



# Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2019

## Part I: Global data and survey background

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## Part I: Global data and survey background

- Data compiled by the Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, based on national data sources and data from certifiers.
- Data as published February 2019 in FiBL & IFOAM – Organics International (2019): The World of Organic Agriculture. Statistics and Emerging Trends 2019. Frick and Bonn
- For updates, check [www.organic-world.net](http://www.organic-world.net)
- This presentation is available online at: <http://www.organic-world.net/yearbook/yearbook2019/slide-presentations.html>
- Texts and graphs: Helga Willer and Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland
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# Acknowledgements\*

- The Swiss State Secretariat of Economic Affairs SECO, Berne
- International Trade Centre ITC
- Sustainability Fund of Coop Switzerland
- Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair
- IFOAM – Organics International
- 200 experts from all parts of the world contributed to the FiBL survey 2019



\* See also disclaimer on last page of this slide show

**FiBL**

[www.fibl.org](http://www.fibl.org)

# The World of Organic Agriculture 2019

The 20th edition of “The World of Organic Agriculture”, was published by FiBL and IFOAM in February 2019.\*

- Contents:
  - Results of the survey on organic agriculture worldwide.
  - Numerous graphs, tables, maps and infographics.
  - Organic agriculture in the regions and reports from Australia, Canada, the Pacific Islands, and The United States of America.
  - Chapters on the global market, standards & legislations, PGS, policy support, the European market, etc.
  - Commodity case studies:
    - Chapter on organic cotton
    - Overview of the state of other Voluntary Sustainability Standards
  - The book can be ordered via IFOAM.bio and shop.FiBL.org.

\*Willer, H, Lernoud, J, (2019) The World of Organic Agriculture. Statistics and Emerging Trends 2019. FiBL, Frick, and, IFOAM – Organics International, Bonn



# Website www.organic-world.net

- Detailed statistics in excel format
- Graphs & Maps
- Data revisions
- News and background information

## Organic World

Global organic farming statistics and news

FiBL

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### Yearbook "The World of Organic Agriculture"

The yearbook "The World of Organic Agriculture - Statistics and Emerging Trends", published by the Research Institute of Organic Agriculture (FiBL) and IFOAM - Organics International documents recent developments in global organic agriculture. The book has been published annually since 2000.

The 2019 edition was launched at BIOFACH 2019.

The data are available in an interactive database on [statistics.fibl.org](https://statistics.fibl.org).

A central part of the book are the organic agricultural statistics, which are collected annually in the frame of the [annual survey on organic agriculture worldwide](#).

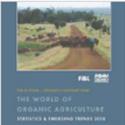
The project is funded by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), the Sustainability Fund of Coop Switzerland, NürnbergMesse, and IFOAM - Organics International.

### The World of Organic Agriculture 2019



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### The World of Organic Agriculture 2017



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## About this presentation

There are 3 presentations summarizing the key results of the FiBL survey on organic agriculture worldwide 2019 (data 2017). Apart from the global data, key results on crop and on regional data are presented. More information is available at [www.organic-world.net](http://www.organic-world.net)

The following three presentations are available at <http://www.organic-world.net/yearbook/yearbook2019/slide-presentations.html>:

- Part 1: Global data from 2017 and survey background
- Part 2: Land use and key crops in organic agriculture in 2017
- Part 3: Organic agriculture in the regions in 2017

# The 20th survey on organic agriculture worldwide

The 20th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture (FiBL) in cooperation with partners from all around the world. The results were published jointly by FiBL and IFOAM – Organics International.

The survey was carried out between July 2018 and February 2019.

Data were received from 181 countries.

Updated data on area and producers were available for 146 countries.

Data was provided by over 200 country experts (representatives from NGOs, certification bodies, governments, researchers).

The following data was collected: area data (including land use and crop details); producers and other operator types; domestic market values; export and import data; and livestock data (head of livestock and production in metric tons);

The results are published in the yearbook “The World of Organic Agriculture 2019” and at [www.organic-world.net](http://www.organic-world.net).

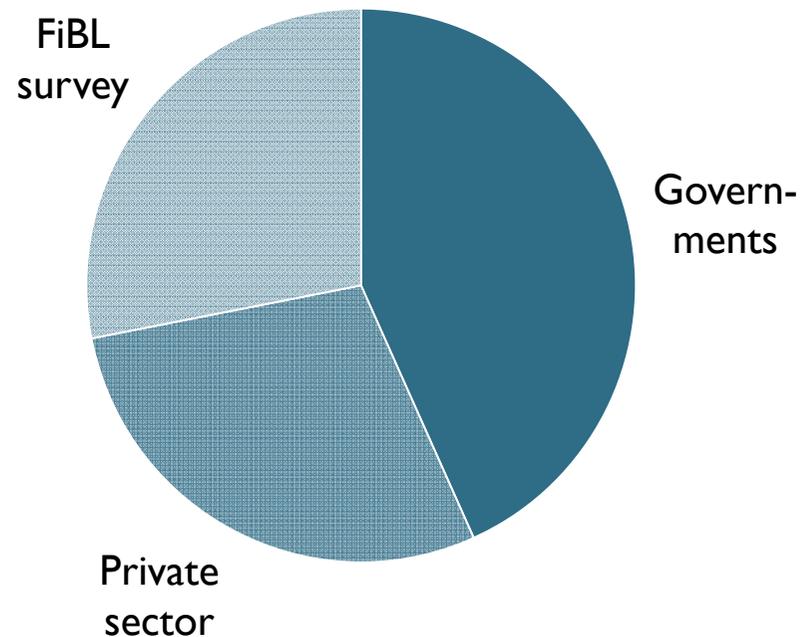
# Countries covered by the survey on organic agriculture 2017

Region	Countries* with data on organic agriculture	Countries per region <sup>1</sup>	Share of countries that provided data (%)
Africa	44	56	79%
Asia	41	49	84%
Europe	47	49	96%
Latin America and Caribbean	33	46	72%
North America	3	5	60%
Oceania	13	25	52%
<b>World</b>	<b>181</b>	<b>230</b>	<b>79%</b>

Source: FiBL survey 2019

\*Where the designation "country" appears in this book, it covers countries or territories.<sup>2</sup>

# Organic data collection systems worldwide for data on area, operators and production (total 181 countries)



- Government collection systems
  - Data from the certifiers
  - Census/farm structure survey
  - Direct payments
- Private collection systems
  - Data from the certifiers
  - Company data
- No collection system
  - FiBL collect the data from the international certifiers

# International certifiers that provided data for several countries



# Networks, transnational data collection efforts



# General notes on the data

**Data sources:** For data sources see annex of The World of Organic Agriculture 2019 or [www.organic-world.net/statistics-data-sources.html](http://www.organic-world.net/statistics-data-sources.html)

**Countries:** For countries and territories, the FAO country list is used. Where the designation "country" appears in this report, it covers countries or territories. For the countries' grouping by region, the Standard Country and Area Classifications as defined by the United Nations Statistics Division, is used in most cases.

**Term organic:** In the tables, the term organic refers to the fully converted and in-conversion areas.

**Organic share:** In some cases, the calculation of the organic share of the total agricultural land or that of individual crops, based on FAOSTAT and in some cases the Eurostat data, might differ from the organic shares obtained from ministries or local experts.

**Producers:** Some countries report the number of smallholders while others only report the number of companies, projects, or grower groups, which may each comprise a number of producers. This applies in particular to many African countries. The number of producers is, therefore, probably higher than the number communicated in this report.

**Data revisions:** Should data revisions and correction become necessary these are communicated at the [data revision pages](http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2) of Organic-World.net: <http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2>.

# The World of Organic Agriculture 2017

## Organic Farmland 2017

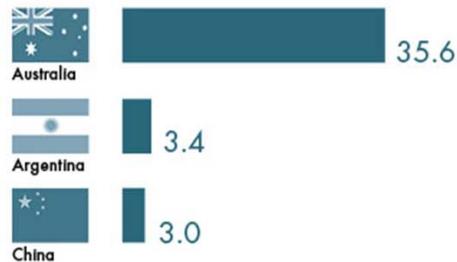


**69.8 m ha** Organic farmland in million hectares

**+20%** From 2016

**181** Countries with organic farming

### Top 3 countries (land in million of hectares)



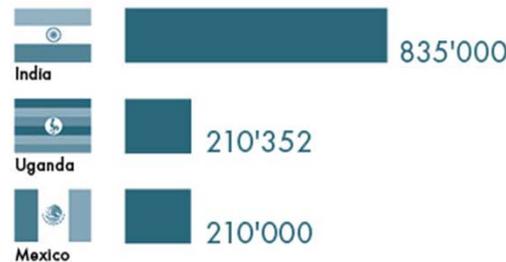
## Organic Producers 2017

The number of organic producers is increasing

**2.9 million** Organic farmers

**+4.7%** From 2016

### Number of producers: Top 3 countries

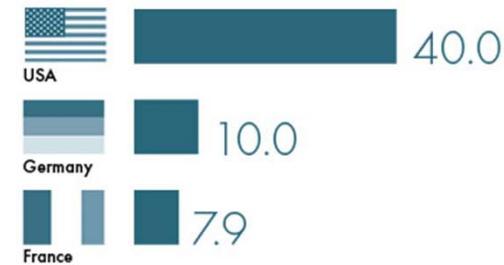


## Organic Market 2017

The global market is growing and consumer demand is increasing

**More than 92** Global organic food market in billion euros

### Top 3 countries (market in billion euros)



**18.0%** Organic market growth

**13.3%** Market share

**288 €** Highest per capita spending is in Switzerland

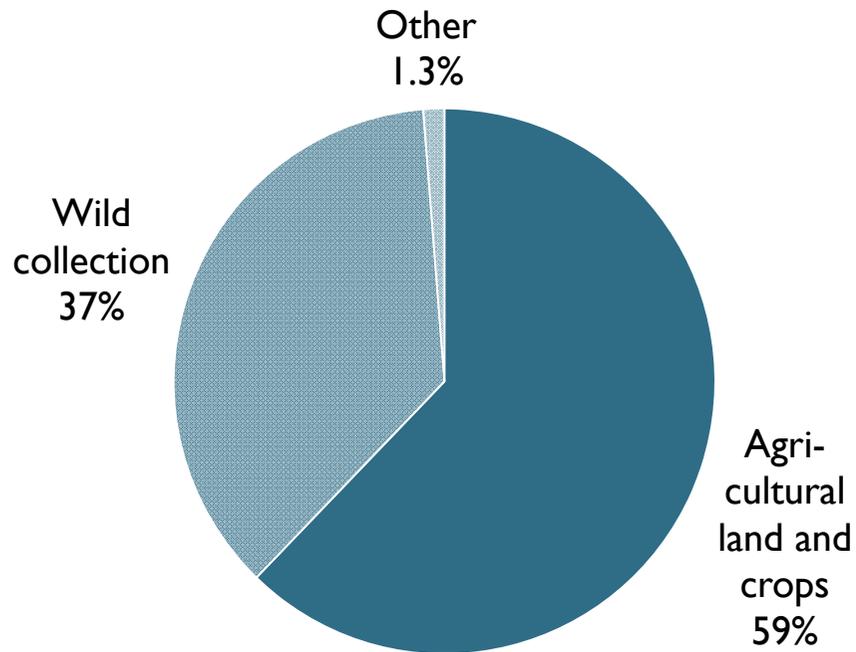
# Key data/indicators on organic agriculture worldwide 2017

- 181 countries have data on organic agriculture.
- 69.8 million hectares of agricultural land are organic (including in-conversion areas).
- 14 countries have ten percent organic agricultural land or more, and 16 countries have between 5 and 10 percent organic agricultural land.
- There are almost 41 million hectares of further organic non-agricultural areas.
- 2.9 million producers were reported.
- Global organic market reached 92.1 billion euros.

# World: Distribution of organic areas 2017

## Distribution of all organic areas in 2017

Source: FiBL survey 2019



- Agricultural land (69.8 million hectares in 2017)
  - 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 (42.4 million hectares in 2017)
  - Wild collection/Bee keeping (41 million hectares)
  - Forest
  - Aquaculture
  - Grazing areas on non-agricultural land

# World: Organic agricultural land by region 2017

Currently 69.8 million hectares are under organic agricultural management (end of 2017 for most data).

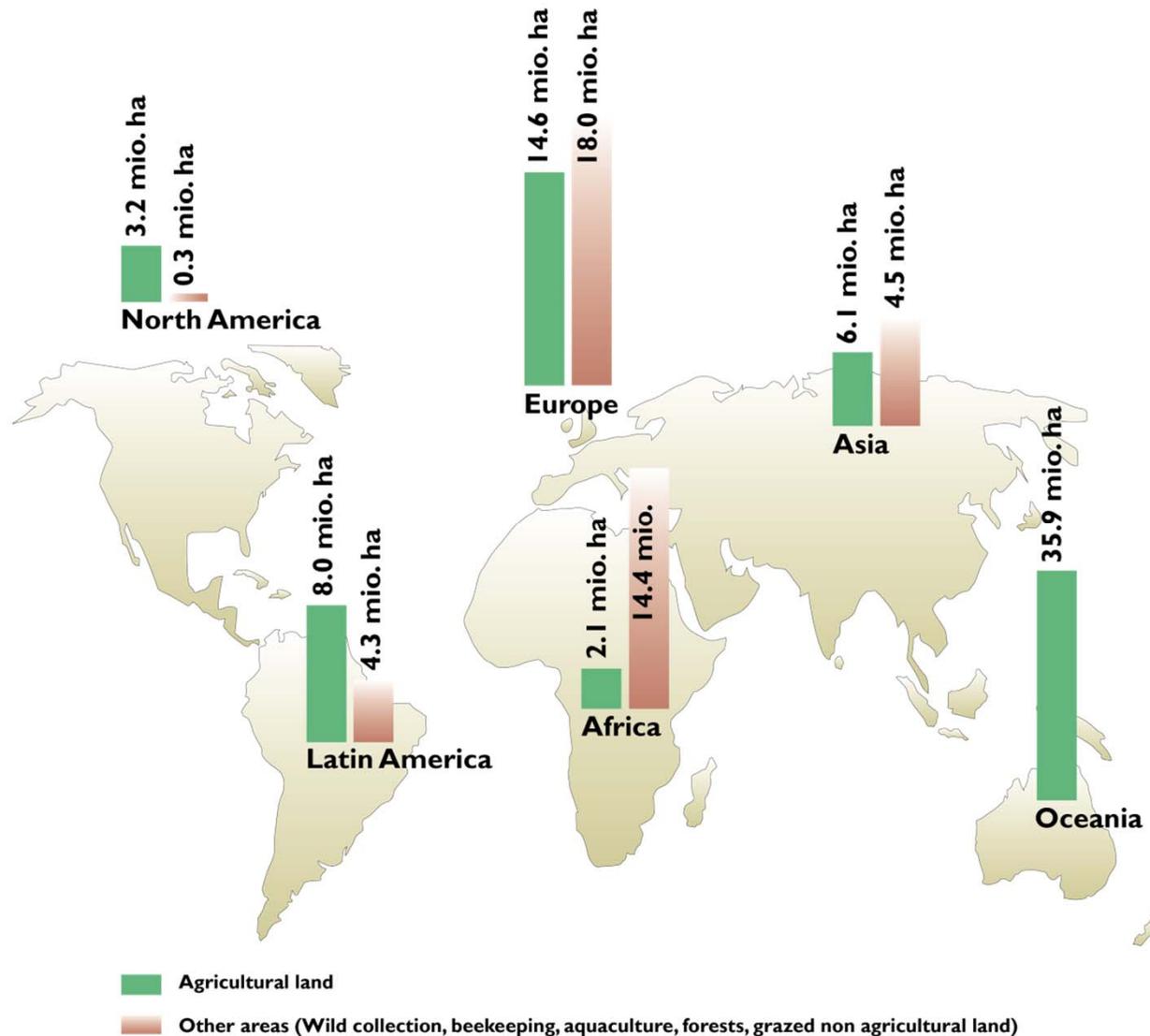
The distribution of the organic agricultural land is as follows:

- Oceania (35.9 million hectares);
- Europe (14.6 million hectares);
- Latin America (8.0 million hectares);
- Asia (6.1 million hectares);
- North America (3.2 million hectares);
- Africa (2.1 million hectares).

Oceania has half of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, has over 20 percent of the world's organic agricultural land followed by Latin America with 11 percent.

Apart from the organic agricultural land, there are further organic areas such as wild collection areas. These areas constitute more than 42.4 million hectares.

# World: Organic agricultural land and other organic areas 2017



# ORGANIC FARMLAND 2017

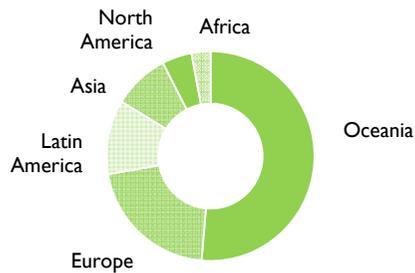


In Oceania there were 35.9 Mio ha, in Europe 14.6 Mio ha, and in Latin America 8 Mio ha.

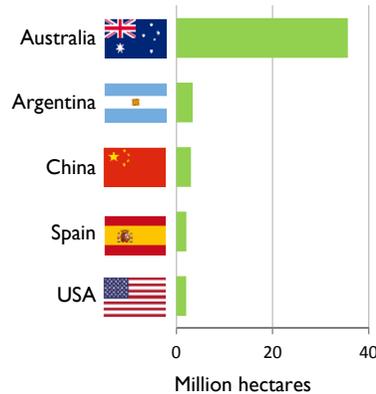
The ten countries with the largest organic agricultural areas have combined 79% of the world's organic agricultural land.

14 countries have 10% or more of their agricultural land under organic management.

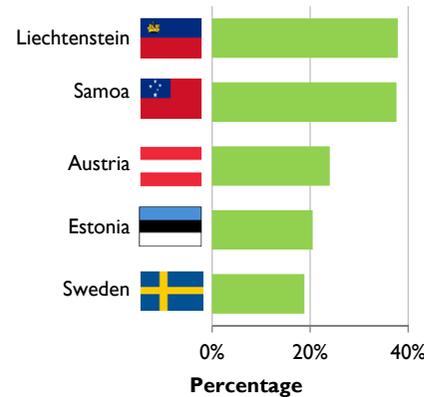
In 2017, over 11.7 million hectares more were reported compared with 2016.



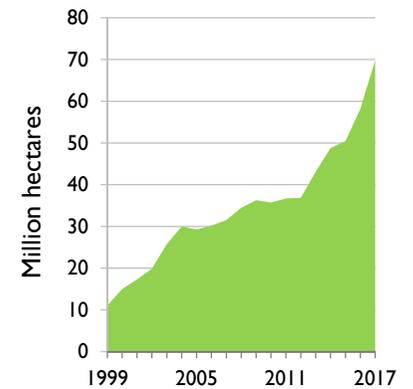
Distribution of organic agricultural land by region 2017



The five countries with the largest areas of organic agricultural land 2017



Top five countries with more than 10 percent of organic agricultural land 2017

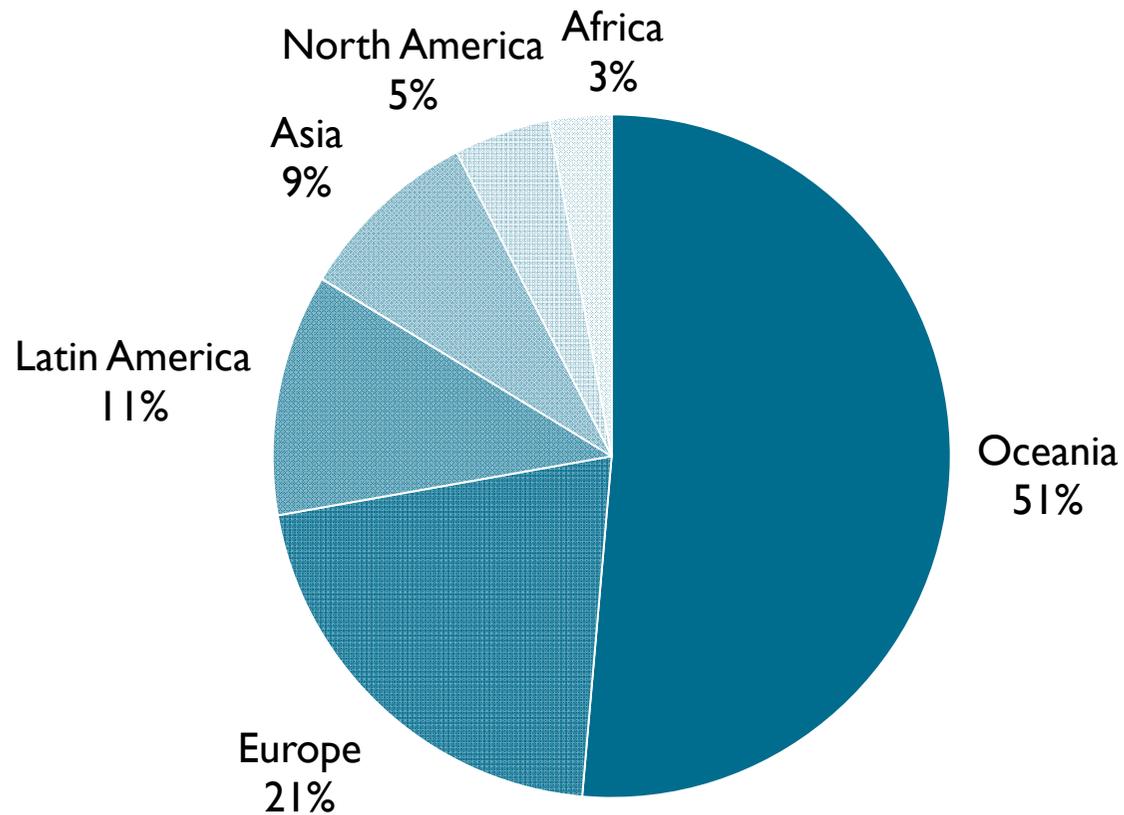


Growth of the organic agricultural land 1999-2017

# World: Organic agricultural land by region 2017

## Distribution of organic agricultural land by region 2017

Source: FiBL survey 2019



## **World: The countries with the most organic agricultural land 2017**

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

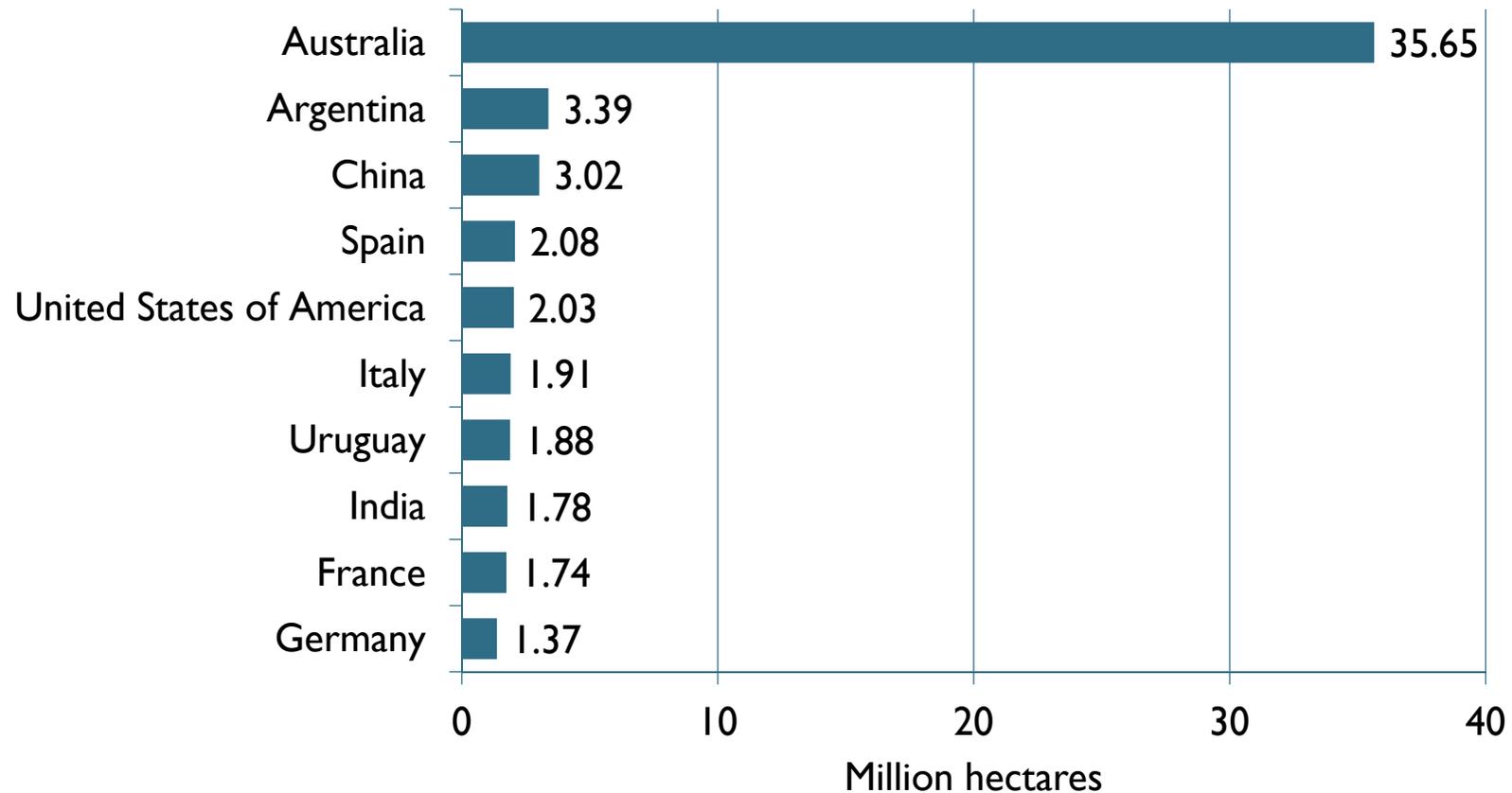
Argentina is second, followed by China in third place.

The ten countries with the most organically managed agricultural land have a combined total of 55 million hectares and constitute three-quarters of the world's organic agricultural land.

# World: Organic agricultural land 2017: Top ten countries

## The ten countries with the largest areas of organic agricultural land 2017

Source: FiBL survey 2019



# World: Share of organic land of total agricultural area 2017

**1.4 percent** of the global agricultural land is organic.

By region, the share is highest in Oceania (8.5 percent), followed by Europe with 2.9 percent and Latin America with 1.1 percent.

In the European Union, the share of organically managed land is 7.2 percent. In the other regions, the share of organically managed land is less than one percent.

Fourteen countries have 10 percent organic land or more, and 16 countries have between 5 and 10 percent organic land.

However, almost 60 percent of the countries for which data are available have less than one percent organic agricultural land.

The country with the highest share is Liechtenstein (37.9 percent), followed by the Samoa (37.6 percent) and Austria (24.0 percent).

It is interesting to note that many island states have high shares of agricultural land under organic management, such as Samoa and Sao Tome and Principe.

# World: Shares of organic agricultural land by region 2017

**Table 4: World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2017**

Region	Organic agr. land [ha]	Share of total agri. land
Africa	2'056'571	0.2%
Asia	6'116'834	0.4%
Europe	14'558'246	2.9%
Latin America	8'000'888	1.1%
North America	3'223'057	0.8%
Oceania	35'894'365	8.5%
<b>World*</b>	<b>69'845'243</b>	<b>1.4%</b>

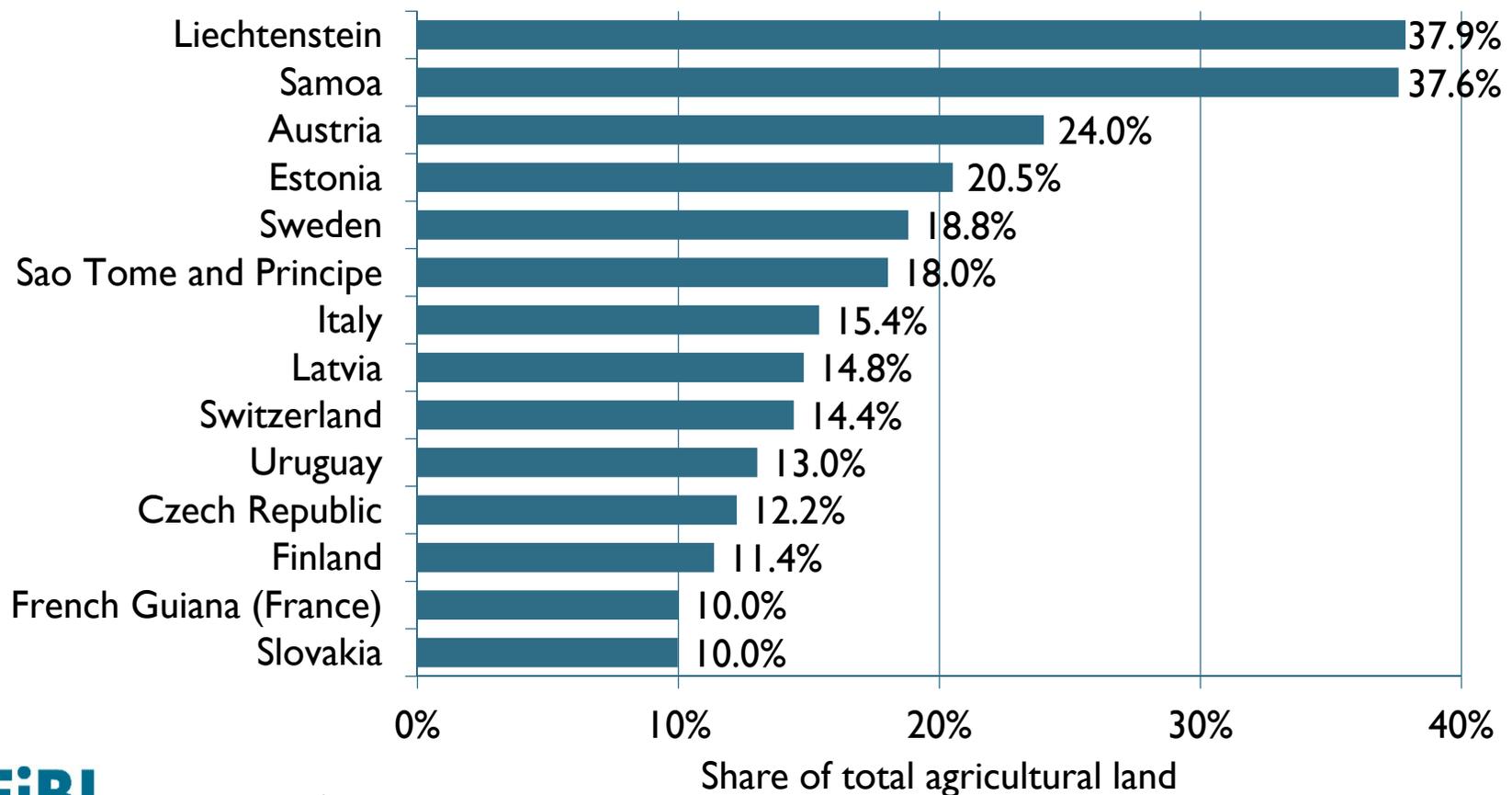
Source: FiBL survey 2019.

\* Total includes correction value for French overseas departments.

# World: The highest shares of organic agricultural land 2017

## Countries with an organic share of at least 10 percent of the agricultural land 2017

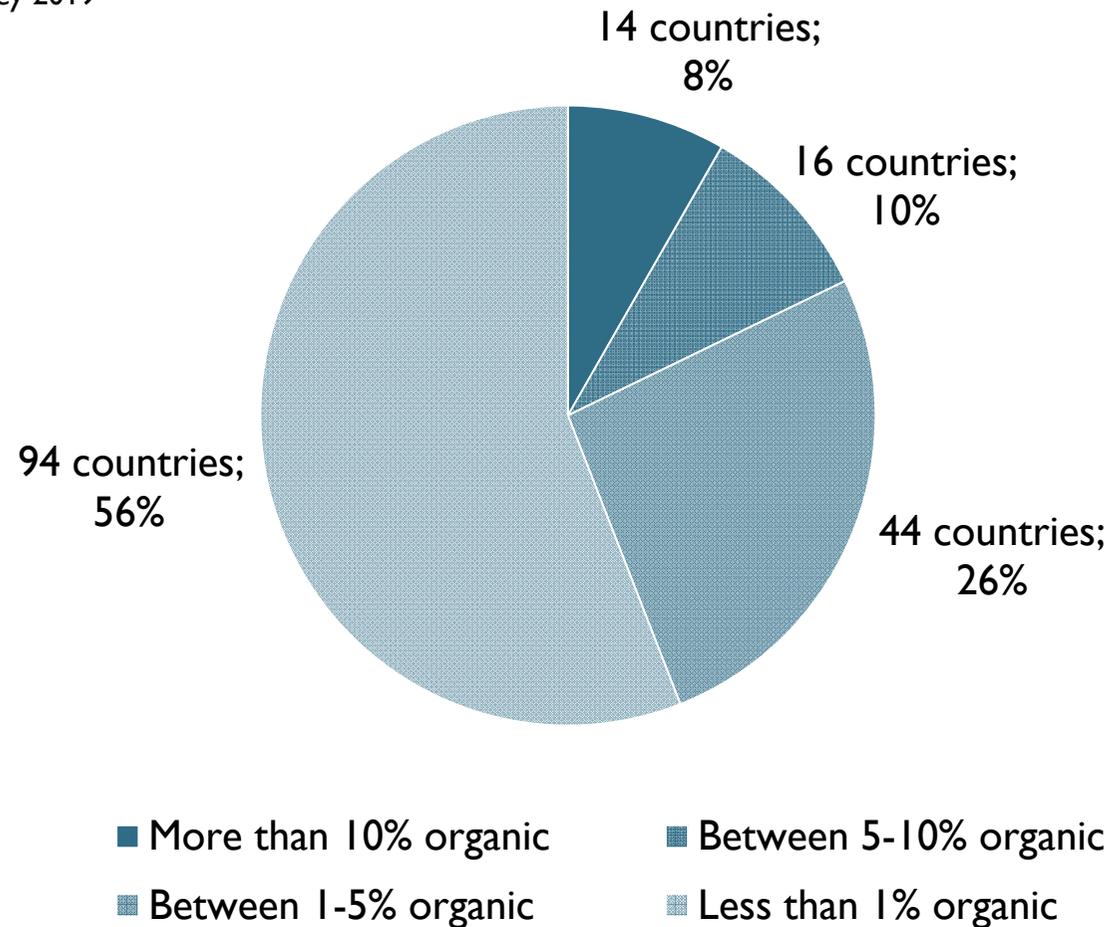
Source: FiBL survey 2019



# World: Distribution of organic shares 2017

## Distribution of the organic shares of the agricultural land 2017

Source: FiBL survey 2019



## World: Growth of the organic agricultural land 2017

Organic agriculture land increased by 20% (11.7 million hectares) between 2016 and 2017.

This increase is mainly due to the fact that 8.5 million additional hectares were reported from Australia. However, many other countries reported an important increase, thus contributing to the global increase of the organic land, like China (32 percent increase; over 0.7 million hectares more) and Argentina (12 percent increase; almost 0.34 million hectares more), and India an additional 0.3 million hectares.

Compared with 1999, when 11 million hectares were organic, organic agricultural land has increased six-fold.

Ninety-three countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 36 countries. In 40 countries, the organic agricultural area either did not change or no new data was received.

# World: Growth of the organic agricultural land by region

**Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2016-2017 and 10 years growth**

Region	Organic agr. land 2016 [ha]	Organic agr. land 2017 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Africa	1'801'699	2'056'571	+254'871	+14.1%	+1'163'089	+130.2%
Asia	4'897'837	6'116'834	+1'218'996	+24.9%	+2'757'650	+82.1%
Europe	13'535'235	14'558'246	+1'023'011	+7.6%	+6'261'881	+75.5%
Latin America	7'479'288	8'000'888	+521'600	+7.0%	+762'714	+10.5%
North America	3'130'332	3'223'057	+92'725	+3.0%	+645'554	+25.0%
Oceania	27'346'986	35'894'365	+8'547'379	+31.3%	+23'783'698	+196.4%
<b>World*</b>	<b>58'186'980</b>	<b>69'845'243</b>	<b>+11'658'263</b>	<b>+20.0%</b>	<b>+35'372'713</b>	<b>+102.6%</b>

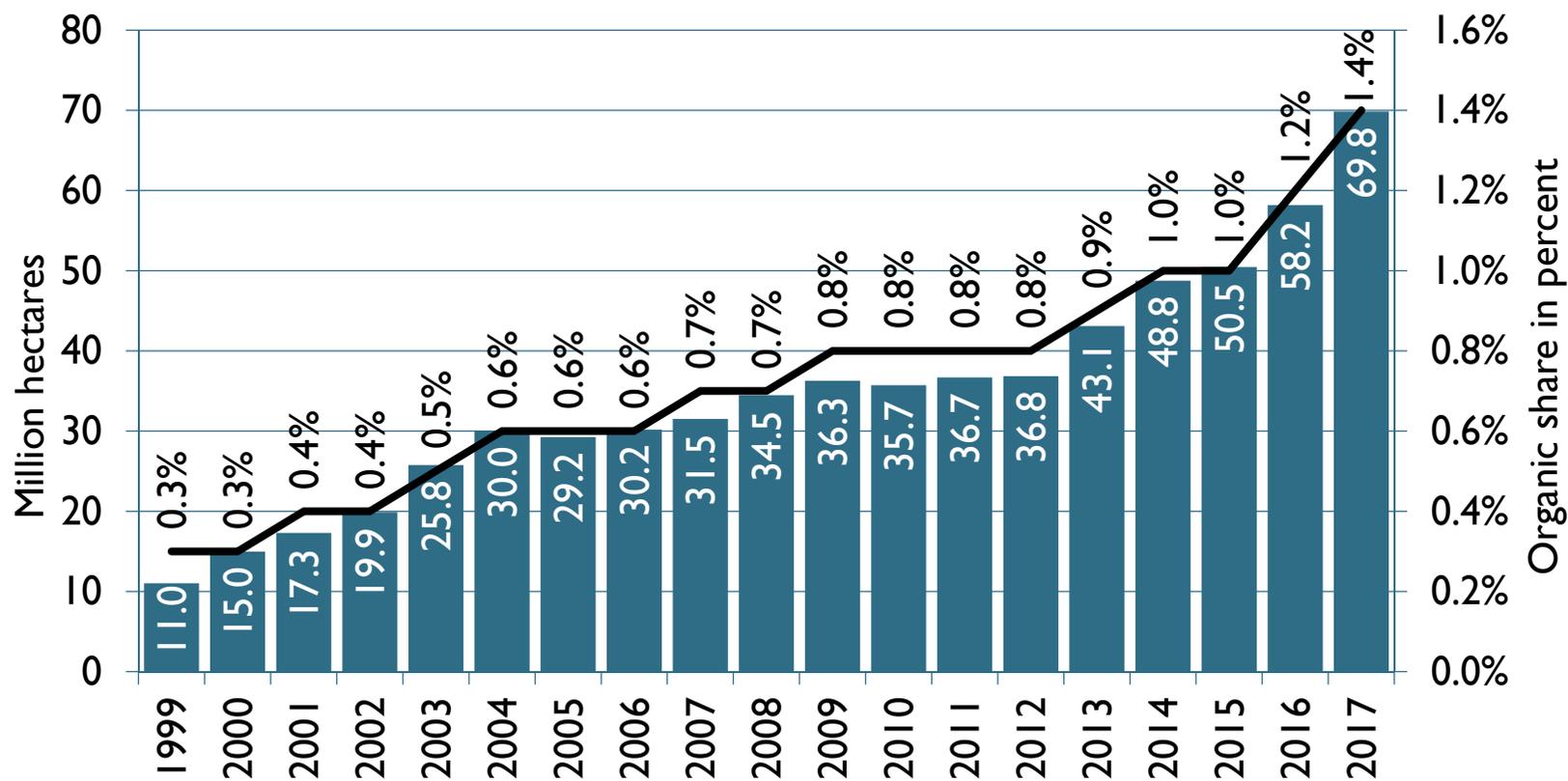
Source: FiBL survey 2019, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 331

\* Total includes correction value for French Overseas Departments.

# World: Growth of the organic farmland and organic share 1999-2017

## Growth of the organic agricultural land and organic share 1999-2017

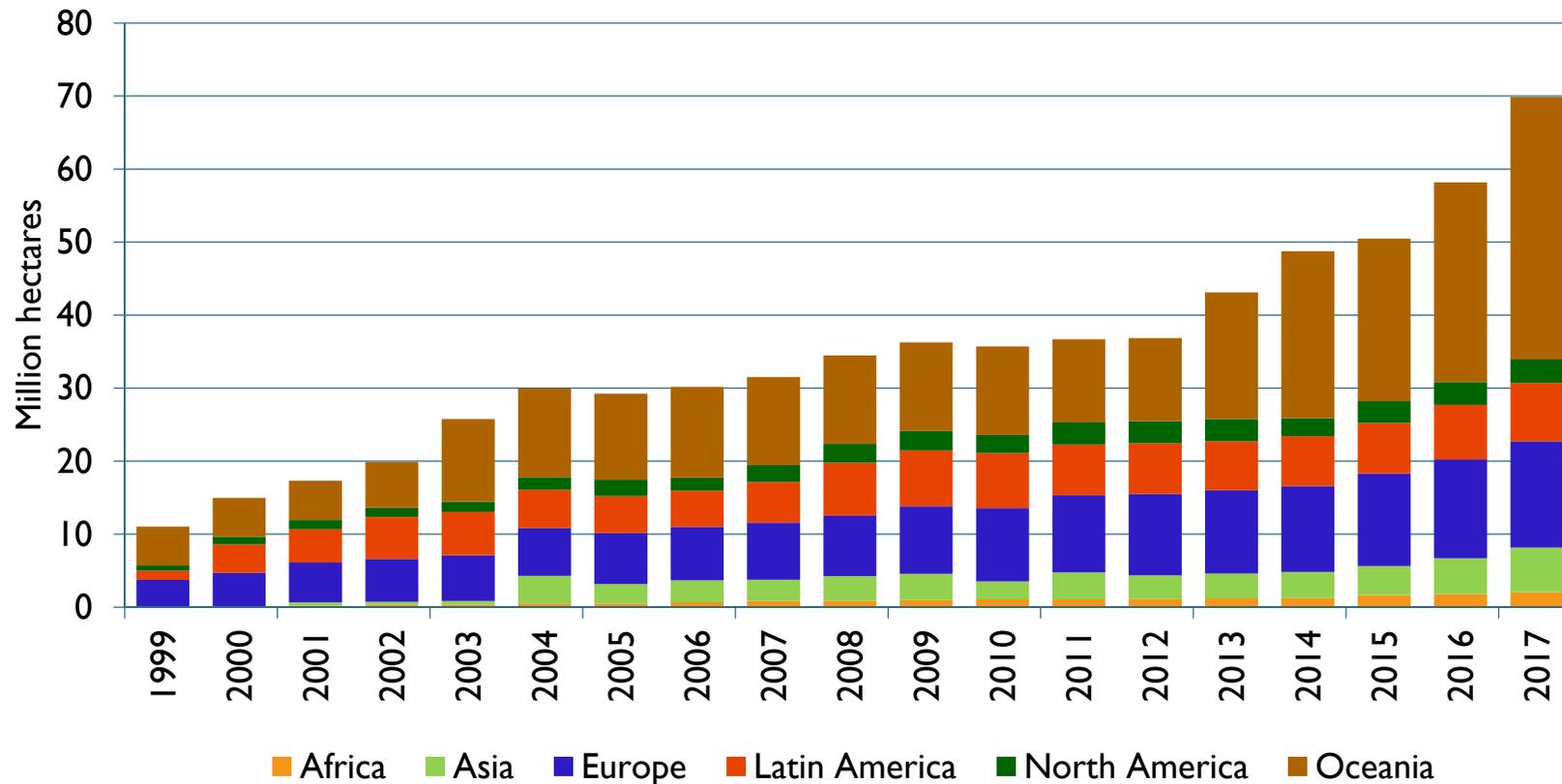
Source: FiBL-IFOAM-SOEL-Surveys 1999-2019



# World: Development of organic agricultural land in the regions 2017

## Development of organic agricultural land in the regions 1999-2017

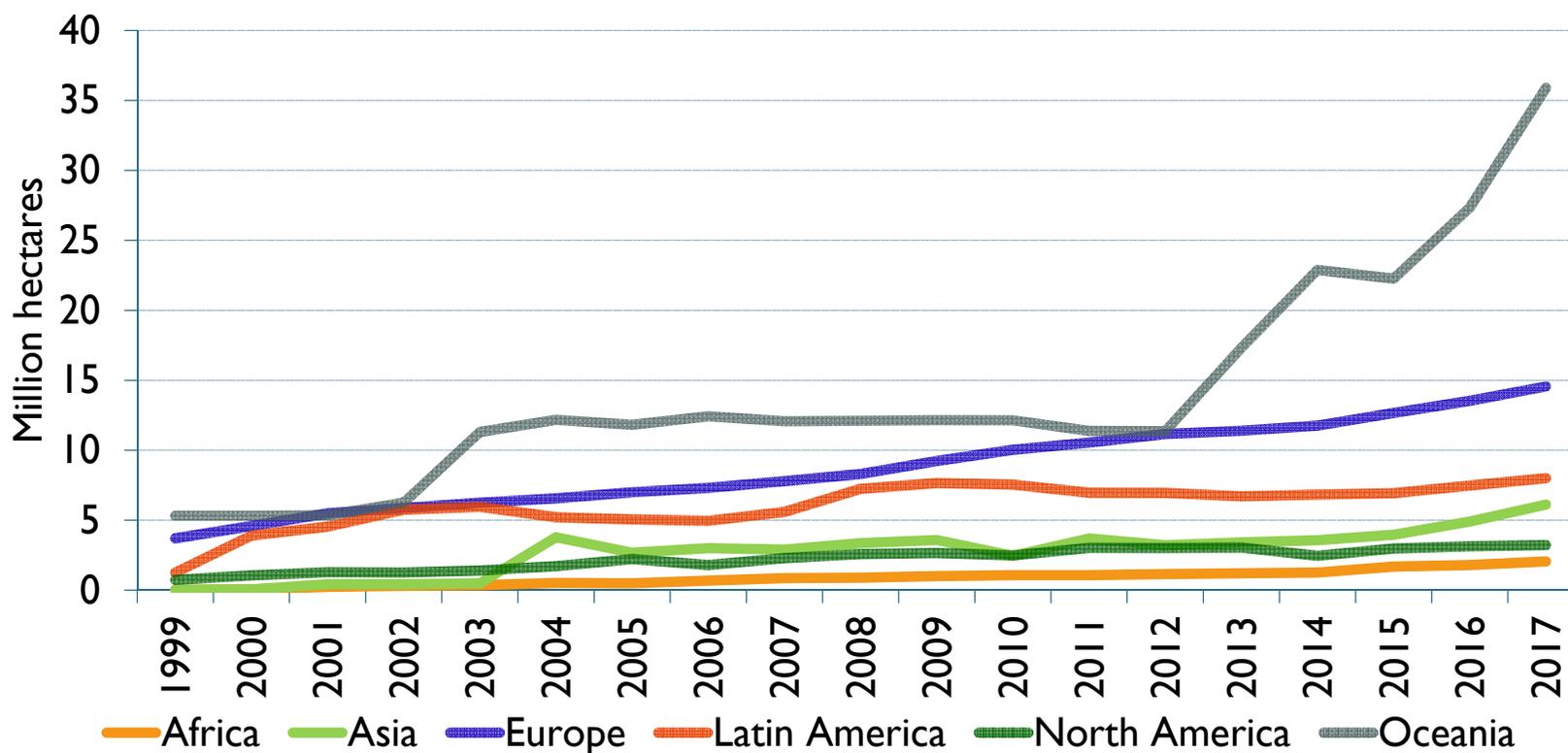
Source: FiBL-IFOAM-SOEL-Surveys 1999-2019



# World: Growth of organic agricultural land by region 2017

## Growth of the organic agricultural land by continent 1999-2017

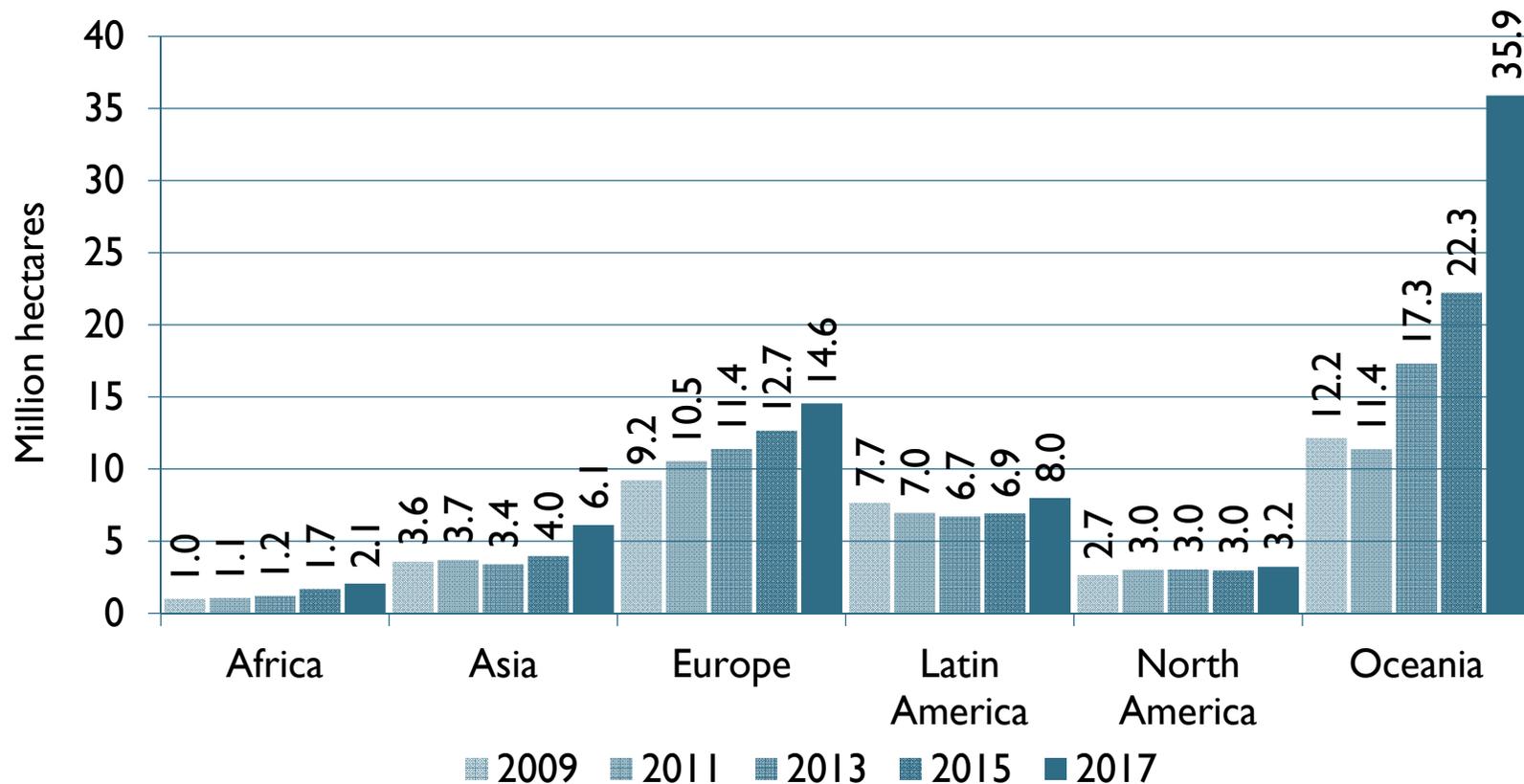
Source: FiBL-IFOAM-SOEL-Surveys 1999-2019



# World: Growth of organic farmland by continent 2017

## Growth of the organic agricultural land by continent 2009-2017

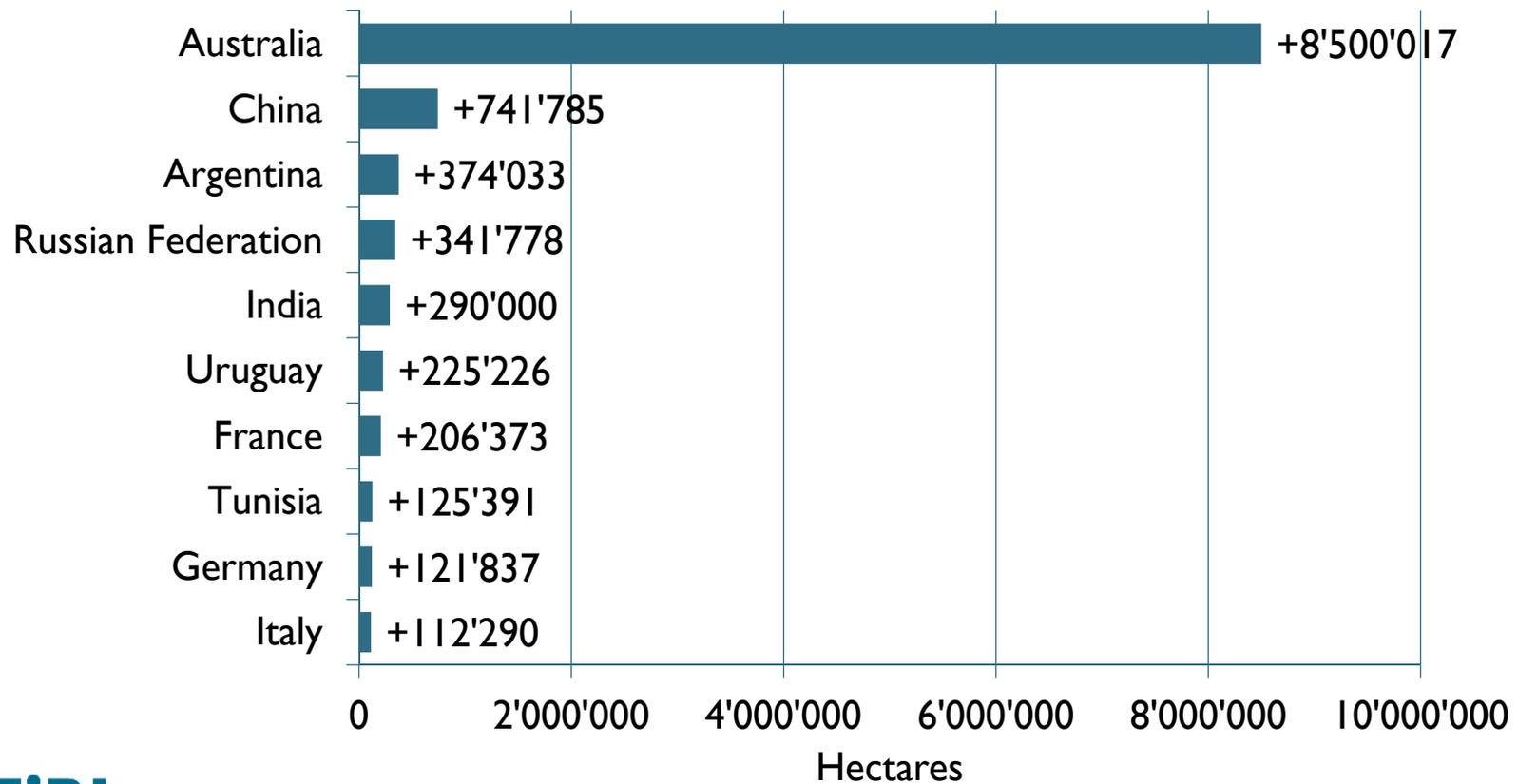
Source: FiBL-IFOAM survey 2010-2019



# World: Growth of organic farmland 2016-2017

## The ten countries with the highest increase of organic land 2017

Source: FiBL survey 2019



## World: 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 42.4 million hectares.

In total, 112.3 million hectares – agricultural land and other areas – were organic in 2017.

## **World: Wild collection and beekeeping areas**

Over 41 million hectares of wild collection and beekeeping areas were reported for 2017.

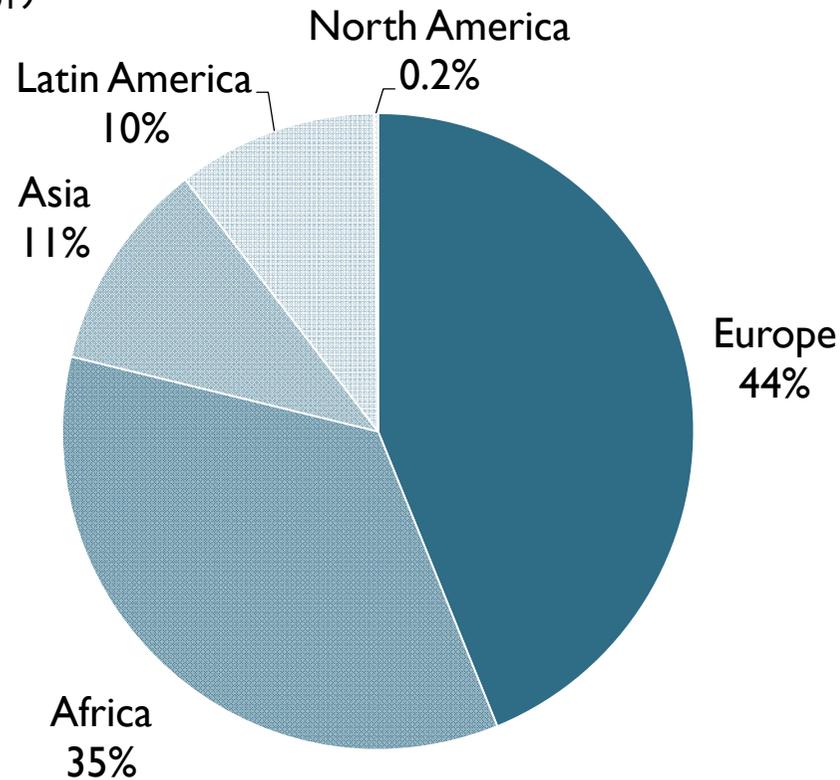
The wild collection / beekeeping areas are more or less evenly distributed over four regions: Europe, Africa, Asia, and Latin America, reflecting quite a different pattern than that for agricultural land.

The collection of wild harvested crops is defined in the IFOAM Basic Standards (IFOAM 2014), and wild collection activities are regulated by organic laws.

# World: Wild collection areas by region 2017

## Distribution of organic wild collection and beekeeping areas by region 2017

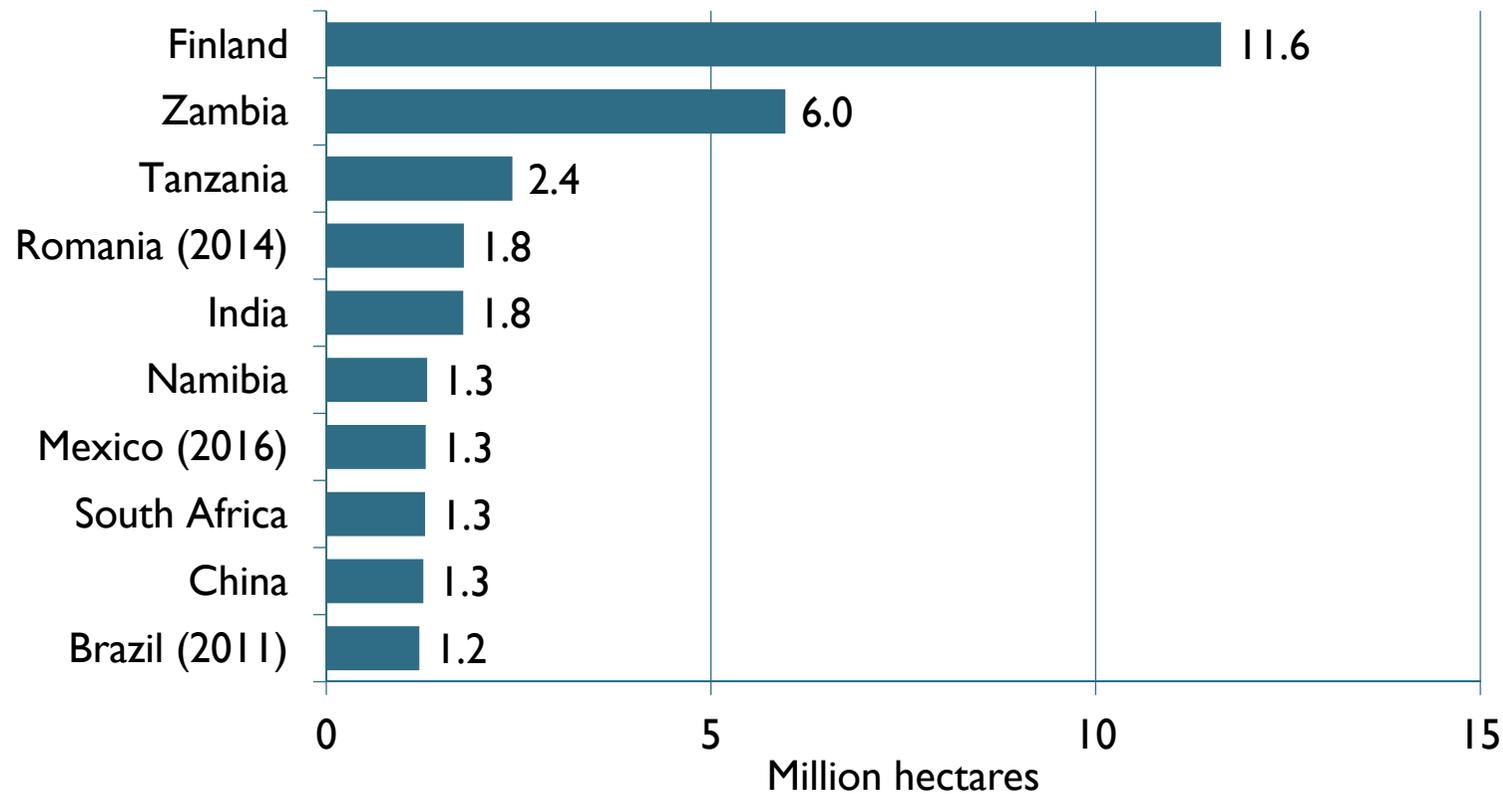
Source: FiBL survey 2019



# World: Organic wild collection 2017: Top 10 countries

## The ten countries with the largest wild collection and beekeeping areas 2017

Source: FiBL survey 2019



## World: Organic producers 2017

For the current survey, a total of 2.9 million organic producers was reported,

According to the data obtained, over 80 percent of the producers are located in Asia, Africa and Latin America.

The country with the most producers is India (835'000), followed by Uganda (210'352) and Mexico (210'000).

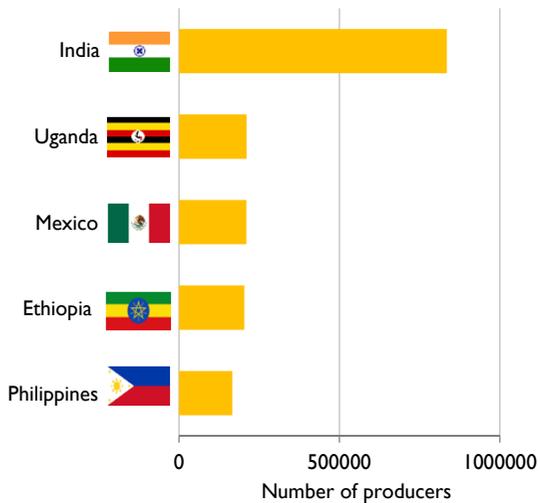
This is an increase of more than 130'000 producers compared to 2016, or 4.7 percent.

It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2.9 million.

# ORGANIC PRODUCERS 2017



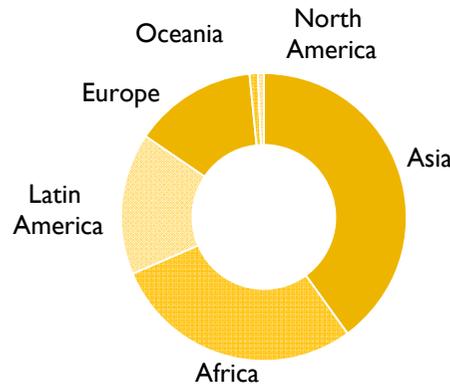
The country with the most organic producers is India, followed by Uganda and Mexico.



The five countries with the largest numbers of organic producers 2017



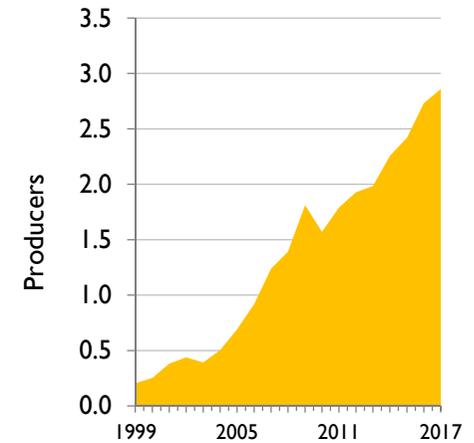
More than 84% of the producers are in Asia, Africa, and Latin America.



Distribution of organic producers by region 2017



There has been an increase in the number of producers by almost 127'500, or over 5% since 2016.

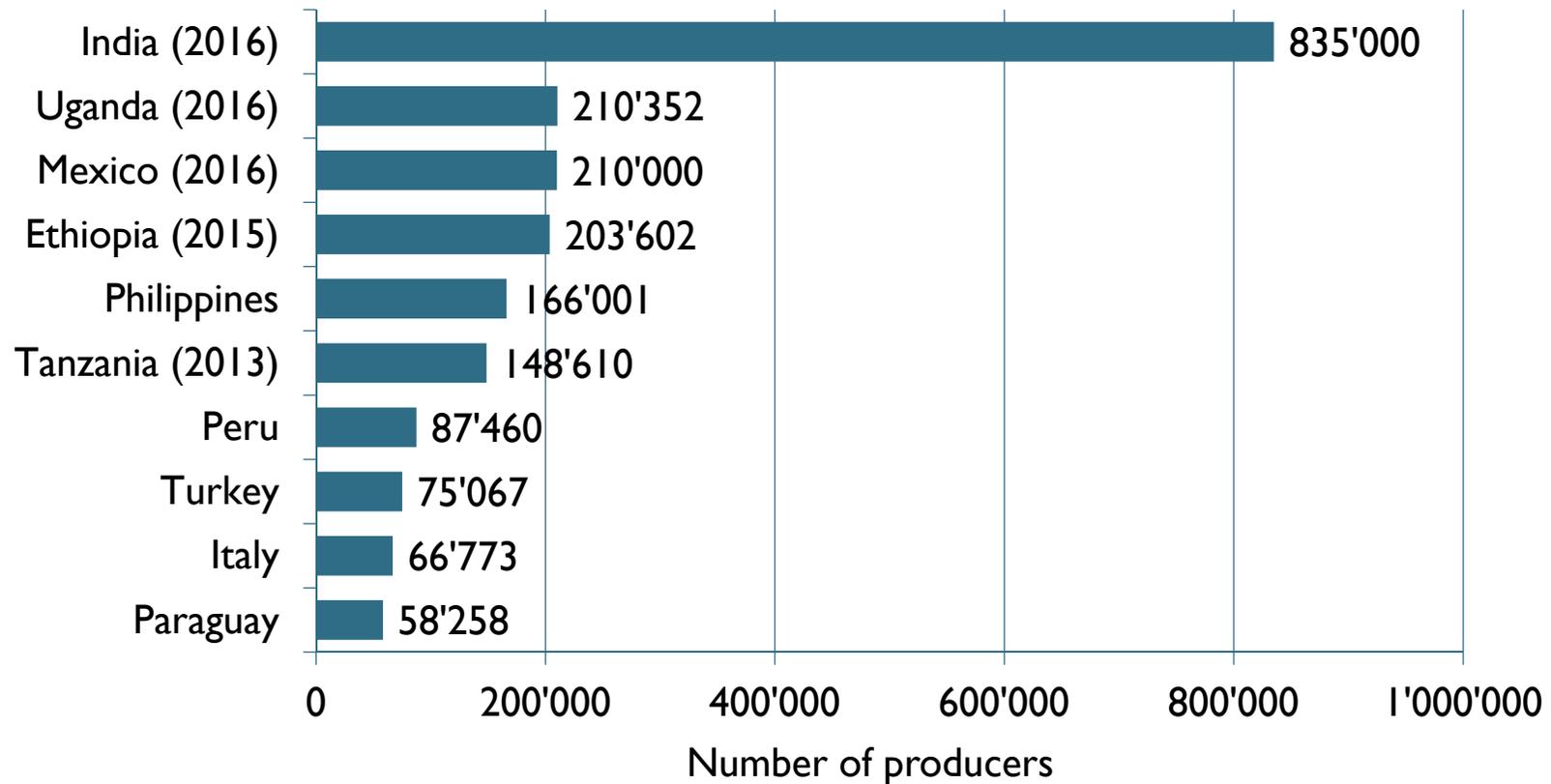


Development of the number of organic producers 1999-2017

# World: Organic producers 2017

## The ten countries with the largest numbers of organic producers 2017

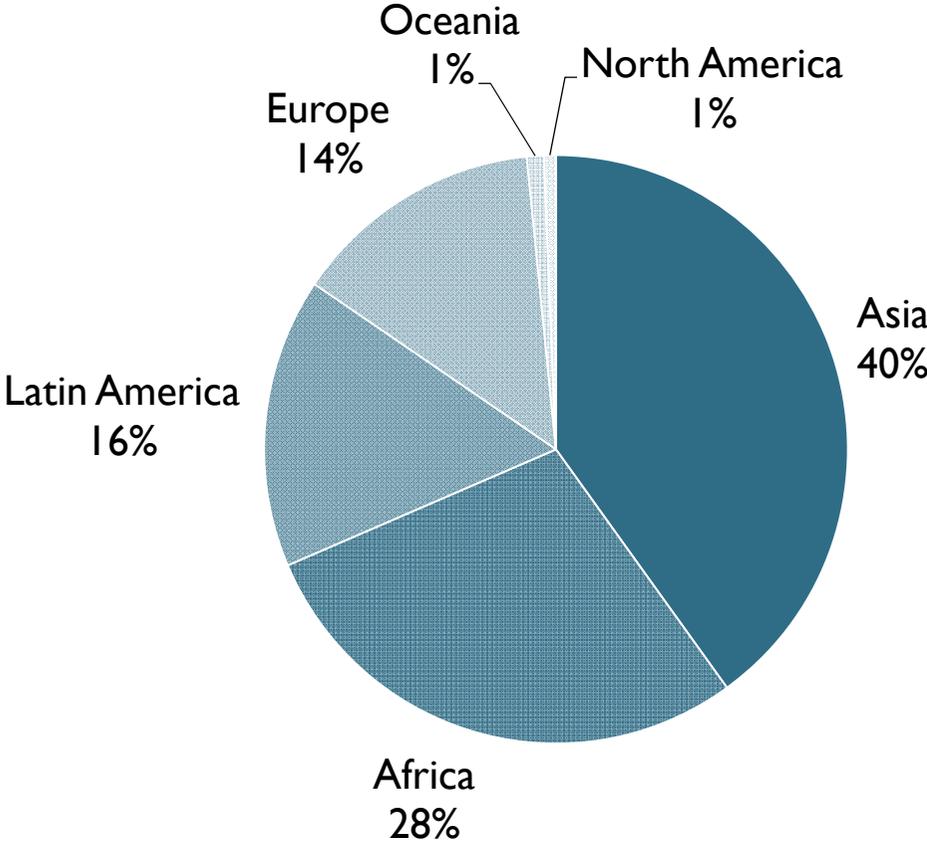
Source: FiBL survey 2019



# World: Organic producers by region 2017

## Distribution of organic producers by region 2017

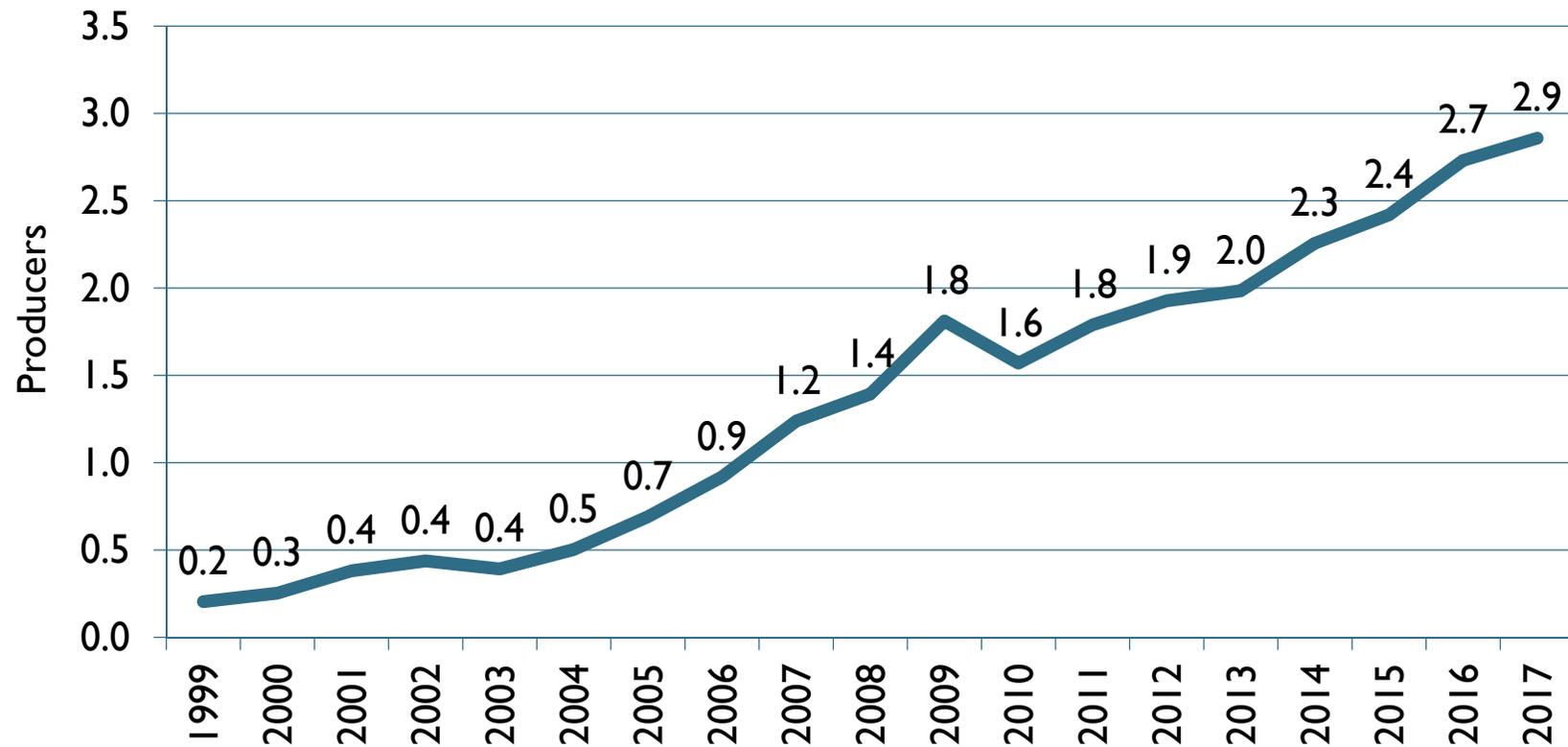
Source: FiBL survey 2019



# World: Development of organic producers 1999-2017

## Development of the number of organic producers 1999-2017

Source: FiBL-IFOAM-SOEL-Surveys 1999-2019



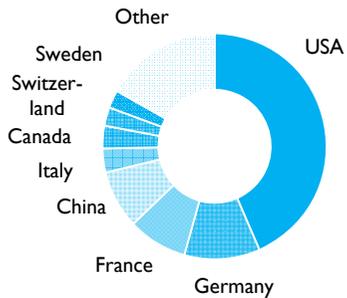
# World: The global market for organic food and beverages 2017

- In 2017, the global market for certified organic food and drink was reached 92.1 billion euros.
- The turnover with organic products has more than trebled since 2000.
- Over eighty percent of the organic product revenues is made in the North America and Europe.
- In 2017, the largest market by far was the United States with 40 billion euros of organic food sales, followed by Germany with 10 billion euros and France with 7.6 billion euros.
- The highest annual per capita consumption was in Switzerland (288 euros) and in Denmark (278 euros).
- Denmark, Sweden and Switzerland have the highest share of organic food sales. In 2017 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.

# WORLD: ORGANIC RETAIL SALES 2017



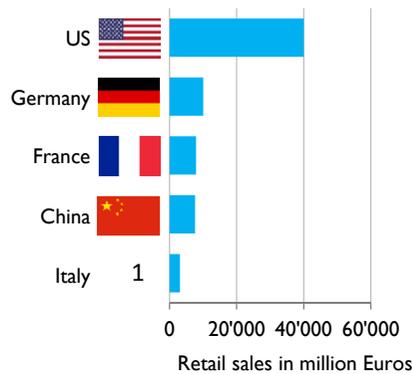
The largest single market is the USA followed by the EU (34.3 billion €) and China. By region, North America has the lead (43 billion €), followed by Europe (37.3 billion €) and Asia.



Distribution of retail sales value by country 2017



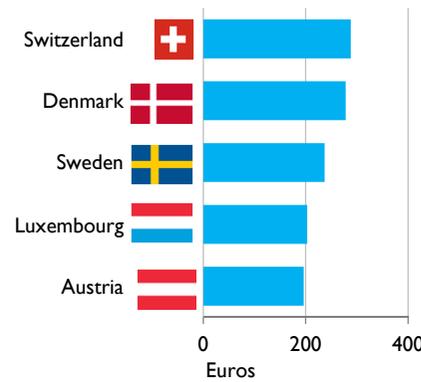
The countries with the largest market for organic food are the United States (40 billion €), followed by Germany (10 billion €), France (7.9 billion €) and China (7.6 billion €).



The five countries with the largest markets for organic food 2017



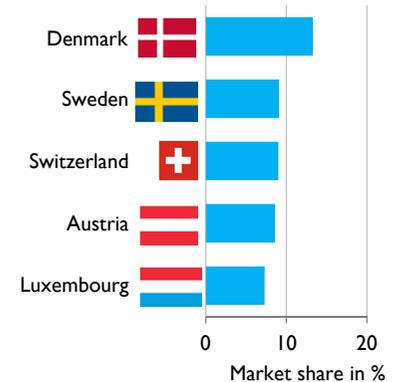
Switzerland has the highest per capita consumption worldwide, followed by Denmark and Sweden.



The five countries with the highest per capita consumption 2017



The highest shares the organic market of the total market is in Denmark, followed by Sweden, Switzerland, Austria, and Luxembourg.

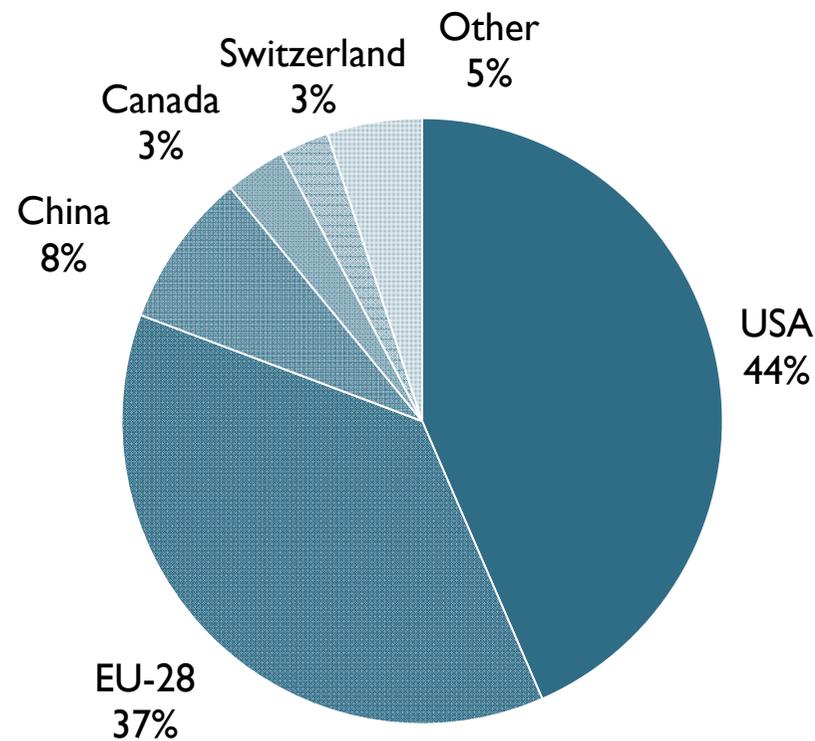


The five countries with the highest organic shares of the total market 2017

# World: Global market: Distribution of retail sales by single market 2017

## World: distribution of retail sales by single market 2017

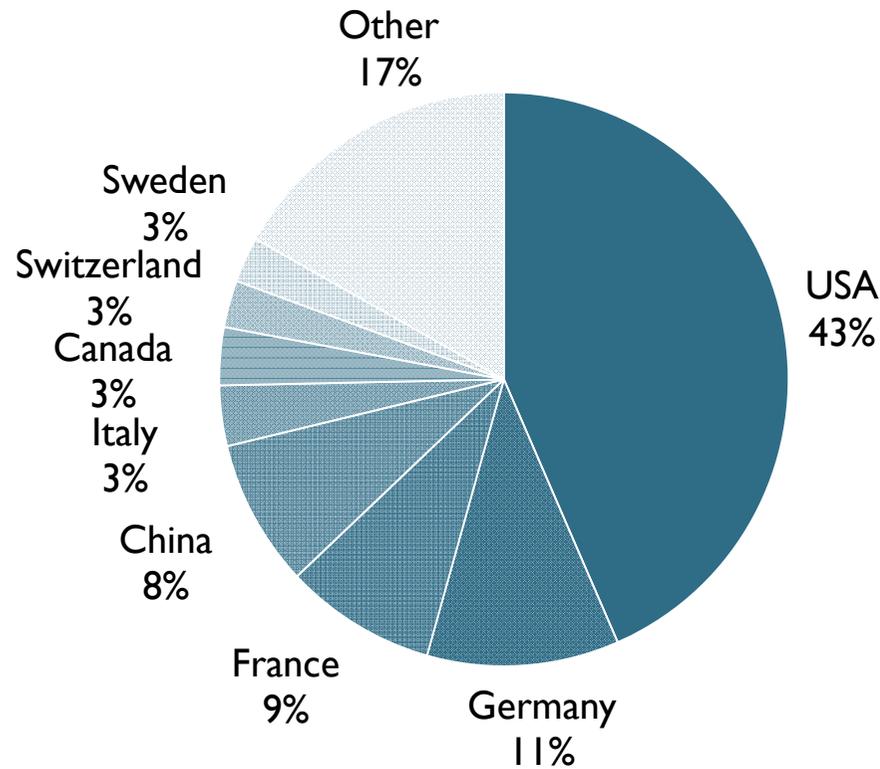
Source: FiBL-AMI survey 2019



# World: Distribution of organic retail sales 2017

## Global market: Distribution of retail sales value by country 2017

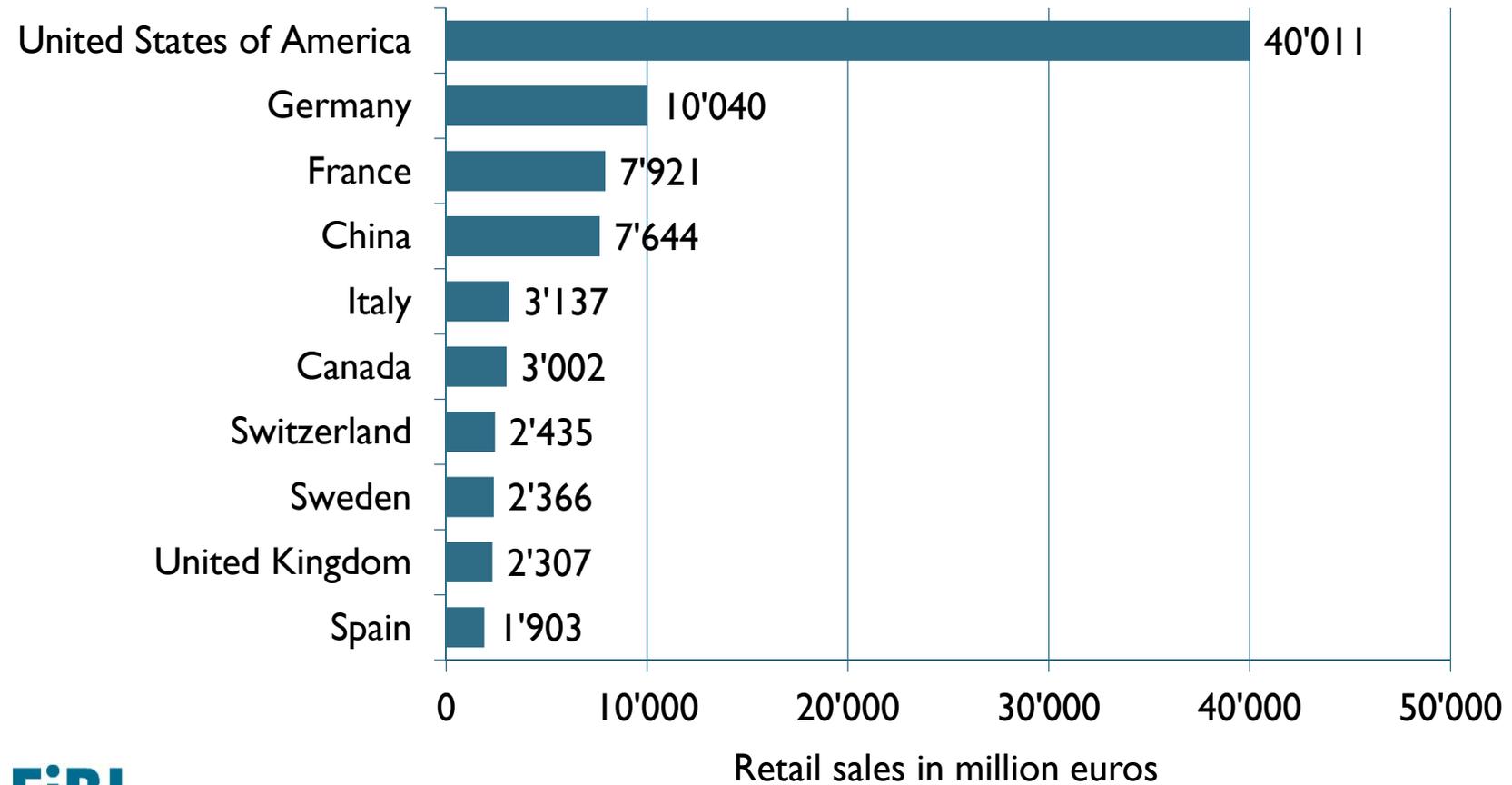
Source: FiBL-AMI survey 2019, based on retail sales with organic food



# World: The largest markets for organic food 2017

## The ten countries with the largest markets for organic food 2017

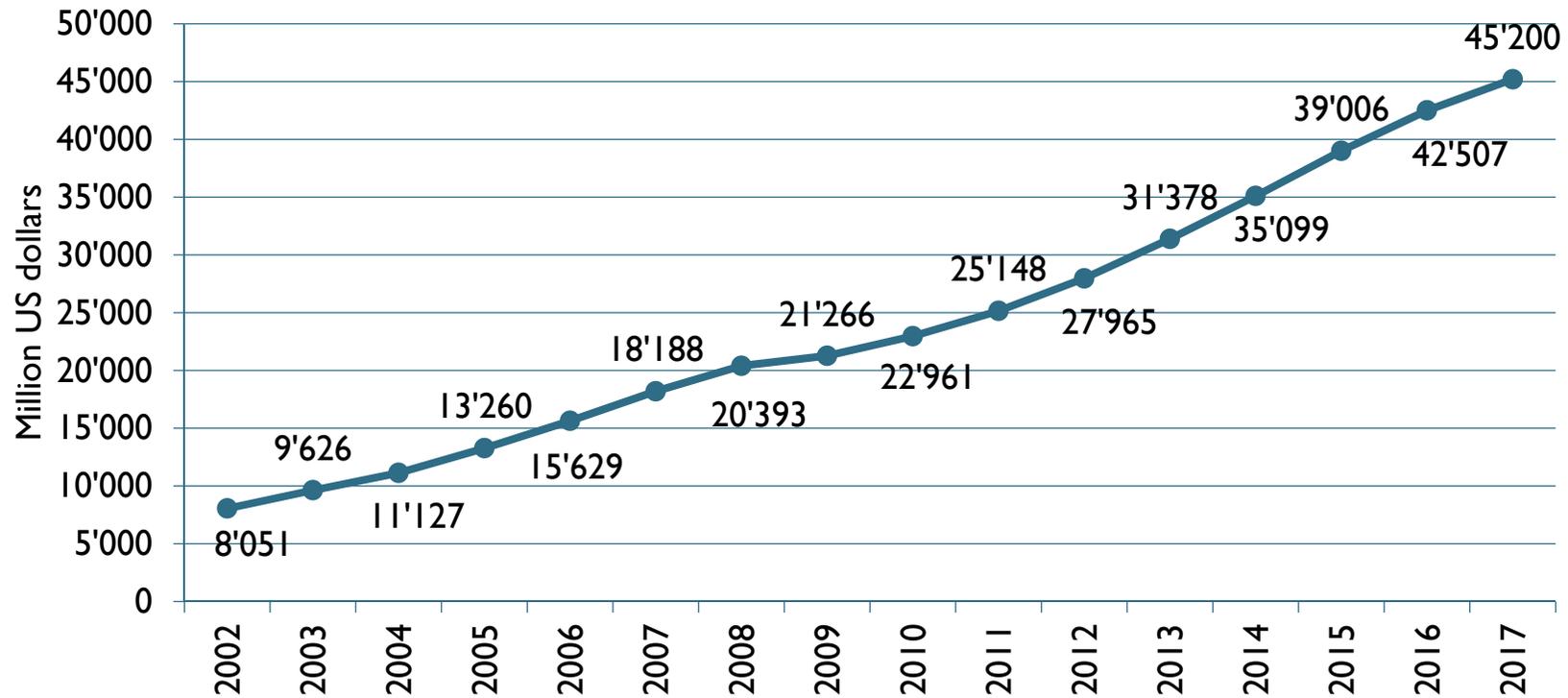
Source: FiBL-AMI survey 2019



# United States of America: Growth of retail sales 2002-2017

## United States of America: Growth of organic food and beverages retail sales 2002-2017

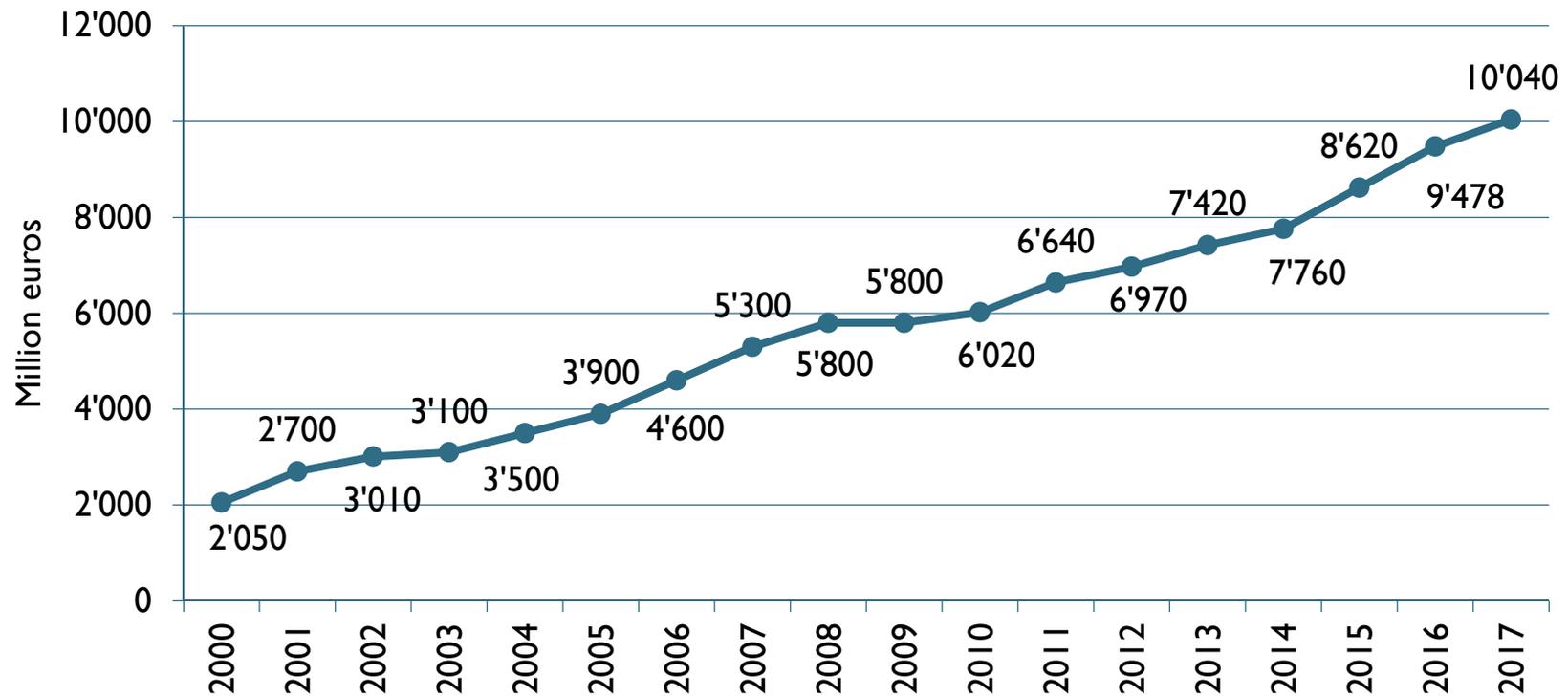
Source: OTA 2000-2019



# Germany: Growth of retail sales 2000-2017

## Germany: Growth of organic food and beverages retail sales 2000-2017

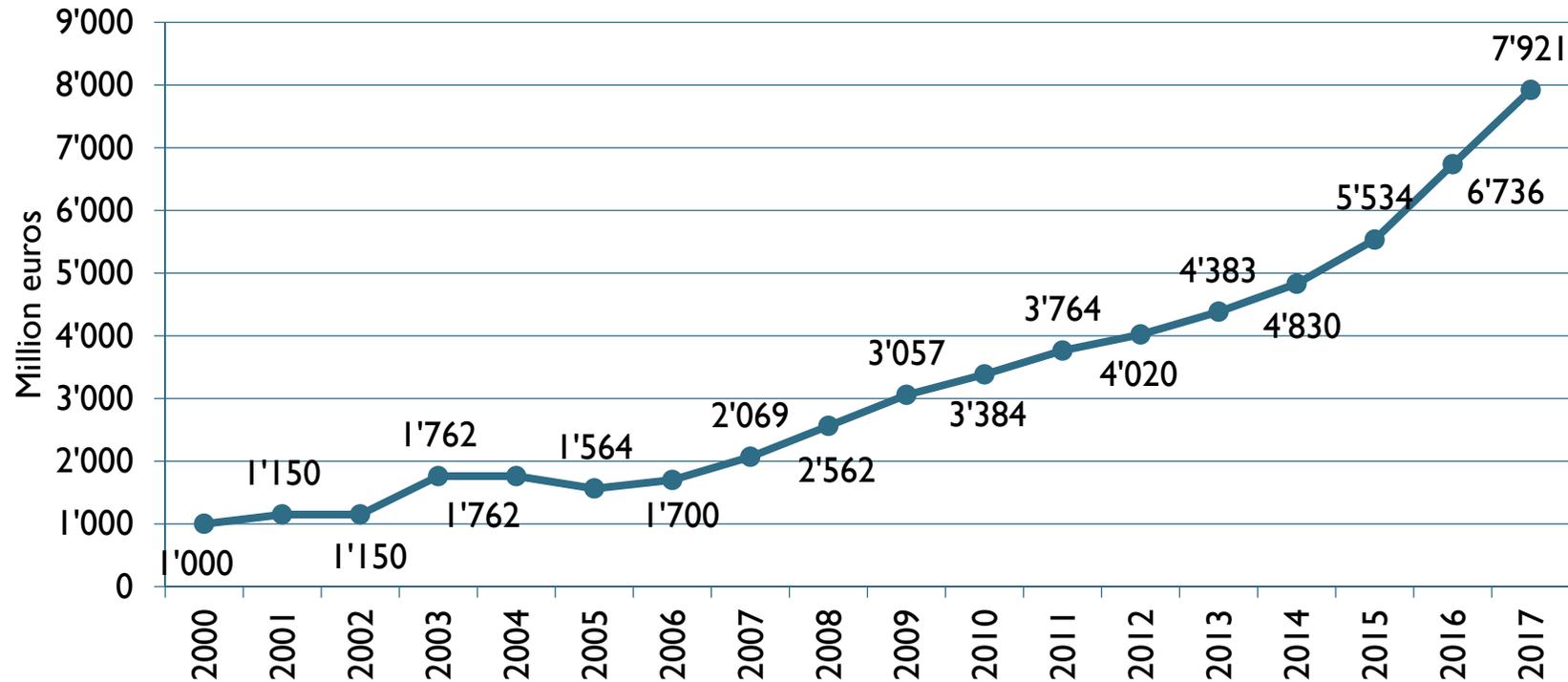
Source: FiBL-AMI surveys 2000-2019



# France: Growth of retail sales 2000-2017

## France: Growth of organic food and beverages retail sales 2000-2017

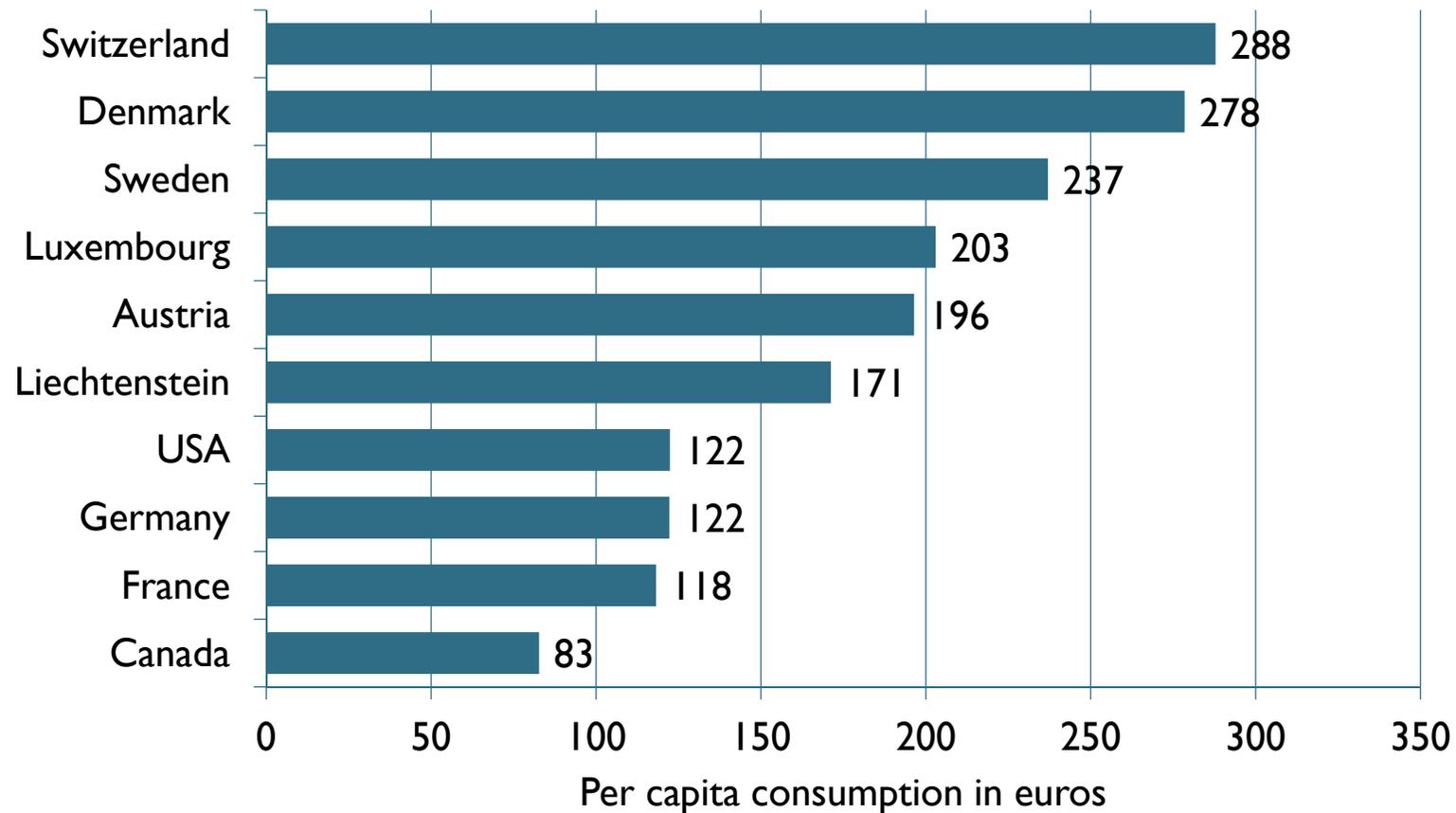
Source: FiBL-AMI surveys 2000-2019



# World: Per capita consumption 2017

## The ten countries with the highest per capita consumption 2017

Source: FiBL-AMI survey 2019



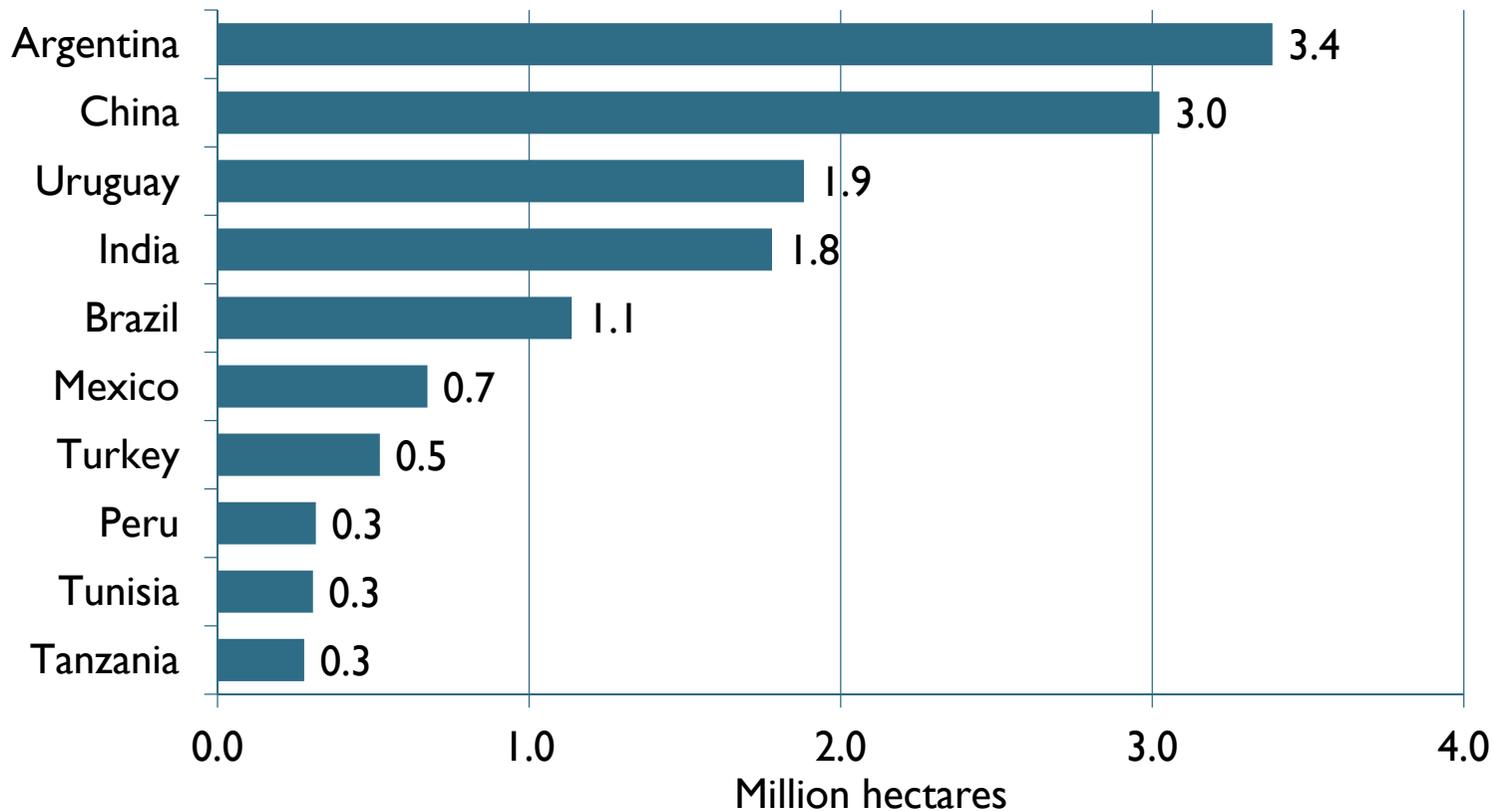
## World: Organic farming in the DAC countries 2017

- Almost a quarter of the world's organic agricultural land – 16.8 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.
- 2.5 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.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC\\_List\\_ODA\\_Recipients2018to2020\\_flows\\_En.pdf](http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC_List_ODA_Recipients2018to2020_flows_En.pdf)

# World: DAC list: The top 10 countries with the largest areas of organic agricultural land 2017

## The ten countries on the DAC list with the largest areas of organic agricultural land 2017

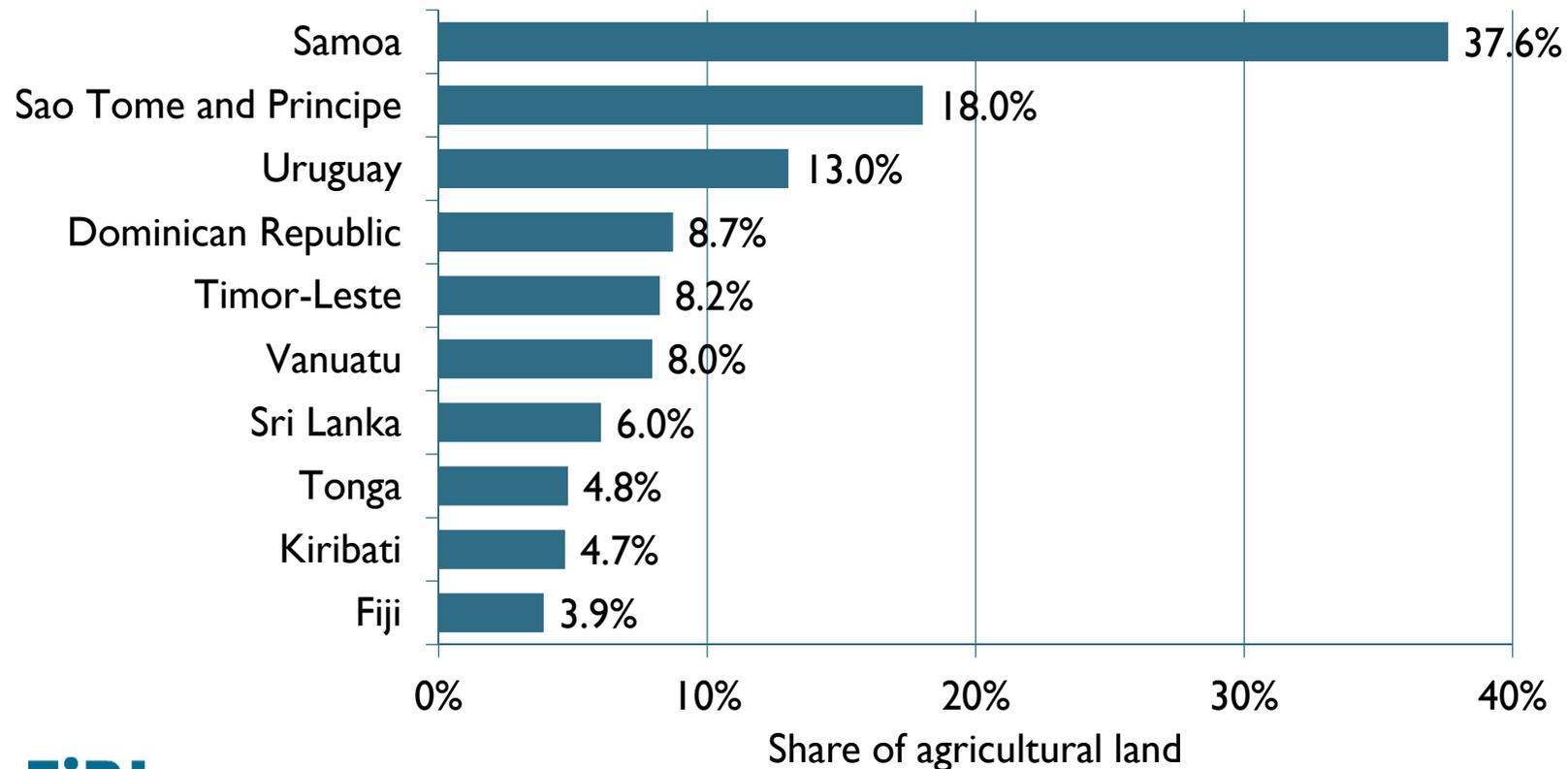
Source: FiBL survey 2019



# World: DAC list: The top 10 countries with the highest shares of organic agricultural land 2017

## The ten countries on the DAC list with the highest organic shares of the total agricultural land 2017

Source: FiBL survey 2019



## More information

More information (PDF, data sources, graphs) at <http://www.organic-world.net/yearbook/yearbook-2019.html>

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## Disclaimer

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