina (3.6 million hectares), Uruguay (0.93 million hectares), and Brazil (0.7 million hectares).
- › The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (36.3 percent), French Guiana (10.6 percent), and the Dominican Republic (8.7 percent).

Latin America: Key figures 2012

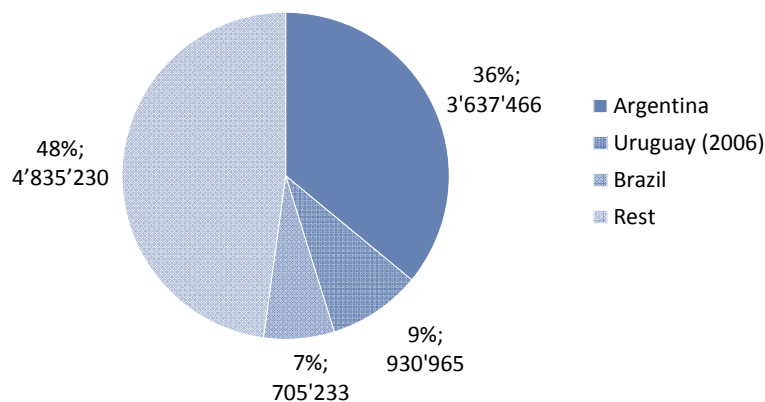
- › Most organic products from Latin American countries are sold on the European, North American or Japanese markets. Popular goods are especially those that cannot be produced in these regions, as well as off-season products.
- › Thus, the development of robust local markets is still a major challenge, without which the sustainability of organic production cannot be achieved. Important crops are tropical fruits, grains and cereals, coffee, cocoa, sugar, and meats. Most organic food sales in the domestic markets of the countries occur in major cities.
- › Twenty-two countries have legislation on organic farming, and two additional countries are currently developing organic regulations. Costa Rica and Argentina have both attained Third Country status according to the EU regulation on organic farming.



Latin America/Caribbean: Distribution of organic agricultural land by country 2012

Latin America/Caribbean: Distribution of organic agricultural land by country 2012 (total: 6.8 million hectares)

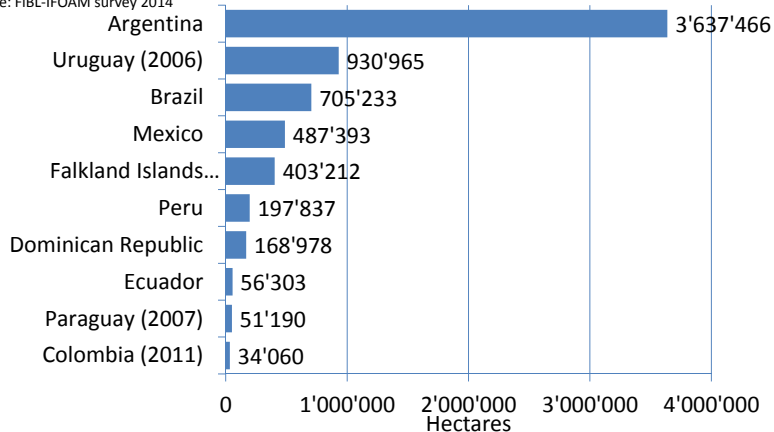
Source: FiBL-IFOAM survey 2014



Latin America and Caribbean: The ten countries with the largest organic areas 2012

Latin America and Caribbean: The ten countries with the largest organic area 2012

Source: FiBL-IFOAM survey 2014

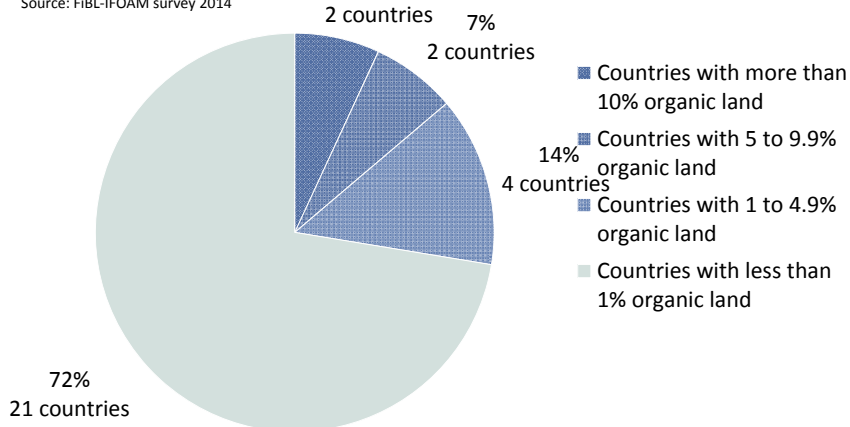


47

Latin America: Distribution of shares of organic land 2012

Latin America: Distribution of shares of organic land 2012

Source: FiBL-IFOAM survey 2014

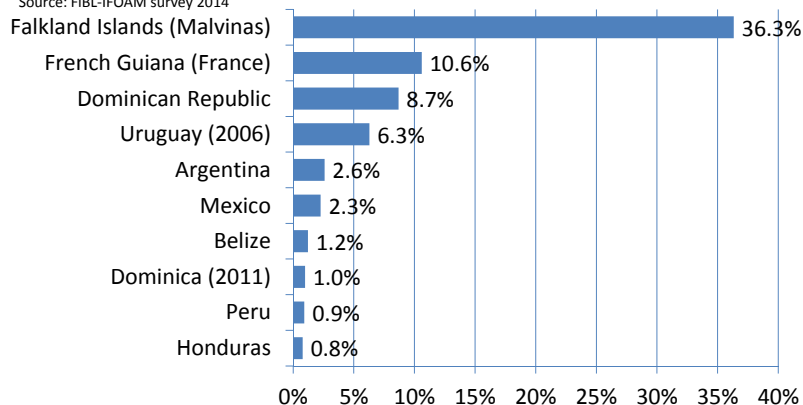


48

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

Latin America and Caribbean: The countries with the highest share of organic agricultural land 2012

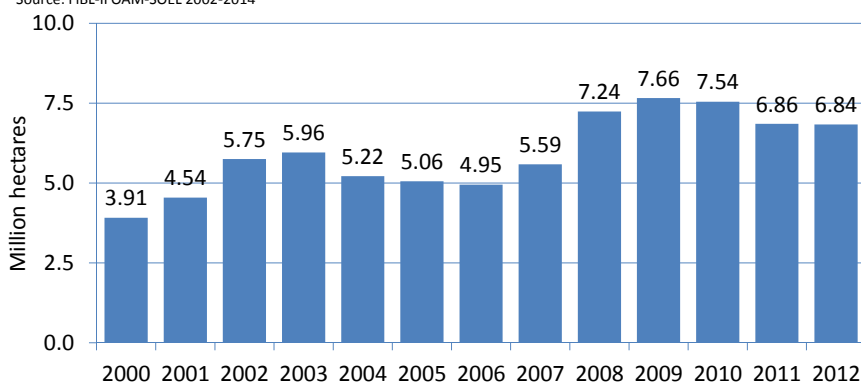
Source: FiBL-IFOAM survey 2014



Latin America: Development of organically managed agricultural land 2000-2012

Latin America and Caribbean: Development of organic agricultural land 2000 to 2012

Source: FiBL-IFOAM-SOEL 2002-2014

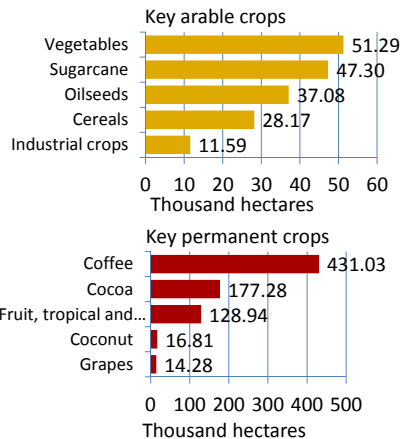
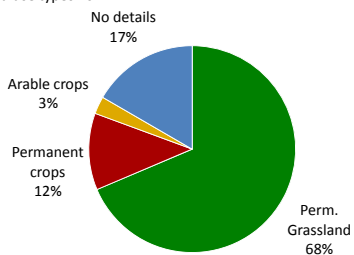


Latin America: Use of organic agricultural land 2012 (total: 6.8 million hectares)

Latin America and Caribbean: Use of agricultural organic land 2012

Source: FiBL-IFOAM Survey 2014; based on information from the private sector, certifiers, and governments.

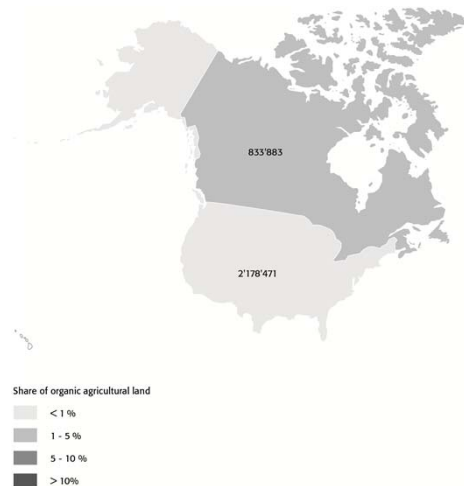
Land use types 2012



Articles about Latin America and the Caribbean in the 2014 Edition of "The World of Organic Agriculture"

- › Organic Agriculture in Latin America and the Caribbean
Patricia Flores Escudero

North America: Organic agricultural land by country 2012



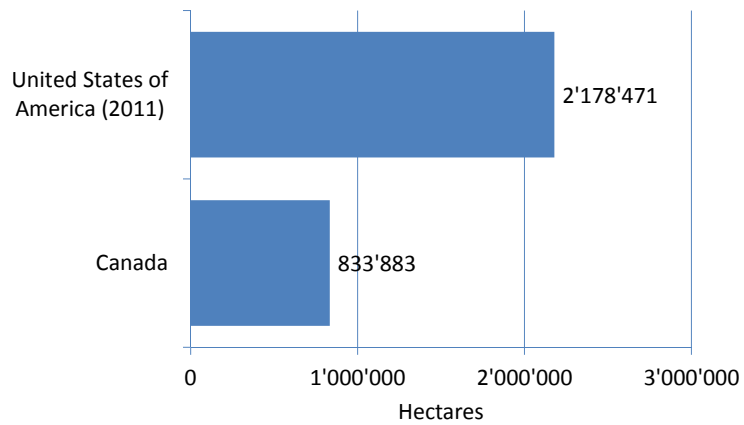
Organic Agriculture in North America: Key figures 2012

- › In North America, 3 million hectares are managed organically, of these are two million in the United States and 0.8 million in Canada.
- › This represents 0.7 percent of the total agricultural area in the region and more than 8 percent of the world's organic agricultural land. .
- › In the US 31.5 billion US dollars were spent on organic food, which constituted 4. percent of the food market. A further 2.45 billion US dollars were sales of organic non-foods. In Canada, organic food sales were 3 billion Canadian dollars.
- › Projections for 2013 and beyond indicate higher growth rates for organic sales in North America.

North America: Organic agricultural land 2012

Organic Agriculture in North America 2012

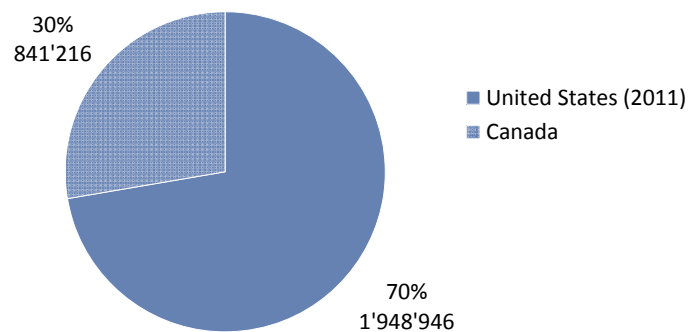
Source: COG and USDA



North America: Distribution of organic agricultural land by country 2012 (Total: 3 million hectares)

North America: Distribution of organic agricultural land by country 2012 (Total: 3 million hectares)

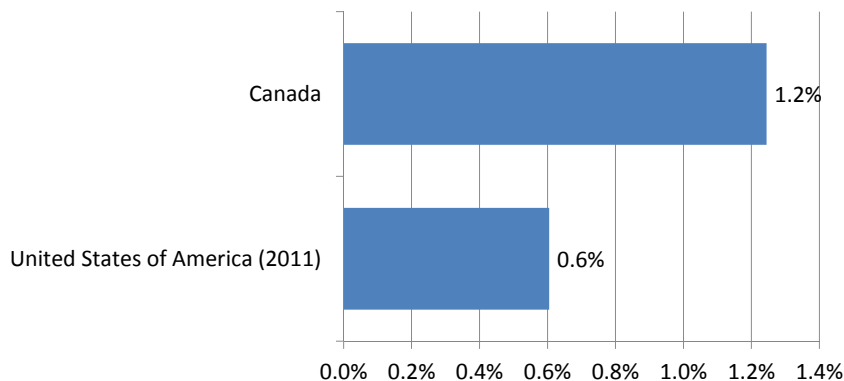
Source: FiBL-IFOAM survey 2014



North America: Shares of organic agricultural land 2012

North America: Organic share of total organic agricultural Land 2012

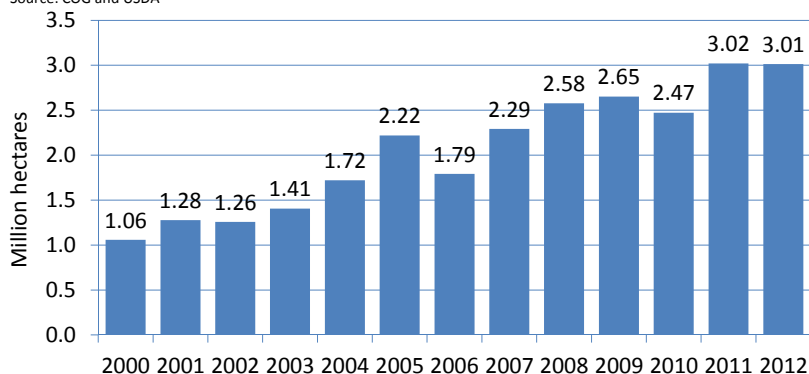
Source: COG and USDA



North America: Development of organic agricultural land 2000-2012

North America: Development of organic agricultural land 2000-2012

Source: COG and USDA

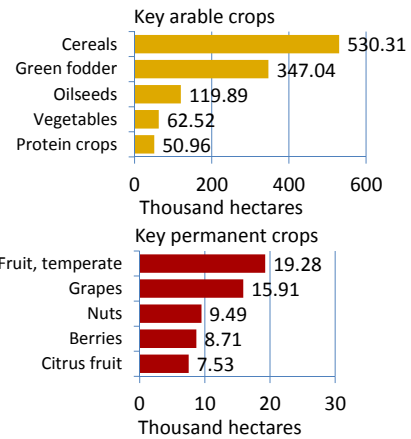
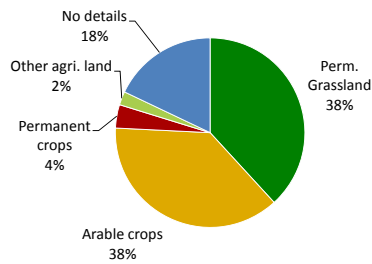


North America: Use of organic agricultural land 2012 (total: 3 million hectares)

North America: Land use in organic agriculture 2012

Source: COG and USDA

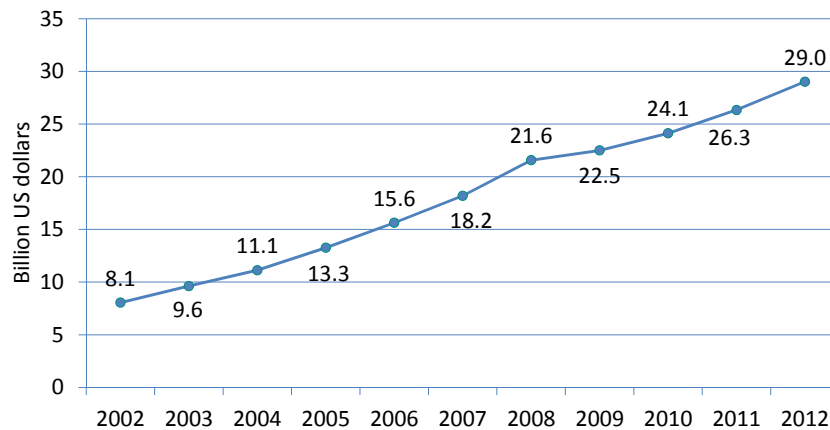
Land use types 2012



United States: Retail sales growth 2002-2012

United States: Retail sales growth 2002-2012

Source: Organic Trade Association



Articles about North America in the 2014 Edition of "The World of Organic Agriculture"

- > Another Milestone Year for the U.S. Organic Industry
Barbara Fitch Haumann
- > Organic Agriculture in Canada
Matthew Holmes and Anne Macey

Oceania: Organic agricultural land by country 2012



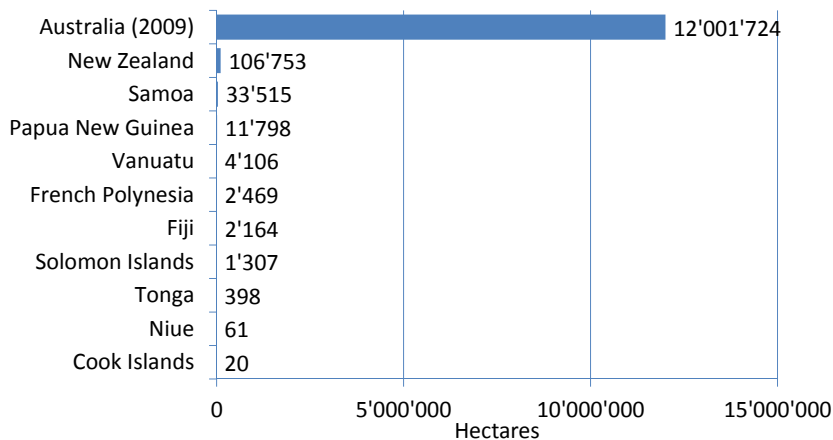
Organic agriculture in Oceania: Key figures 2012

- › This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu.
- › Altogether, there are more than 14'500 producers, managing 12.2 million hectares.
- › This constitutes 2.9 percent of the agricultural land in the area and almost 32 percent of the world's organic land.
- › Ninety-seven percent of the organic land in the region is in Australia (12 million hectares, 96 percent of which is extensive grazing land), followed by New Zealand (106'753 hectares), and Samoa (33'515 hectares).
- › The highest shares of all agricultural land are in Samoa (11.8 percent), followed by French Polynesia (5.5 percent), Australia (2.9 percent) and Vanuatu (2.2 percent).

Oceania: Organic agricultural land 2012

Oceania: Organic agricultural land by country 2012

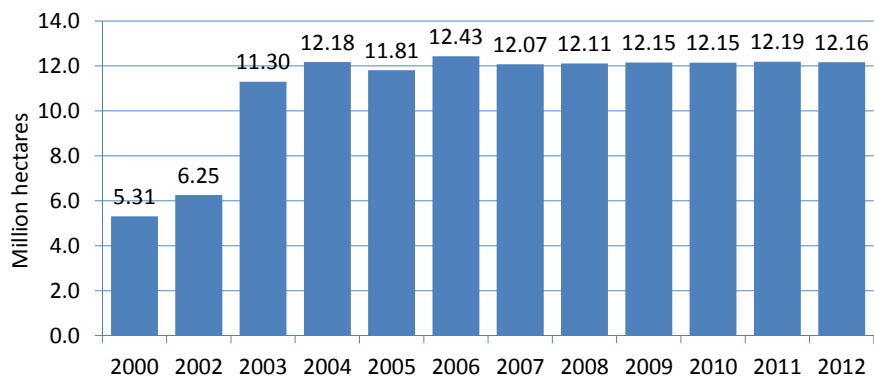
Source: FiBL-IFOAM survey 2014



Oceania: Development of organic agricultural land 2000-2012

Oceania: Development of organic agricultural land 2000-2012

Source: FiBL-IFOAM-SOEL 2002-2014

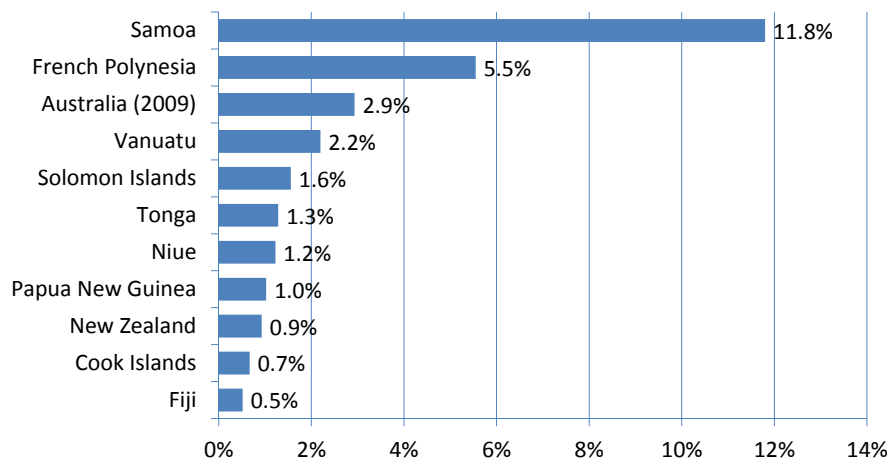


66

Oceania: Shares of organic agricultural land 2012

Oceania: Share of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014

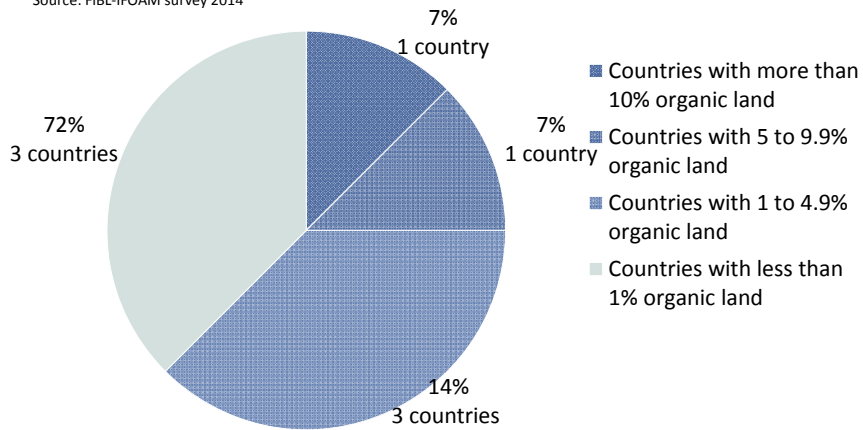


67

Oceania: Distribution of shares of organic land 2012

Oceania: Distribution of shares of organic land 2012

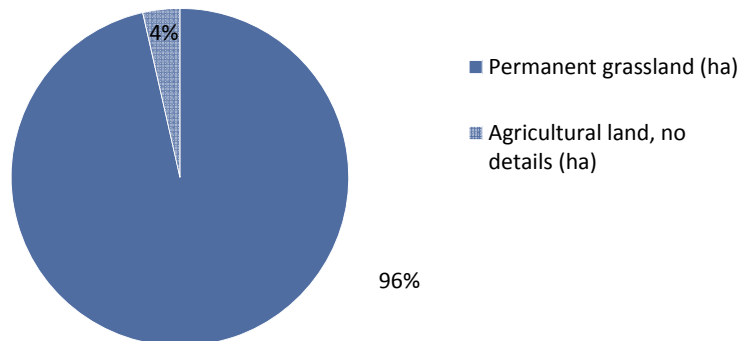
Source: FiBL-IFOAM survey 2014



Oceania: Use of organic agricultural land 2012 (total: 12.2 million hectares)

Oceania: Use of organic agricultural land 2012 (total: 12.2 million hectares)

Source: FiBL-IFOAM survey 2014



Articles about Oceania in the 2014 Edition of "The World of Organic Agriculture"

- › Organic Farming in Australia
Alexandra Mitchell and Paul Kristiansen
- › The Pacific Islands
Karen Mapusua

References and data sources

- › FiBL* and IFOAM** (2014): Data on organic agriculture world-wide. In: FiBL& IFOAM (2014): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › FiBL*, AMI*** and IFOAM**: Organic market data. In: FiBL& IFOAM (2014): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › Willer, Helga and Julia Lernoud (2014): Current Statistics on Organic Agriculture Worldwide: Organic Area, Producers and Market. In: FiBL& IFOAM (2014): The World of Organic Agriculture. Statistics and Emerging Trends 2014. Frick and Bonn.
- › For detailed data sources by country please check <http://www.organic-world.net/fileadmin/documents/yearbook/2014/web-fibl-ifoam-2014-320-340.pdf>
- › *FiBL= Research Institute of Organic Agriculture, Switzerland; **IFOAM = International Federation of Organic Agriculture Movements, Germany; ***AMI = Agricultural Information Company, Germany
- › More information at <http://www.organic-world.net/yearbook-2014.html>

More information

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