



Organic Agriculture Worldwide: Key results from the FiBL survey on organic agriculture worldwide 2020

Part I: Global data and survey background

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

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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 2020 in FiBL & IFOAM – Organics International (2020): The World of Organic Agriculture. Statistics and Emerging Trends 2020. Frick and Bonn
 - For updates, check www.organic-world.net
 - This presentation is available online at: <http://www.organic-world.net/yearbook/yearbook2020/slide-presentations.html>
 - Texts and graphs: Helga Willer, Bernhard Schlatter, Jan Trávníček, Laura Kemper and Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland
 - Contact: Helga Willer, helga.willer@fibl.org, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland
- © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February 2020

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 2020

* See also disclaimer on last page of this slide show

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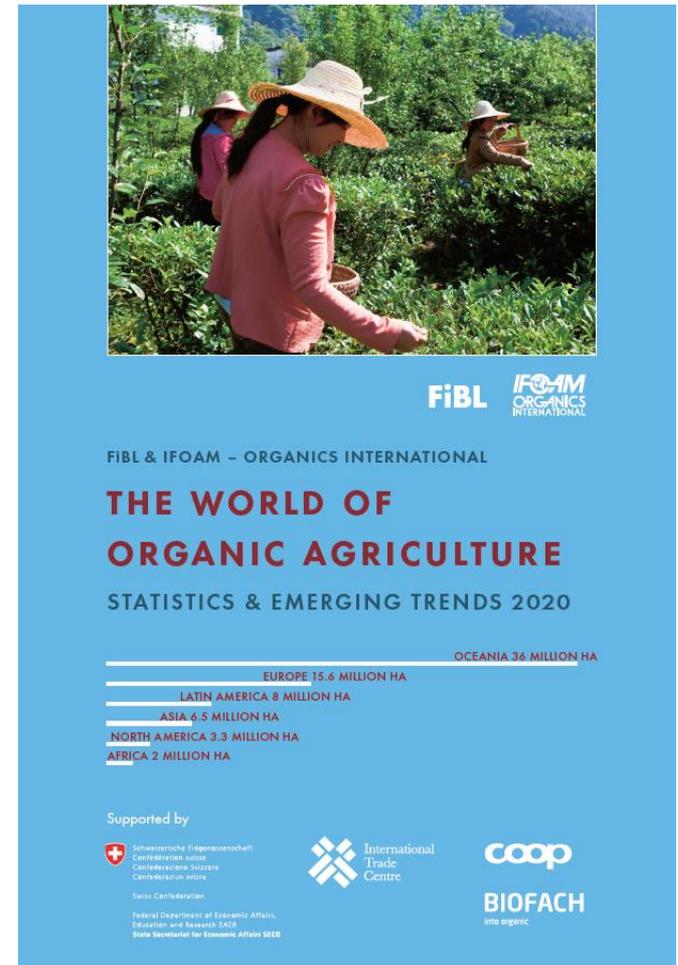
www.fibl.org

The World of Organic Agriculture 2020

The 21st edition of “The World of Organic Agriculture”, was published by FiBL and IFOAM in February 2020.*

- 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.
 - The book can be ordered via IFOAM.bio and shop.FiBL.org.

* Willer, Helga, Bernhard Schlatter, Jan Trávníček, Laura Kemper and Julia Lernoud (Eds.) (2020): The World of Organic Agriculture. Statistics and Emerging Trends 2020. Research Institute of Organic Agriculture (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

The screenshot shows the website's header with the title "Organic World" and the subtitle "Global organic farming statistics and news". The navigation menu includes "Home / News", "About", "Statistics", "Yearbook", "Country info", "Export Info", "Q&A", "Link library", "Contact / Site info", and "Privacy policy". The "Yearbook" tab is active. Below the navigation, there is a list of editions from 2020 down to 2000-2007. The 2020 edition is highlighted, with a link to "Table of contents BIOFACH 2020". The main content area features the title "The World of Organic Agriculture 2020" and a sub-heading "2020 edition of 'The World of Organic Agriculture'". A text block states: "The 2020 edition of 'The World of Organic Agriculture' will be launched on February 12, 2020 at BIOFACH in Nürnberg, Germany." Below this, there is a "Contents" section with links to "Table of contents" and "BIOFACH 2020". On the right side, there is a section titled "The World of Organic Agriculture 2020" with a small image of a person in a field and a list of links: "Key data - Table of contents - Press releases - Order book - Infographics - Presentations - Data tables - PDF version - BIOFACH 2020 - Corrigenda". At the bottom of the page, there is a search bar with the text "Search".

About this presentation

There are 3 presentations summarizing the key results of the FiBL survey on organic agriculture worldwide 2020 (data 2018). Apart from the global data, key results on crop and on regional data are presented.

More information is available at www.organic-world.net

The following three presentations are available at <http://www.organic-world.net/yearbook/yearbook2020/slide-presentations.html>:

- Part 1: Global data from 2018 and survey background
- Part 2: Land use and key crops in organic agriculture in 2018
- Part 3: Organic agriculture in the regions in 2018

The 21st survey on organic agriculture worldwide

The 21st 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 2019 and February 2020.

Data were received from 186 countries.

Updated data on area and producers were available for 142 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 2020” and at www.organic-world.net.

Countries covered by the survey on organic agriculture 2018

World: Organic agricultural land (including in-conversion areas) and regions' shares of the global organic agricultural land 2018

Region	Organic agricultural land [hectares]	Regions' shares of the global organic agricultural land
Africa	2'003'976	3%
Asia	6'537'226	9%
Europe	15'635'505	22%
Latin America	8'008'581	11%
North America	3'335'002	5%
Oceania	35'999'373	50%
World*	71'514'583	100%

Source: FiBL survey 2020. Note: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest, and non-agricultural grazing areas.

*Includes correction value for French overseas departments

International certifiers that provided data for several countries



Soil Association

FiBL

www.fibl.org

Networks, transnational data collection efforts



CIHEAM



General notes on the data

Data sources: For data sources see annex of The World of Organic Agriculture 2020 or 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 2018

Organic Farmland 2018



71.5 m ha Organic farmland in million hectares

+2.9% From 2017

186 Countries with organic farming

Top 3 countries (land in million of hectares)



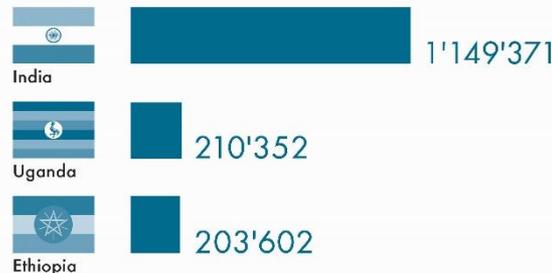
Organic Producers 2018

The number of organic producers is increasing

2.8 million Organic farmers

+55% From 2009

Number of producers: Top 3 countries



Organic Market 2018

The global market is growing and consumer demand is increasing

Almost 97 Global organic food market in billion euros

Top 3 countries (market in billion euros)



15.4% Organic market growth

11.5% Market share

312 € Highest per capita spending is in Denmark and Switzerland

Source: FiBL survey based on national sources

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More information: www.organic-world.net - statistics.fibl.org

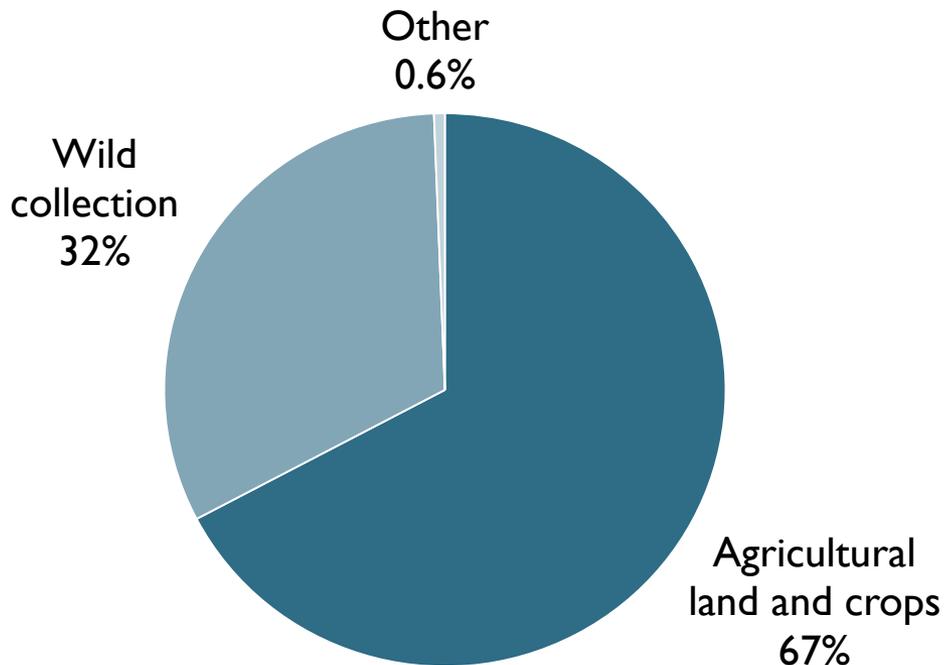
Key data/indicators on organic agriculture worldwide 2018

- 186 countries have data on organic agriculture.
- 71.5 million hectares of agricultural land are organic (including in-conversion areas).
- 16 countries have ten percent organic agricultural land or more, and 15 countries have between 5 and 10 percent organic agricultural land.
- There are almost 36 million hectares of further organic non-agricultural areas.
- 2.8 million producers were reported.
- Global organic market reached 96.7 billion euros.

World: Distribution of organic areas 2018

Distribution of all organic areas in 2018

Source: FiBL survey 2020



- Agricultural land (71.5 million hectares in 2018)
 - Cropland
 - **Arable land** (cereals, green fodders, oilseeds, etc.)
 - **Permanent crops** (olives, nuts, coffee, etc.)
 - **Cropland, no details** (arable land and permanent crops with no further details)
 - Permanent grassland
 - Other agricultural land
- Non-agricultural areas (35.7 million hectares in 2018)
 - Wild collection/Bee keeping (35.1 million hectares)
 - Forest
 - Aquaculture
 - Grazing areas on non-agricultural land

World: Organic agricultural land by region 2018

Currently 71.5 million hectares are under organic agricultural management (end of 2018 for most data).

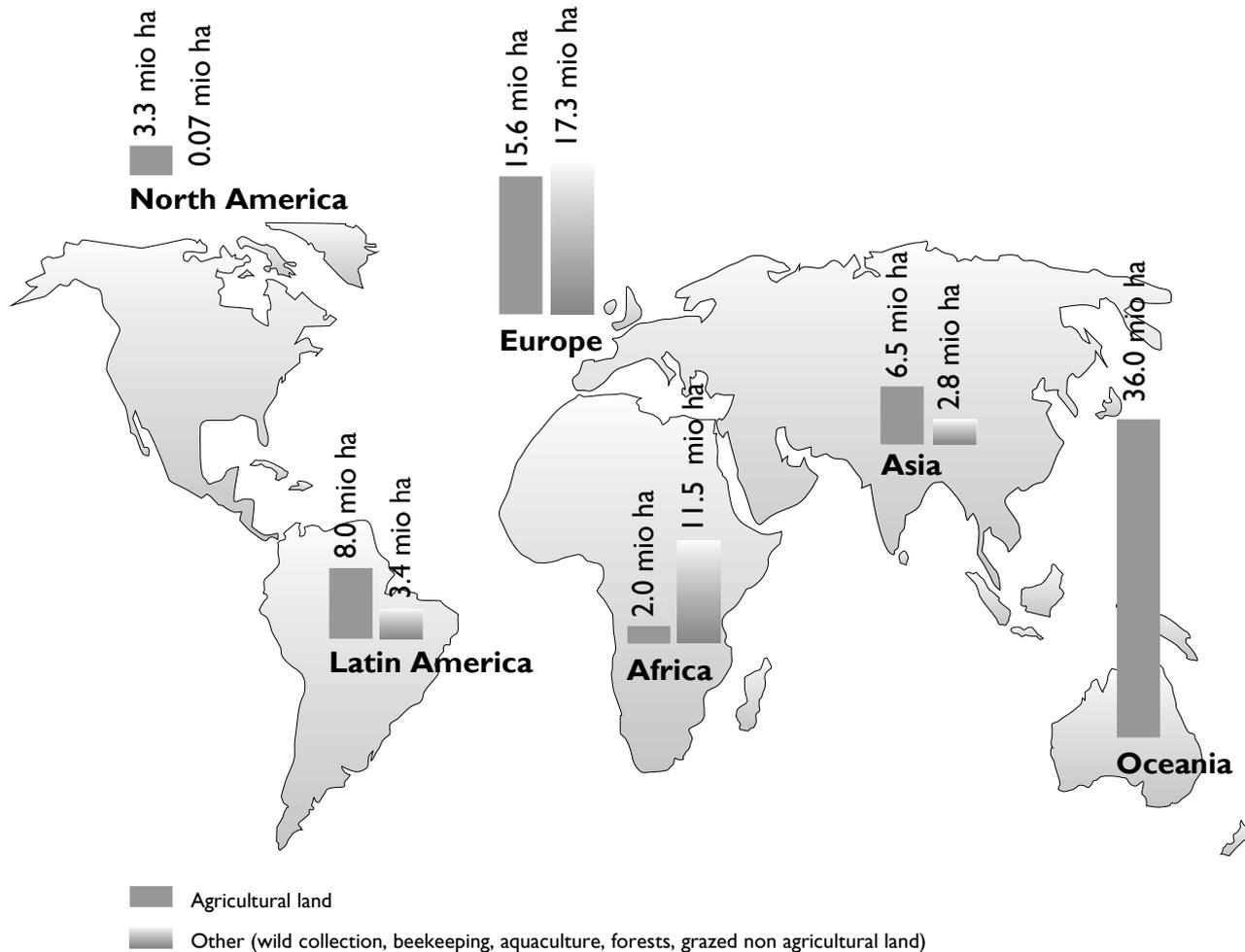
The distribution of the organic agricultural land is as follows:

- Oceania (16.0 million hectares);
- Europe (15.6 million hectares);
- Latin America (8.0 million hectares);
- Asia (6.5 million hectares);
- North America (3.3 million hectares);
- Africa (2.0 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 22 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 35.7 million hectares.

World: Organic agricultural land and other organic areas 2018



ORGANIC FARMLAND 2018

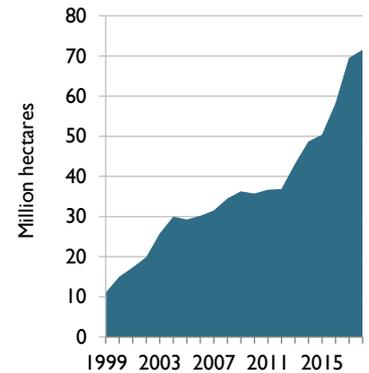
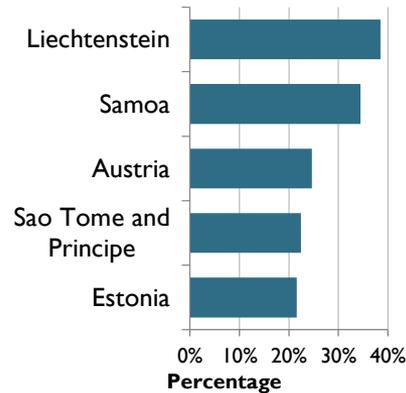
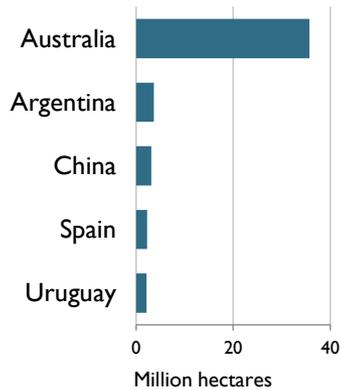
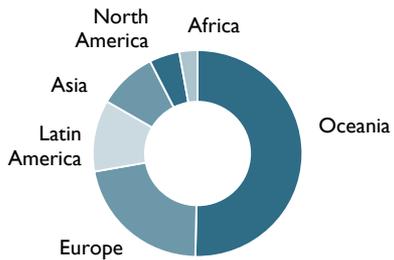


In Oceania there were 36 Mio ha, in Europe 15.6 Mio ha, and in Latin America 8.0 Mio ha.

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

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

In 2018, over 2.0 million hectares more were reported compared with 2017.



Distribution of organic agricultural land by region 2018

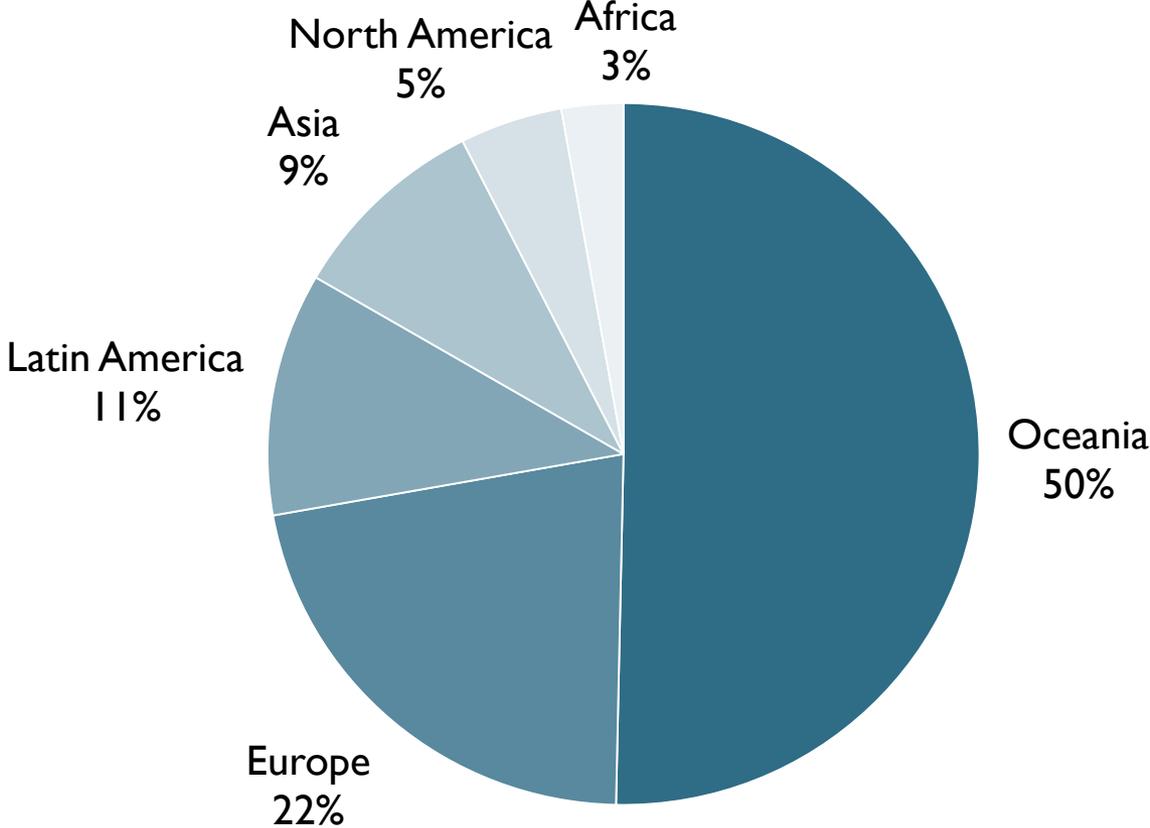
The five countries with the largest areas of organic agricultural land 2018

Top 5 countries with more than 10 percent of organic agricultural land 2018

Growth of the organic agricultural land 1999-2018

Distribution of organic agricultural land by region 2018

Source: FiBL survey 2020



World: The countries with the most organic agricultural land 2018

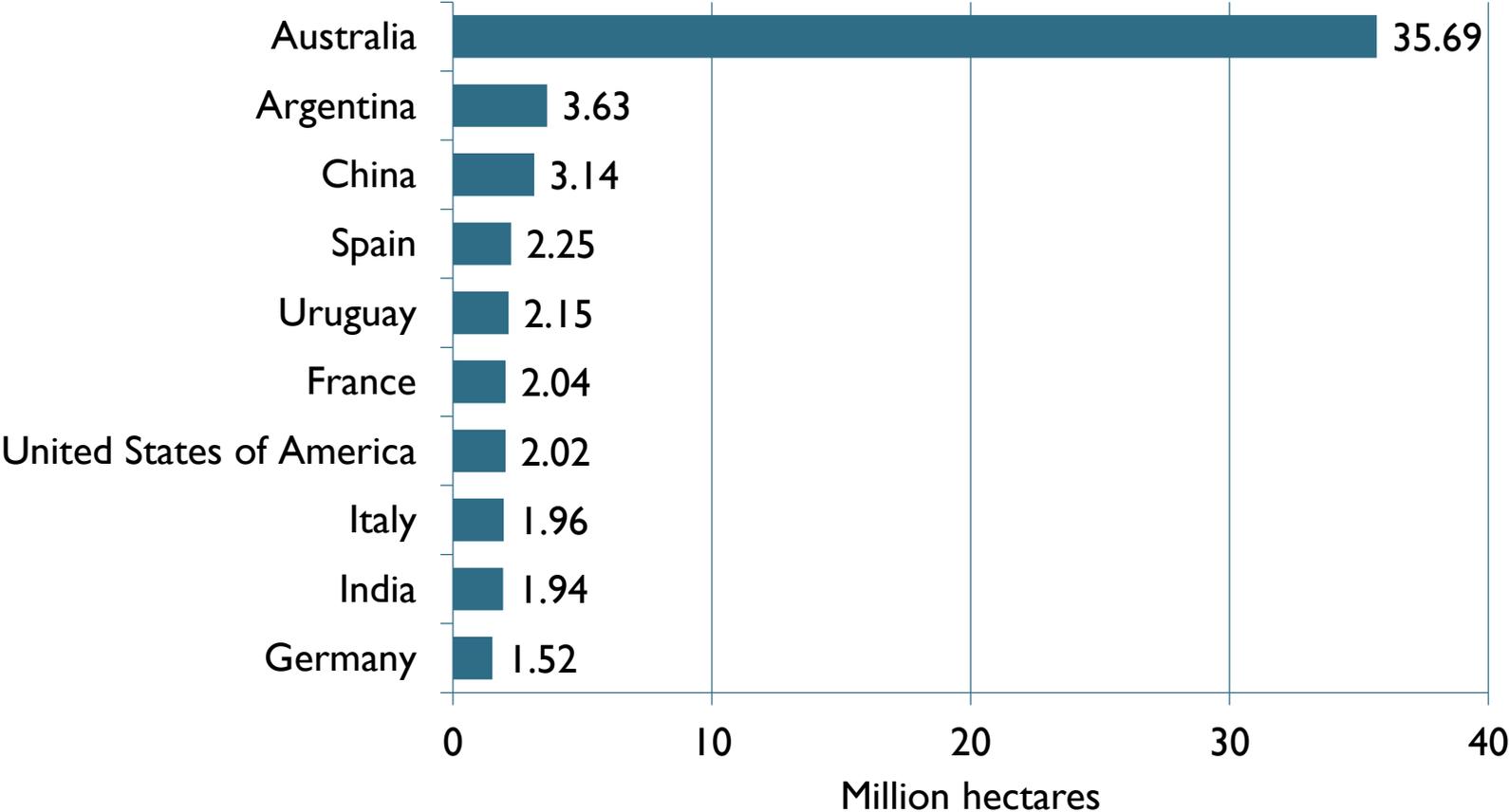
Australia is the country with the most organic agricultural land, 97 percent of which is estimated to be extensive grazing area.

Argentina is second, followed by China in third place.

The ten countries with the most organically managed agricultural land have a combined total of 56 million hectares and constitute three-quarters of the world's organic agricultural land.

The ten countries with the largest areas of organic agricultural land 2018

Source: FiBL survey 2020



World: Share of organic land of total agricultural area 2018

1.5 percent of the global agricultural land is organic.

By region, the share is highest in Oceania (8.6 percent), followed by Europe with 3.1 percent and Latin America with 1.1 percent.

In the European Union, the share of organically managed land is 7.7 percent. In the other regions, the share of organically managed land is less than one percent.

Sixteen countries have 10 percent organic land or more, and 15 countries have between 5 and 10 percent organic land.

However, almost 57 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 (38.5 percent), followed by the Samoa (34.5 percent) and Austria (24.7 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 2018

World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2018

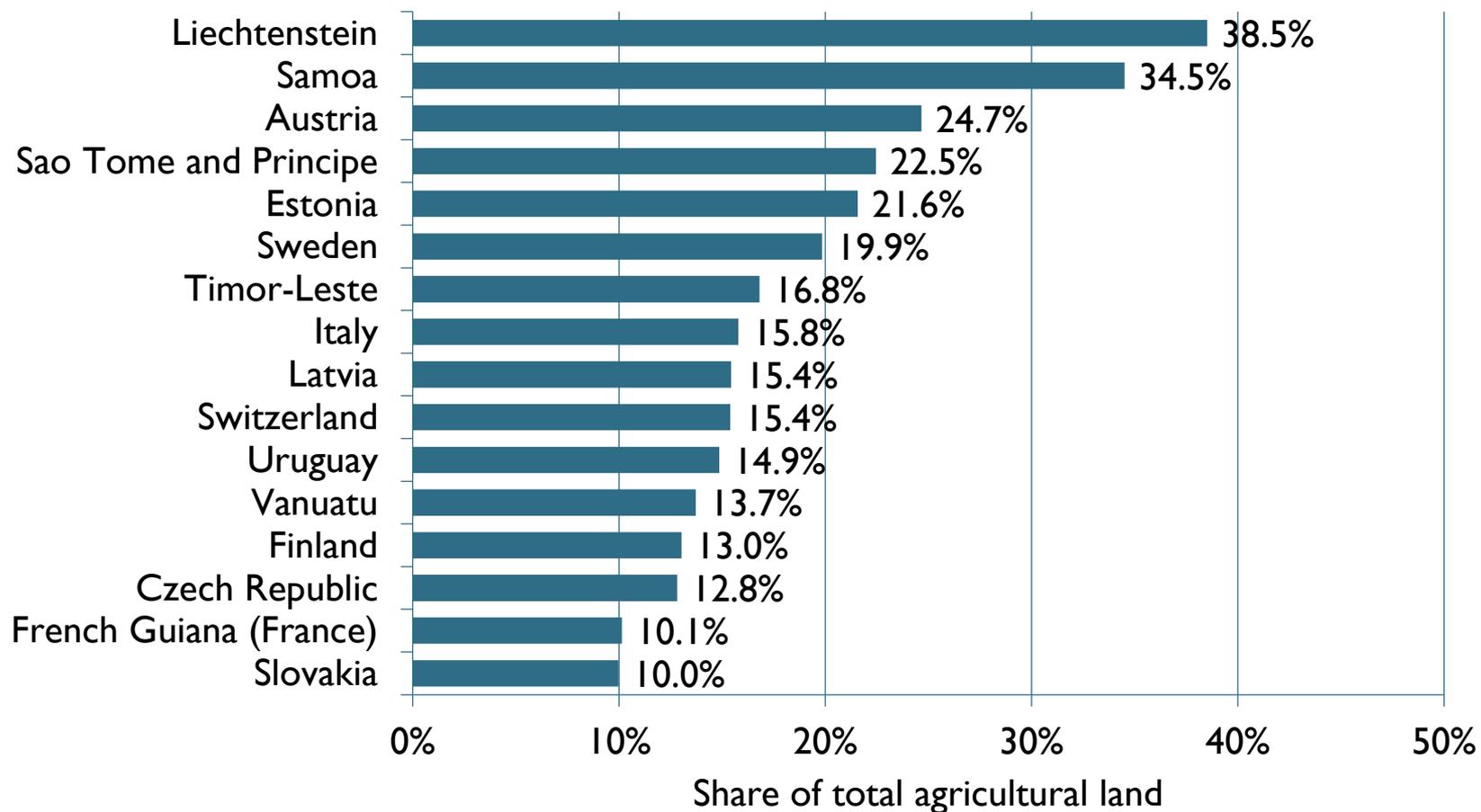
Region	Organic agr. land [ha]	Share of total agri. land
Africa	2'003'976	0.2%
Asia	6'537'226	0.4%
Europe	15'635'505	3.1%
Latin America	8'008'581	1.1%
North America	3'335'002	0.8%
Oceania	35'999'373	8.6%
World*	71'514'583	1.5%

Source: FiBL survey 2020.

* Total includes correction value for French overseas departments.

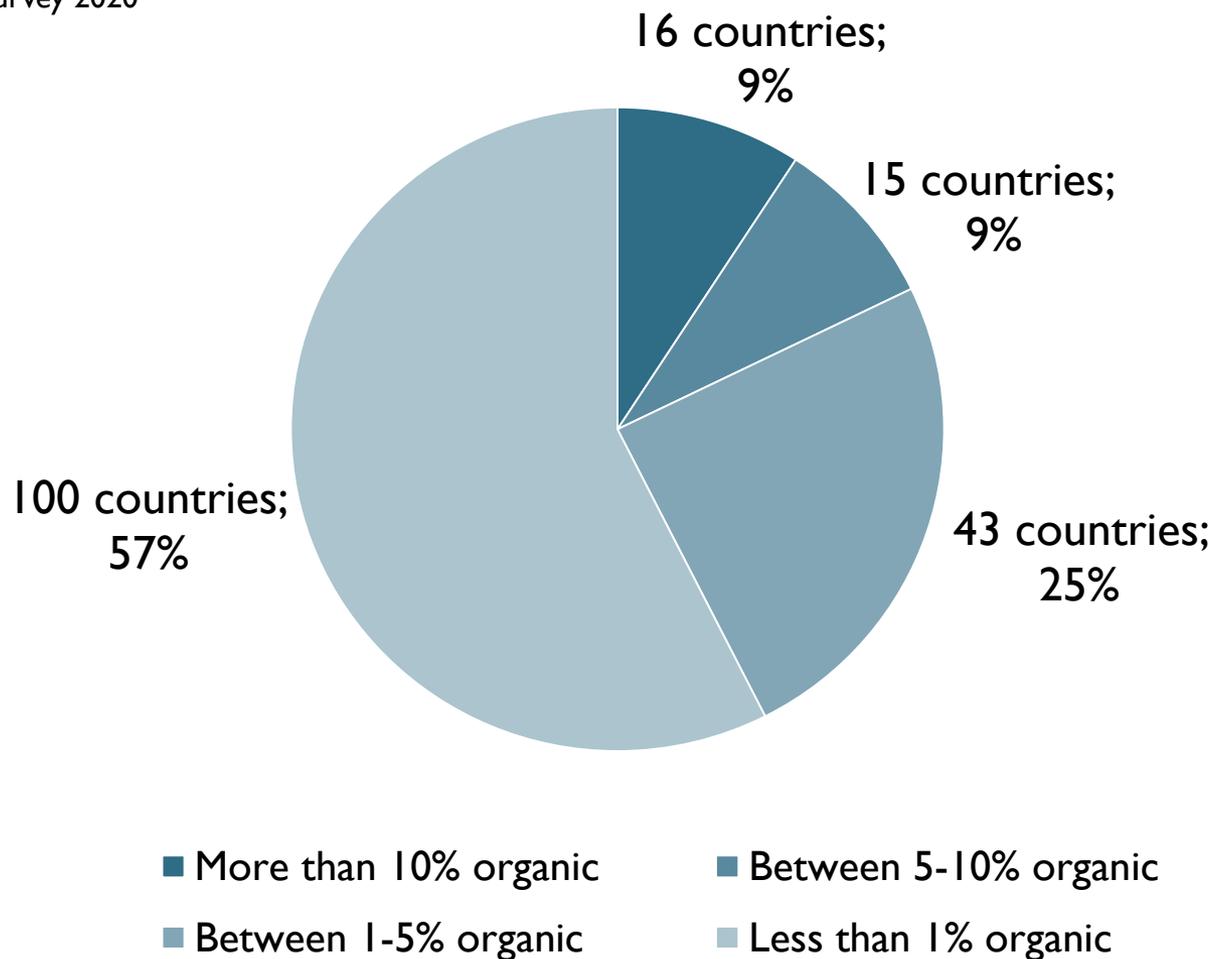
Countries with an organic share of at least 10 percent of the agricultural land 2018

Source: FiBL survey 2020



Distribution of the organic shares of the agricultural land 2018

Source: FiBL survey 2020



World: Growth of the organic agricultural land 2018

Organic agriculture land increased by 2.9% (2.02 million hectares) between 2017 and 2018.

Many countries reported a significant increase, for instance France (16.7 percent increase; over 0.29 million hectares more) and Uruguay (14.1 percent increase; almost 0.26 million hectares more). In addition, Argentina (7.2 percent increase; almost 0.24 million hectares more) and Viet Nam (almost 0.18 million hectares more) reported significant increases.

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

Ninety-eight countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 39 countries. In 41 countries, the organic agricultural area either did not change, or no new data was received.

World: Growth of the organic agricultural land by region

World: Organic agricultural land (including in-conversion areas) by region: growth 2017-2018 and 10 years growth

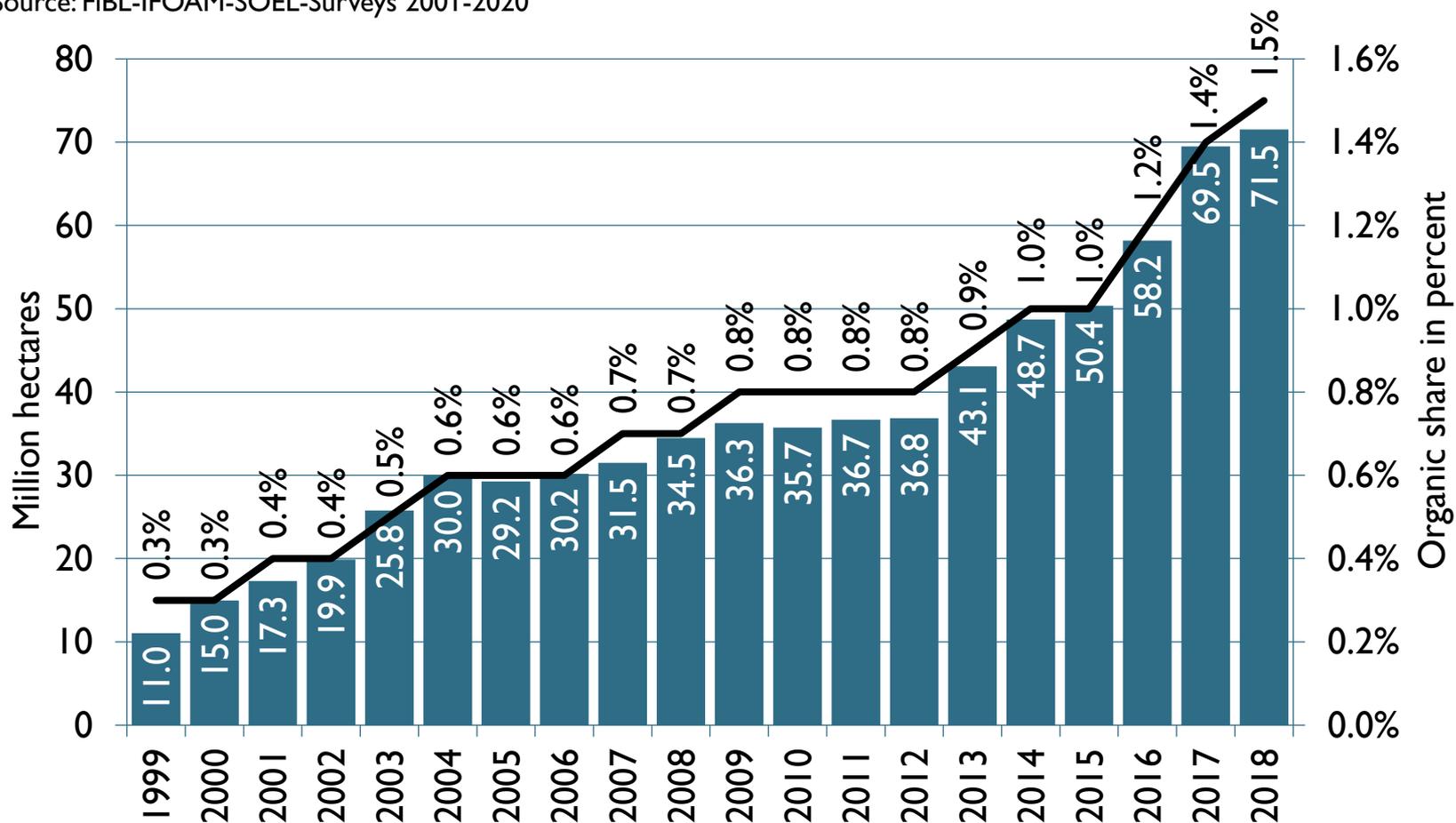
Region	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Africa	1'999'846	2'003'976	+4'130	+0.2%	+1'003'847	+100.4%
Asia	6'002'017	6'537'226	+535'209	+8.9%	+2'956'766	+82.6%
Europe	14'382'480	15'635'505	+1'253'025	+8.7%	+6'406'273	+69.4%
Latin America	7'995'447	8'008'581	+13'134	+0.2%	+348'989	+4.6%
North America	3'223'057	3'335'002	+111'945	+3.5%	+682'377	+25.7%
Oceania	35'894'365	35'999'373	+105'008	+0.3%	+23'847'268	+196.2%
World*	69'492'495	71'514'583	+2'022'327	+2.9%	+35'243'503	+97.2%

Source: FiBL survey 2020, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

* Total includes correction value for French Overseas Departments.

Growth of the organic agricultural land and organic share 1999-2018

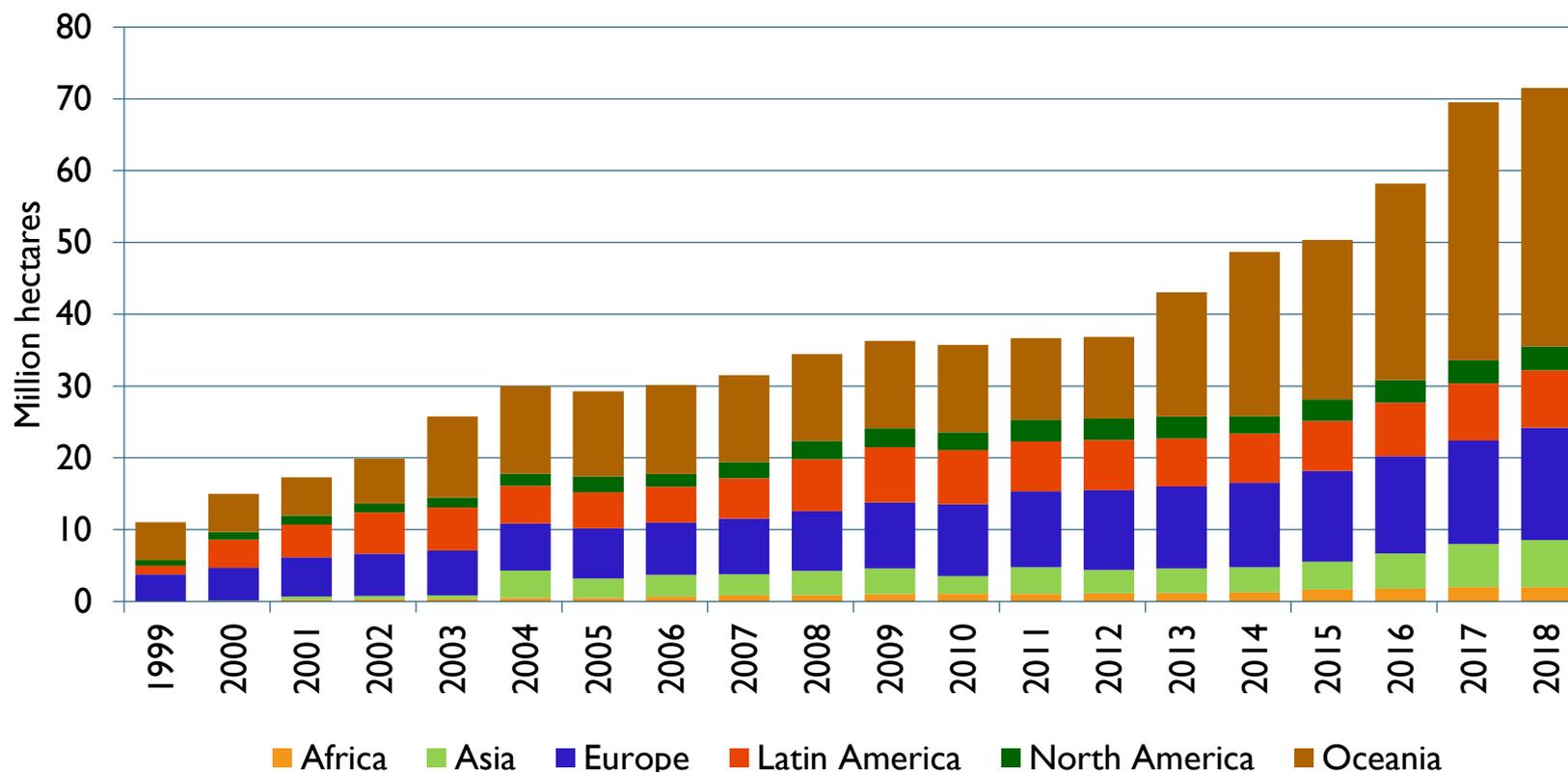
Source: FiBL-IFOAM-SOEL-Surveys 2001-2020



World: Development of organic agricultural land in the regions 2018

Development of organic agricultural land in the regions 1999-2018

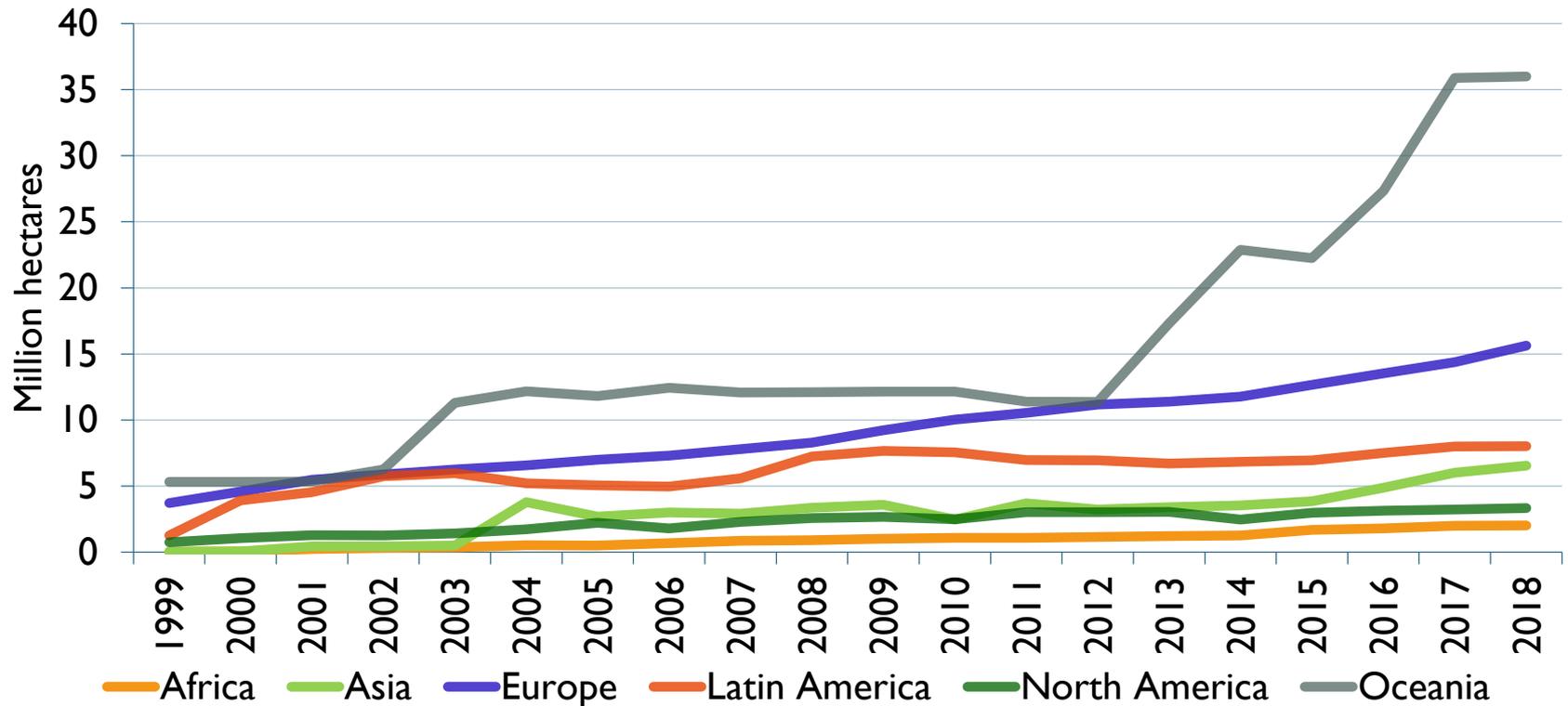
Source: FiBL-IFOAM-SOEL-Surveys 1999-2020



World: Growth of organic agricultural land by region 2018

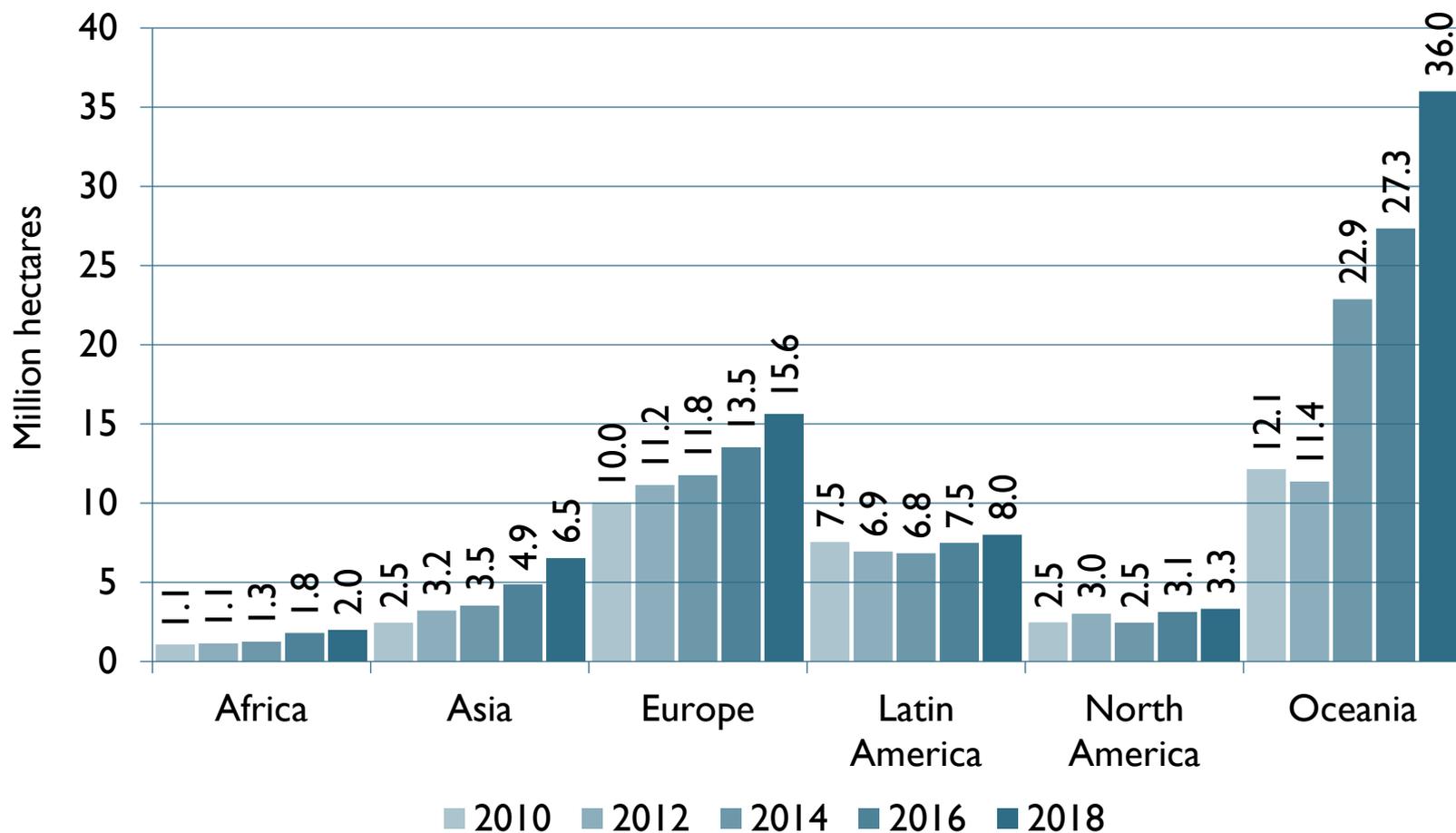
Growth of the organic agricultural land by continent 1999-2018

Source: FiBL-IFOAM-SOEL-Surveys 1999-2020



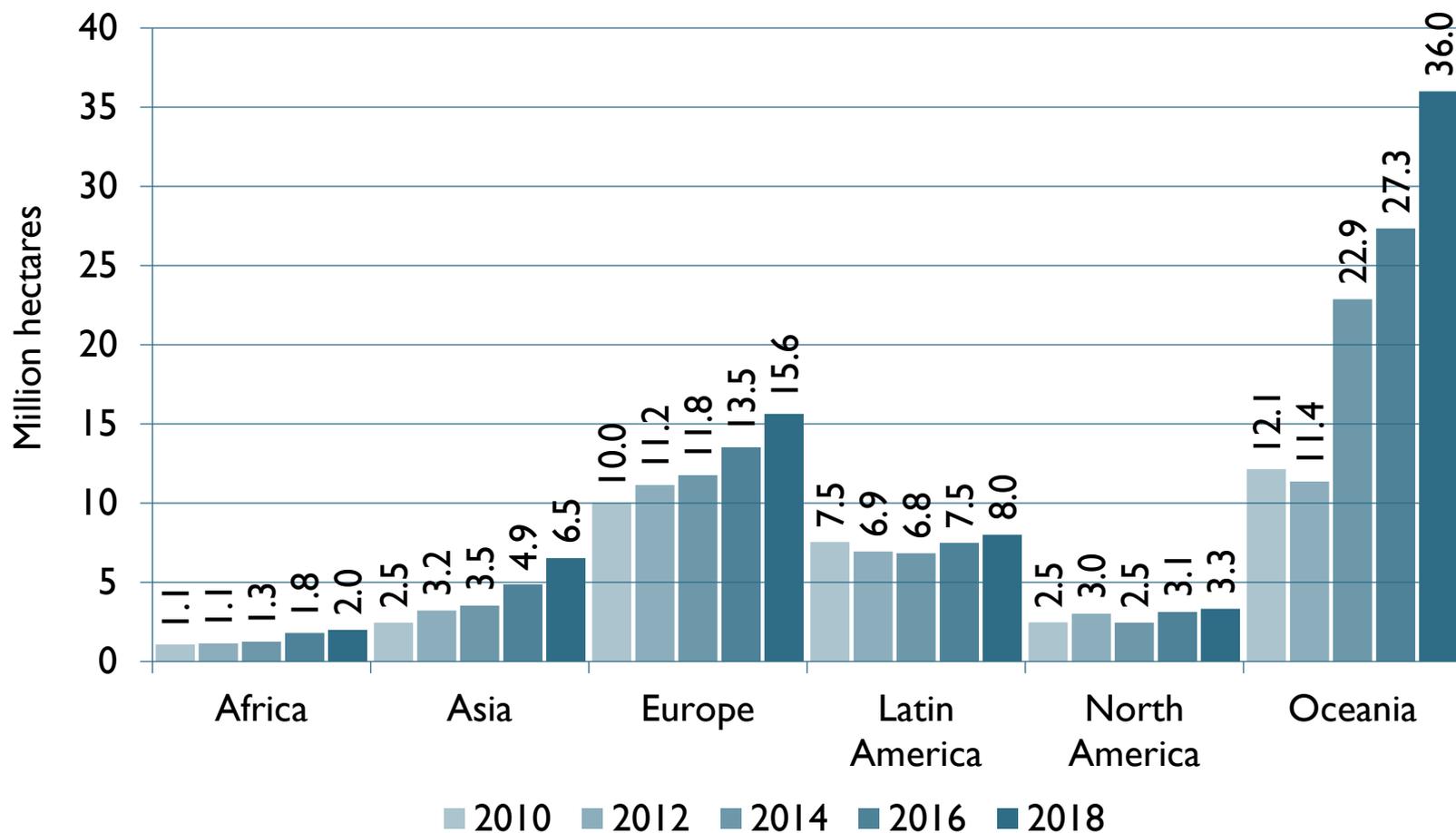
Growth of the organic agricultural land by continent 2010-2018

Source: FiBL-IFOAM survey 2012-2020



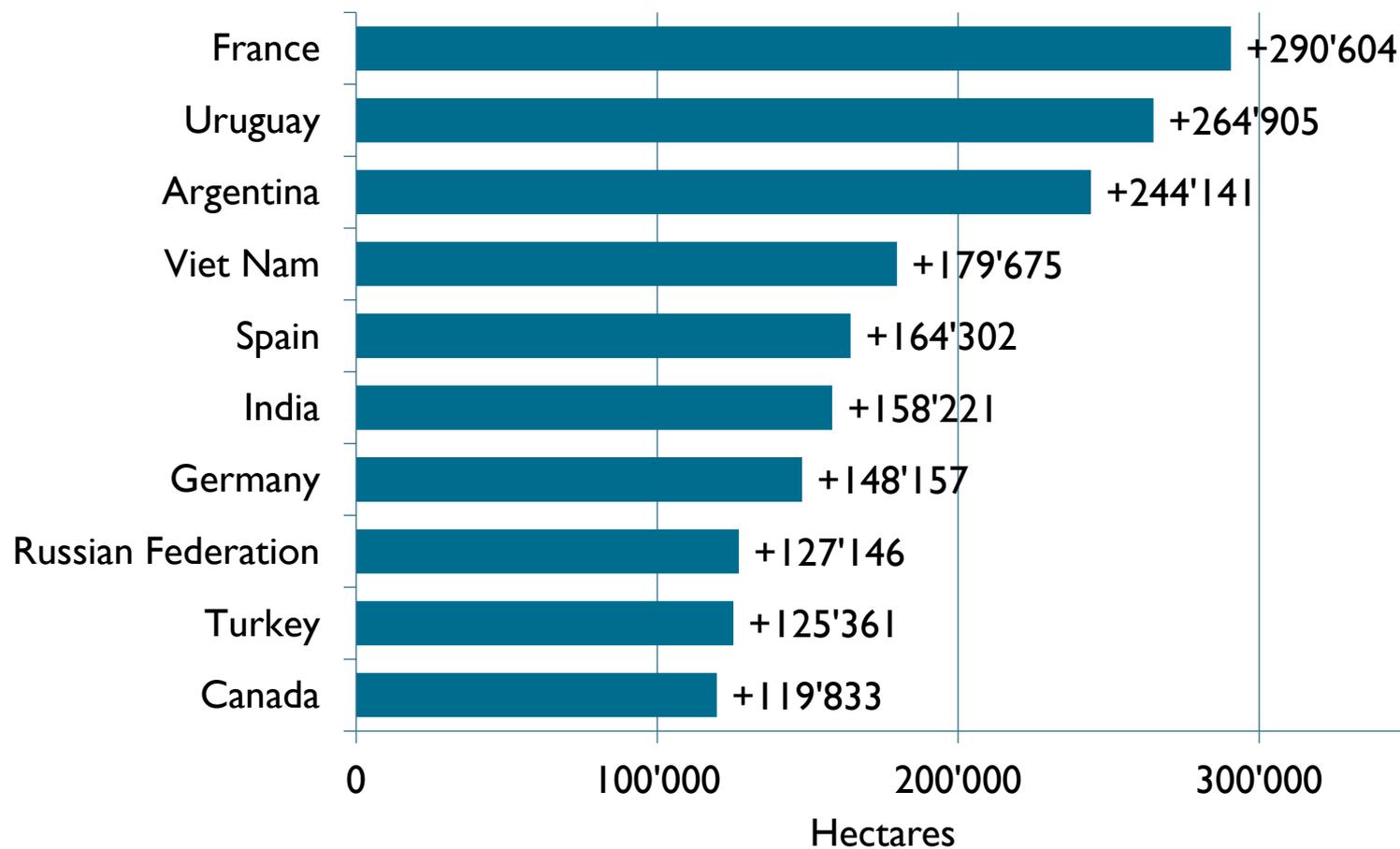
Growth of the organic agricultural land by continent 2010-2018

Source: FiBL-IFOAM survey 2012-2020



The ten countries with the highest increase of organic land 2018

Source: FiBL survey 2020



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 35.7 million hectares.

In total, 107.2 million hectares – agricultural land and other areas – were organic in 2018.

World: Wild collection and beekeeping areas

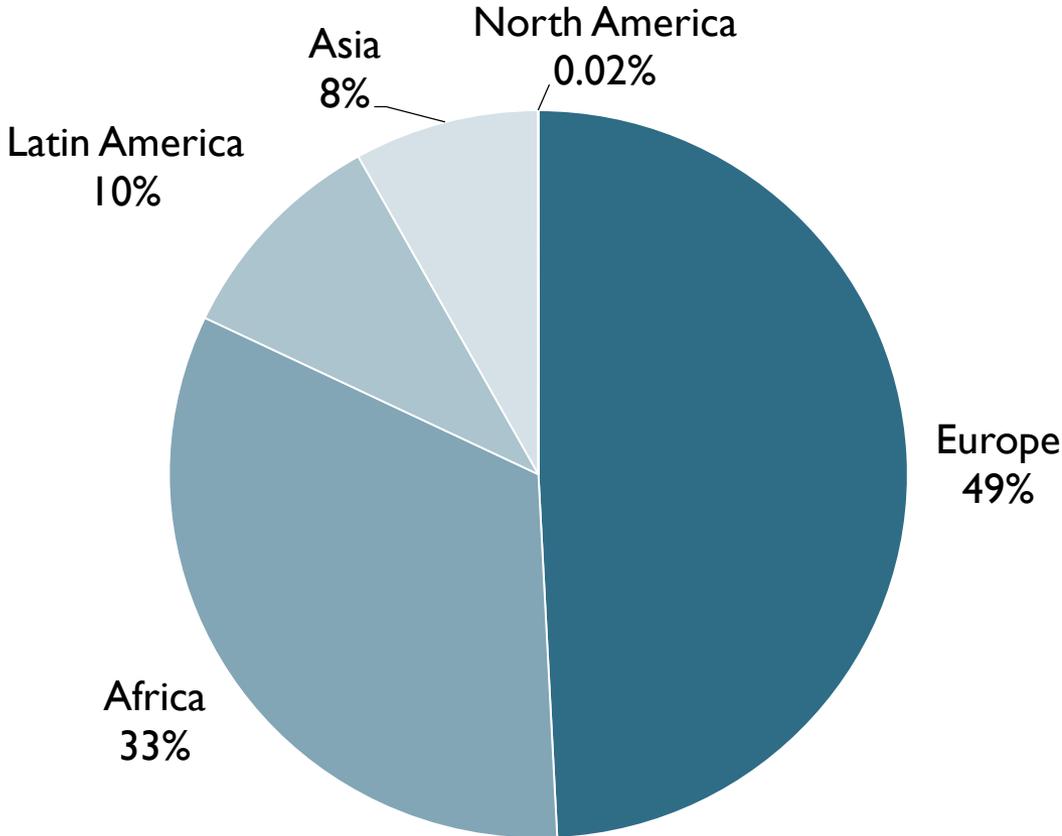
Over 35.1 million hectares of wild collection and beekeeping areas were reported for 2018.

The wild collection / beekeeping areas are 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.

Distribution of organic wild collection and beekeeping areas by region 2018

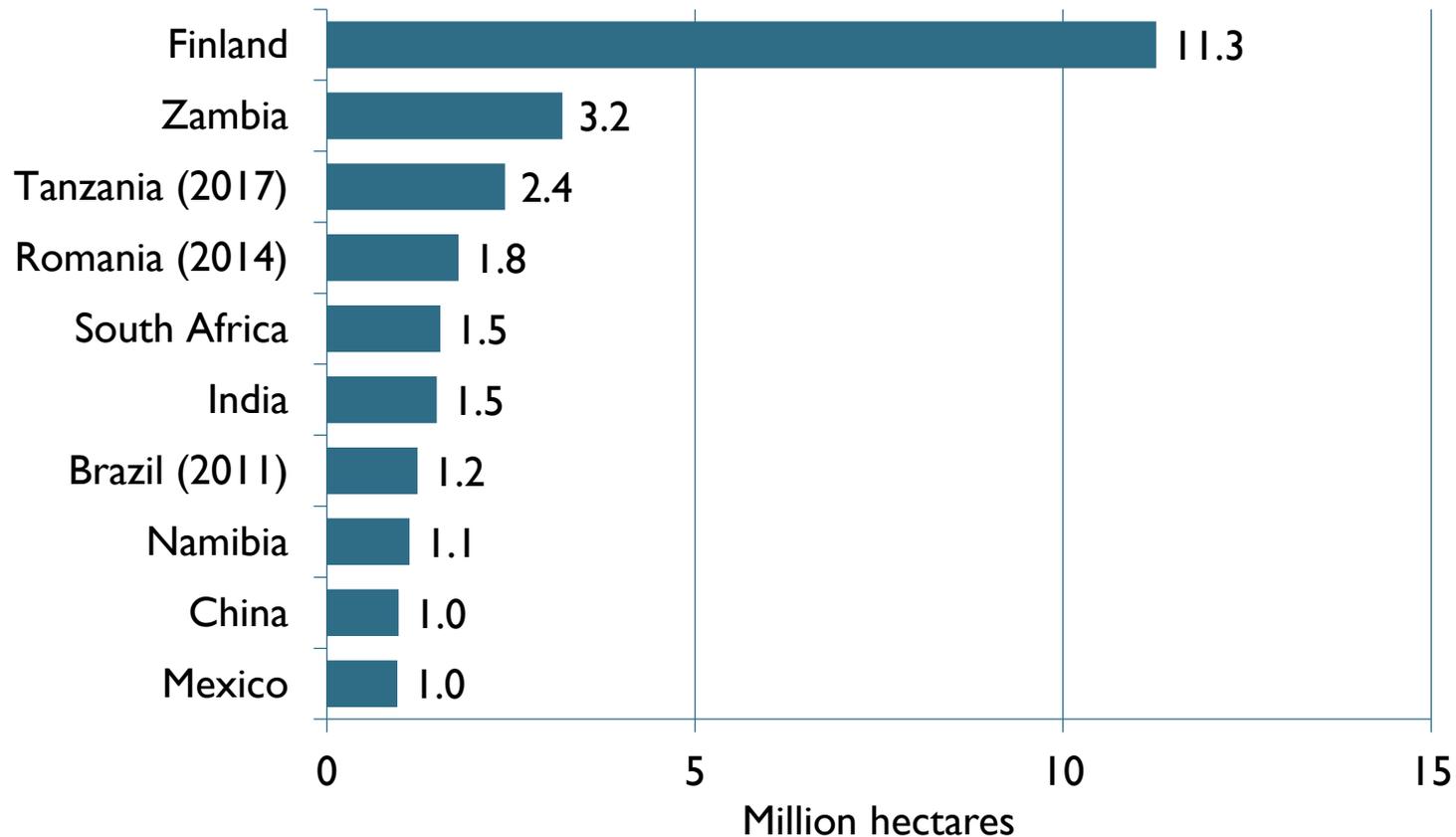
Source: FiBL survey 2020



World: Organic wild collection 2018: Top 10 countries

The ten countries with the largest wild collection and beekeeping areas 2018

Source: FiBL survey 2020



World: Organic producers 2018

For the current survey, a total of 2.8 million organic producers was reported,

According to the data obtained, over 90 percent of the producers are located in Asia, Africa, and Europe.

The country with the most producers is India (1'149'371), followed by Uganda (210'352) and Ethiopia (203'602).

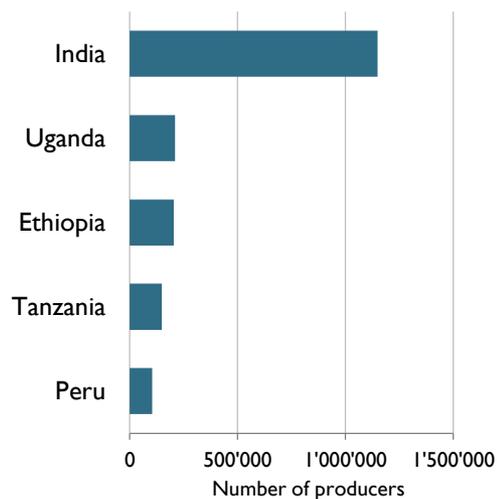
There was a decrease of more than 140'000 producers compared to 2017, or 5.0 percent.

It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2.8 million.

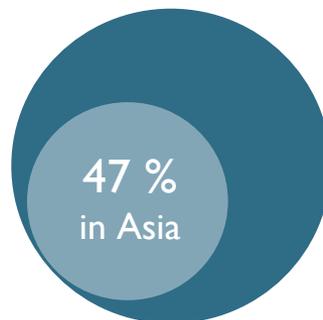
ORGANIC PRODUCERS 2018



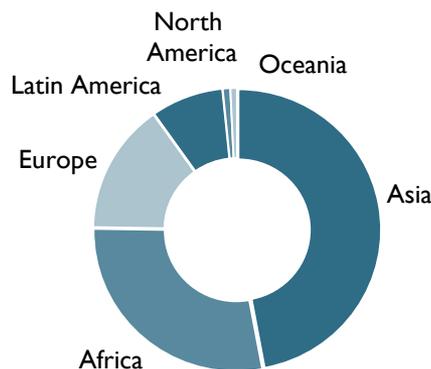
The country with the most organic producers is India, followed by Uganda and Ethiopia.



The five countries with the largest numbers of organic producers 2018



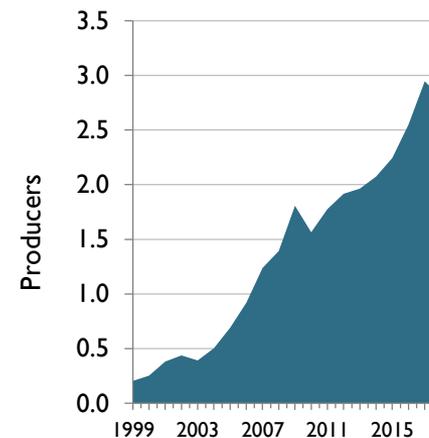
More than 90% of the producers are in Asia, Africa, and Europe.



Distribution of organic producers by region 2018



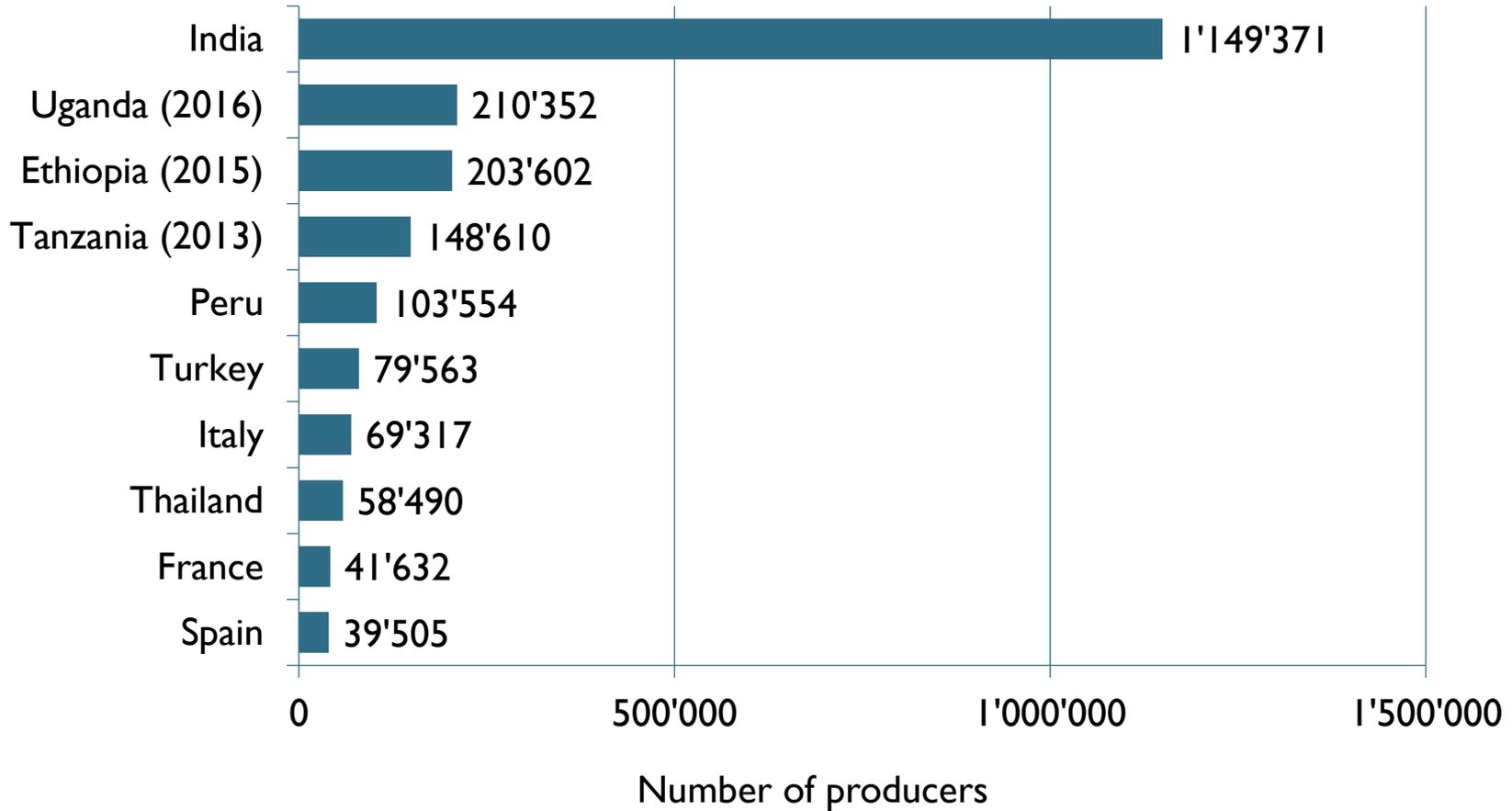
There has been an increase in the number of producers by almost 991'684, or over 55% over the past decade.



Development of the number of organic producers 1999-2018

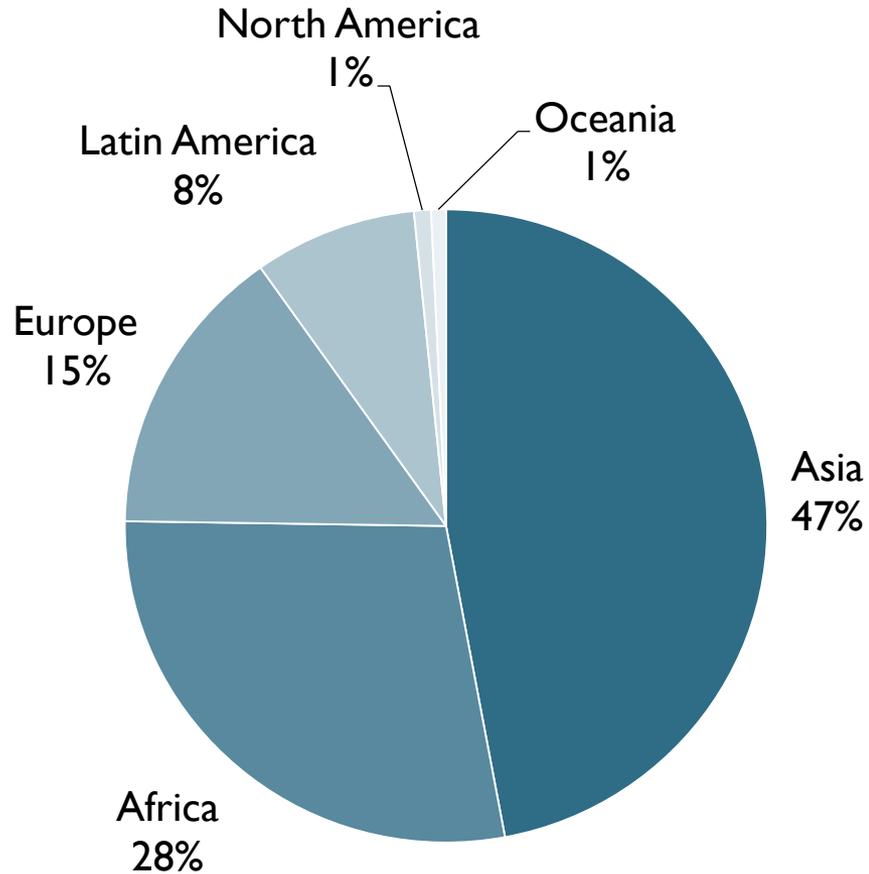
The ten countries with most organic producers 2018

Source: FiBL survey 2020



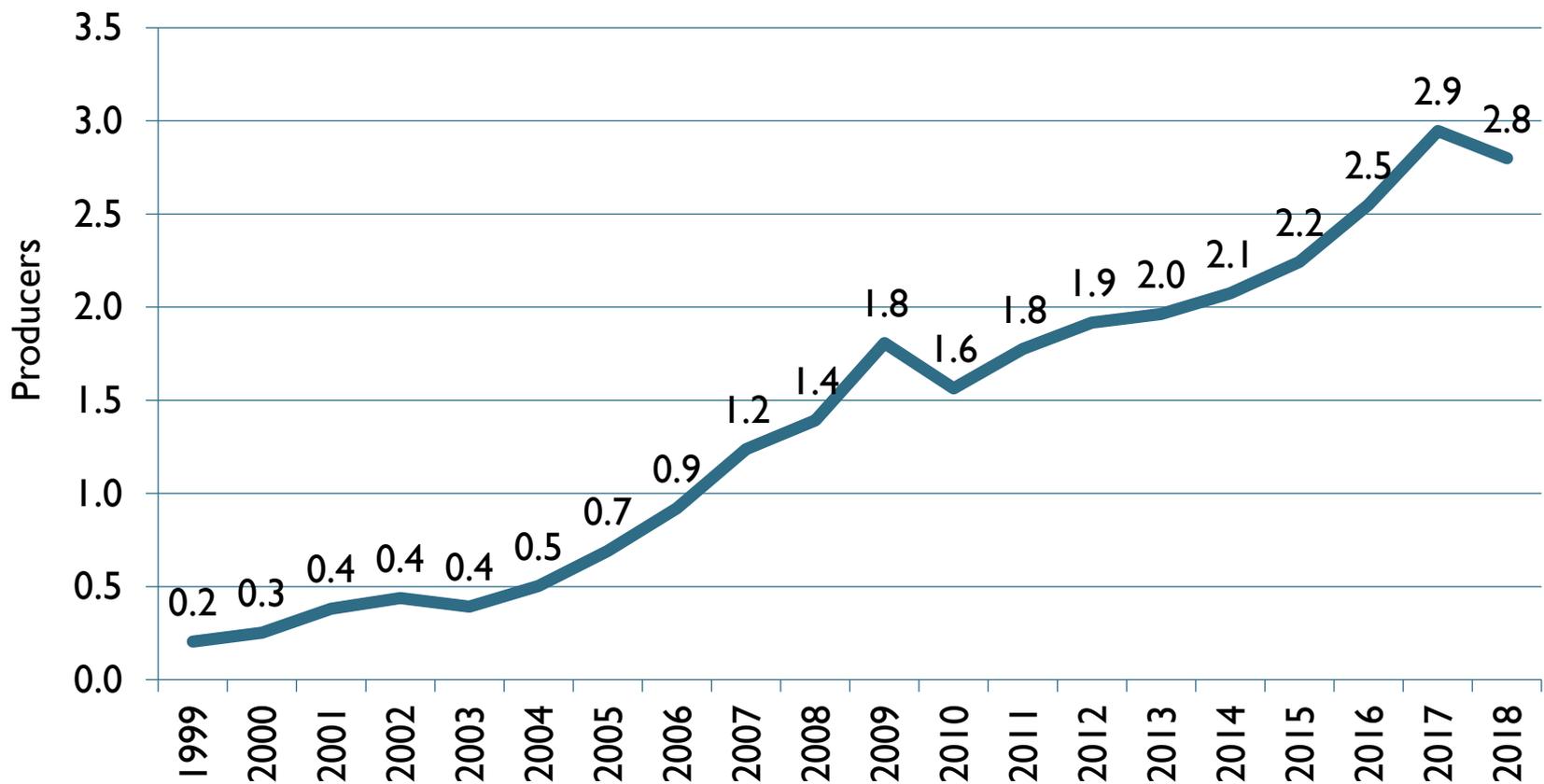
Distribution of organic producers by region 2018

Source: FiBL survey 2020



Development of the number of organic producers 1999-2018

Source: FiBL-IFOAM-SOEL-Surveys 1999-2020



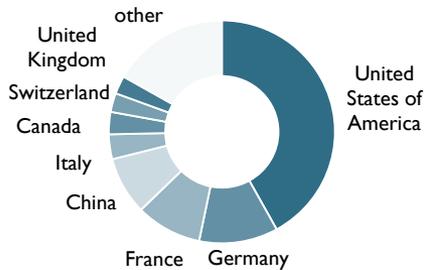
World: The global market for organic food and beverages 2018

- In 2018, the global market for certified organic food and drink was reached 96.7 billion euros.
- The turnover with organic products has increased more than eight fold since 2000.
- Almost ninety percent of the organic product revenues is made in the North America and Europe.
- In 2018, the largest market by far was the United States with 40.6 billion euros of organic food sales, followed by Germany with 10.9 billion euros and France with 9.1 billion euros.
- The highest annual per capita consumption was in Switzerland and Denmark (312 euros).
- Denmark, Switzerland, and Sweden have the highest share of organic food sales. In 2018 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.

ORGANIC RETAIL SALES 2018



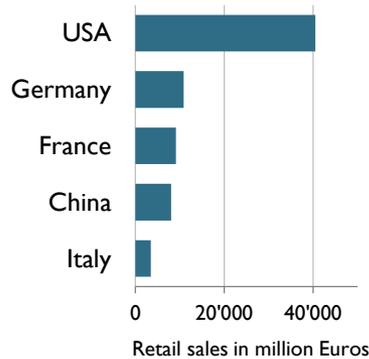
The largest single market is the USA (40.6 billion €) followed by the EU (37.4 billion €) and China. By region, North America has the lead (43.7 billion €), followed by Europe (40.7 billion €) and Asia.



Distribution of retail sales value by country 2018



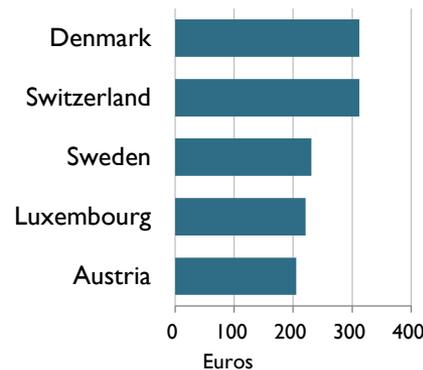
The countries with the largest markets for organic food are the United States (41 billion €), Germany (11 billion €), France (9 billion €) and China (8 billion €).



The five countries with the largest markets for organic food 2018



Denmark and Switzerland have the highest per capita consumption worldwide, followed by Sweden, Luxembourg and Austria.



The five countries with the highest per capita consumption 2018



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

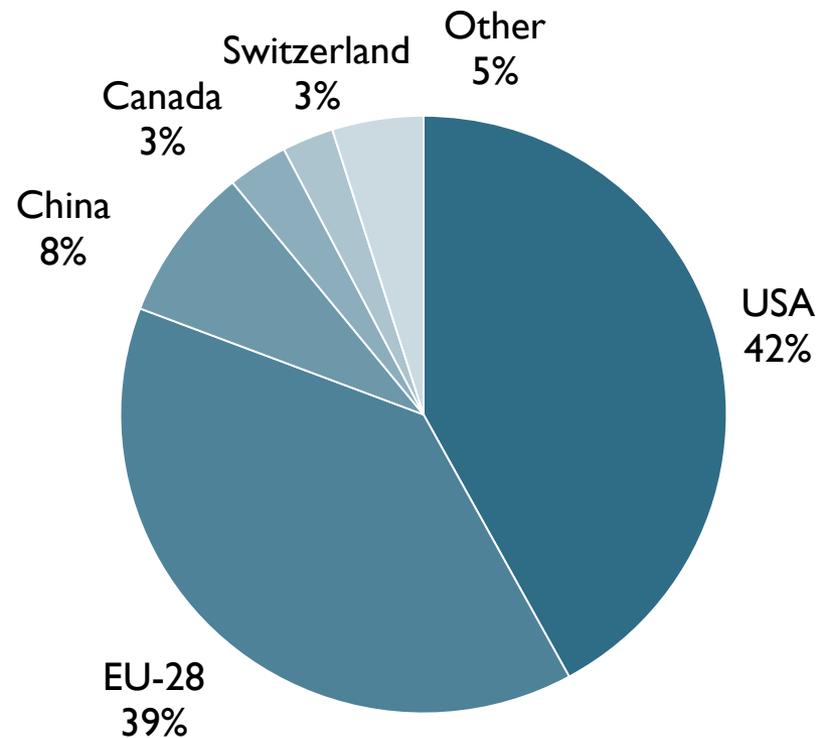


The five countries with the highest organic shares of the total market 2018

World: Global market: Distribution of retail sales by single market 2018

World: distribution of retail sales by single market 2018

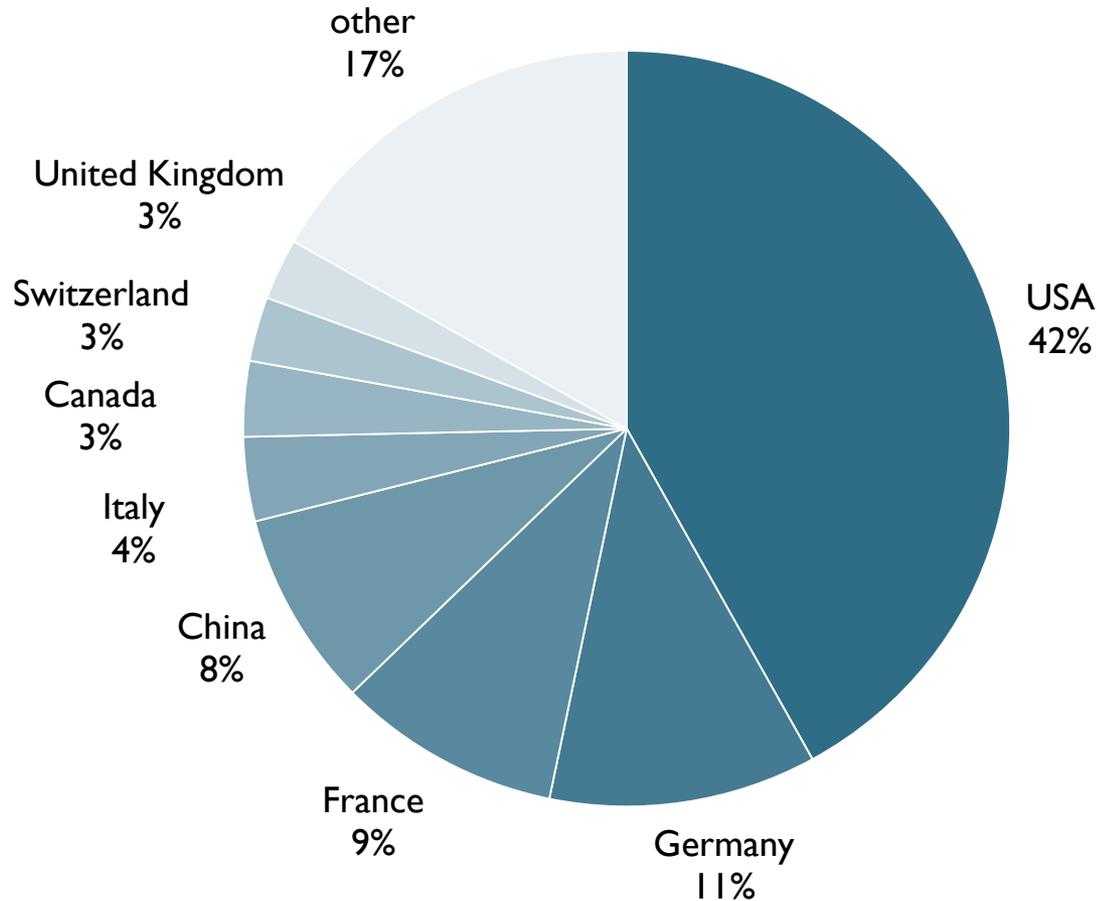
Source: FiBL-AMI survey 2020



World: Distribution of organic retail sales 2018

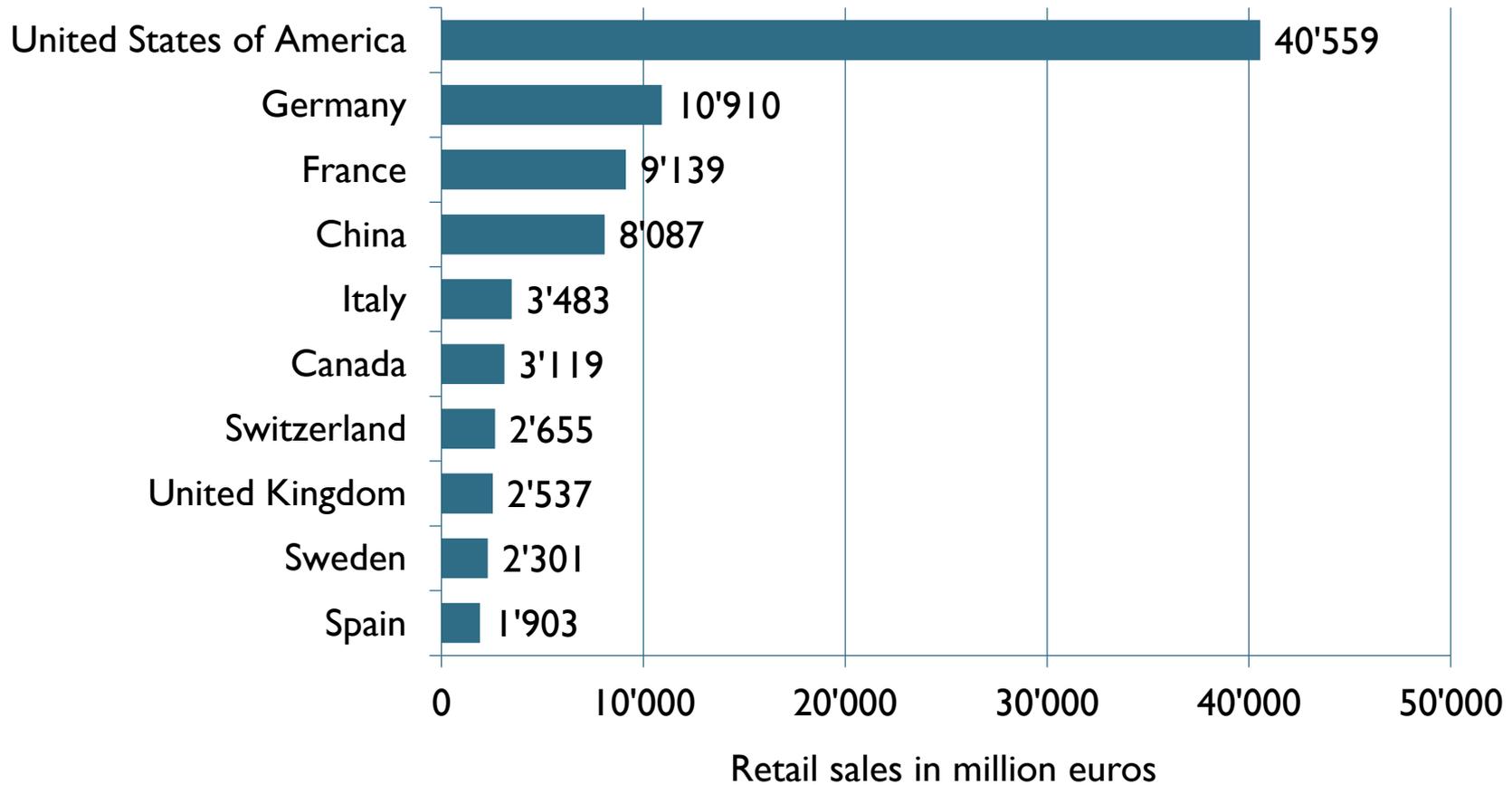
Global market: Distribution of retail sales value by country 2018

Source: FiBL-AMI survey 2020, based on retail sales with organic food



The ten countries with the largest markets for organic food 2018

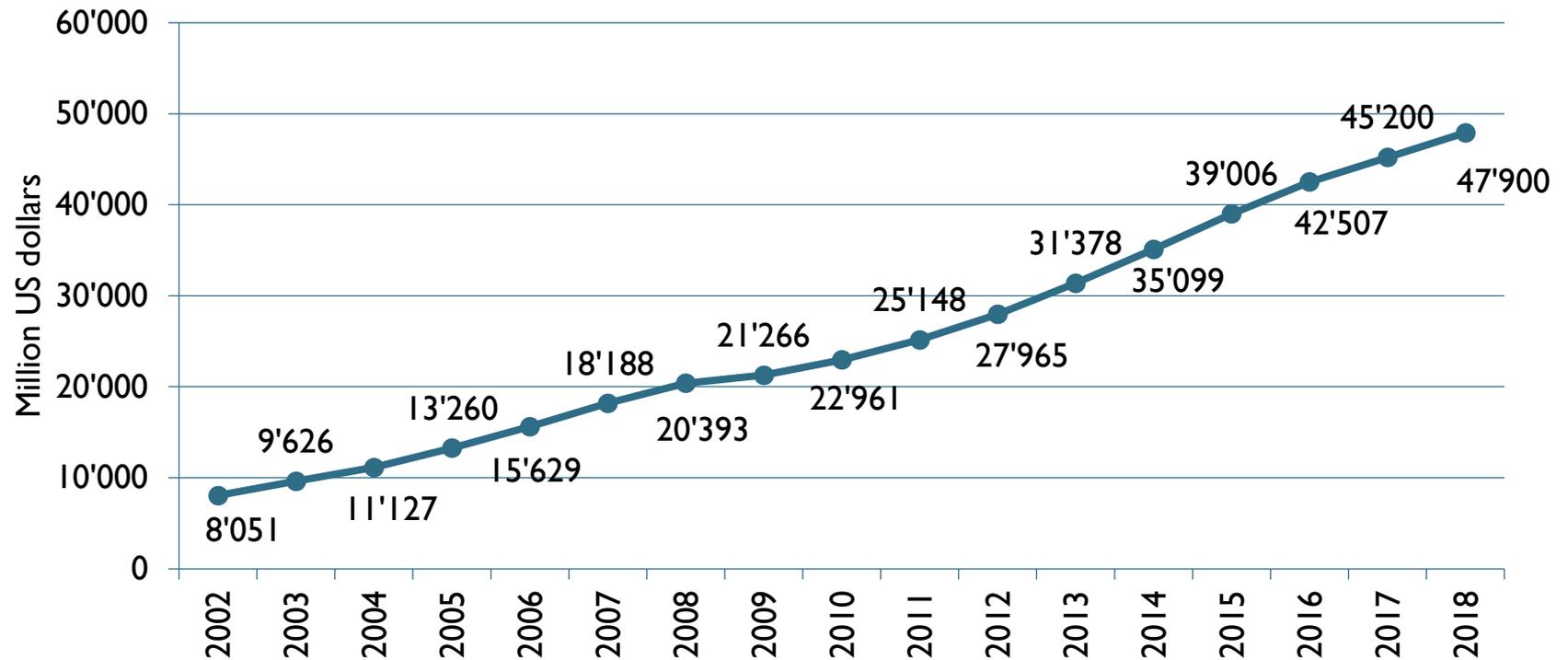
Source: FiBL-AMI survey 2020



United States of America: Growth of retail sales 2002-2018

United States of America: Growth of organic food and beverages retail sales 2002-2018

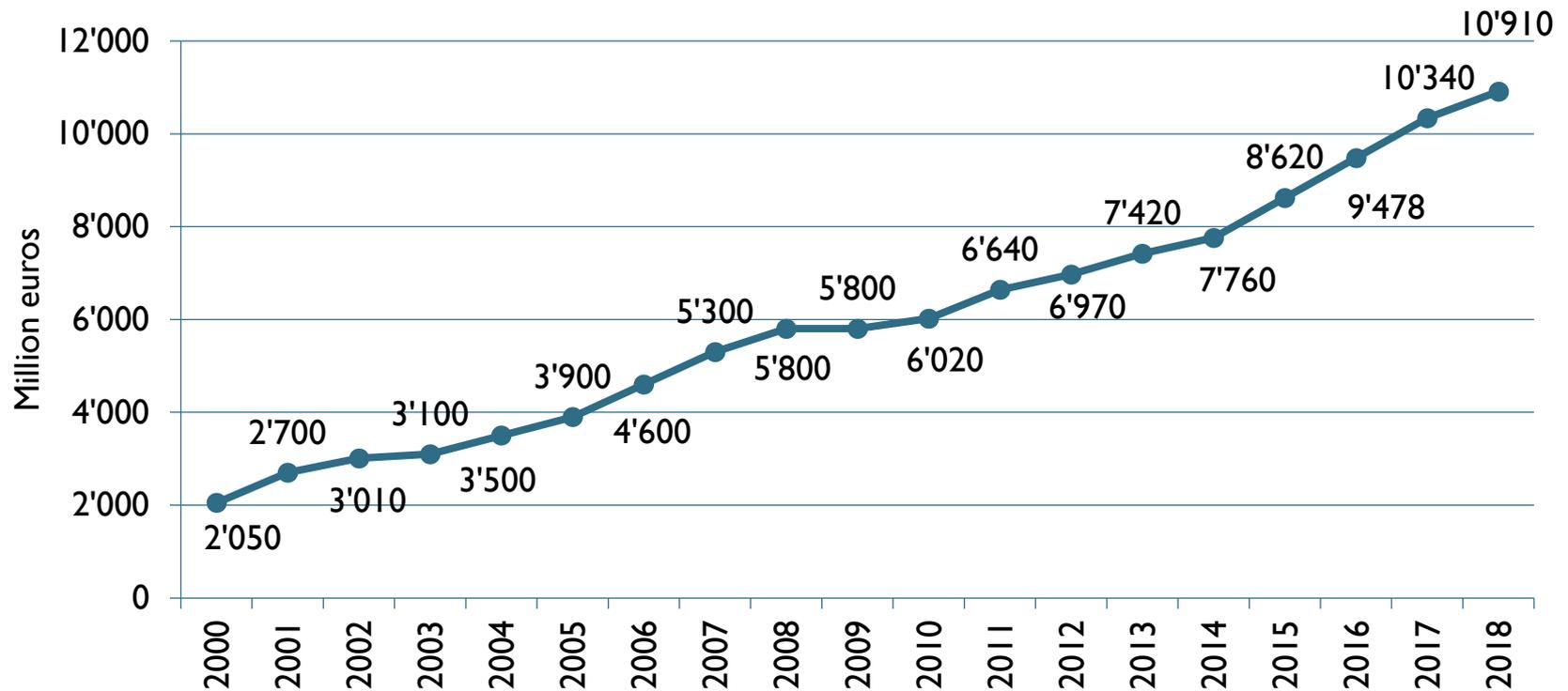
Source: OTA 2000-2020



Germany: Growth of retail sales 2000-2018

Germany: Growth of organic food and beverages retail sales 2000-2018

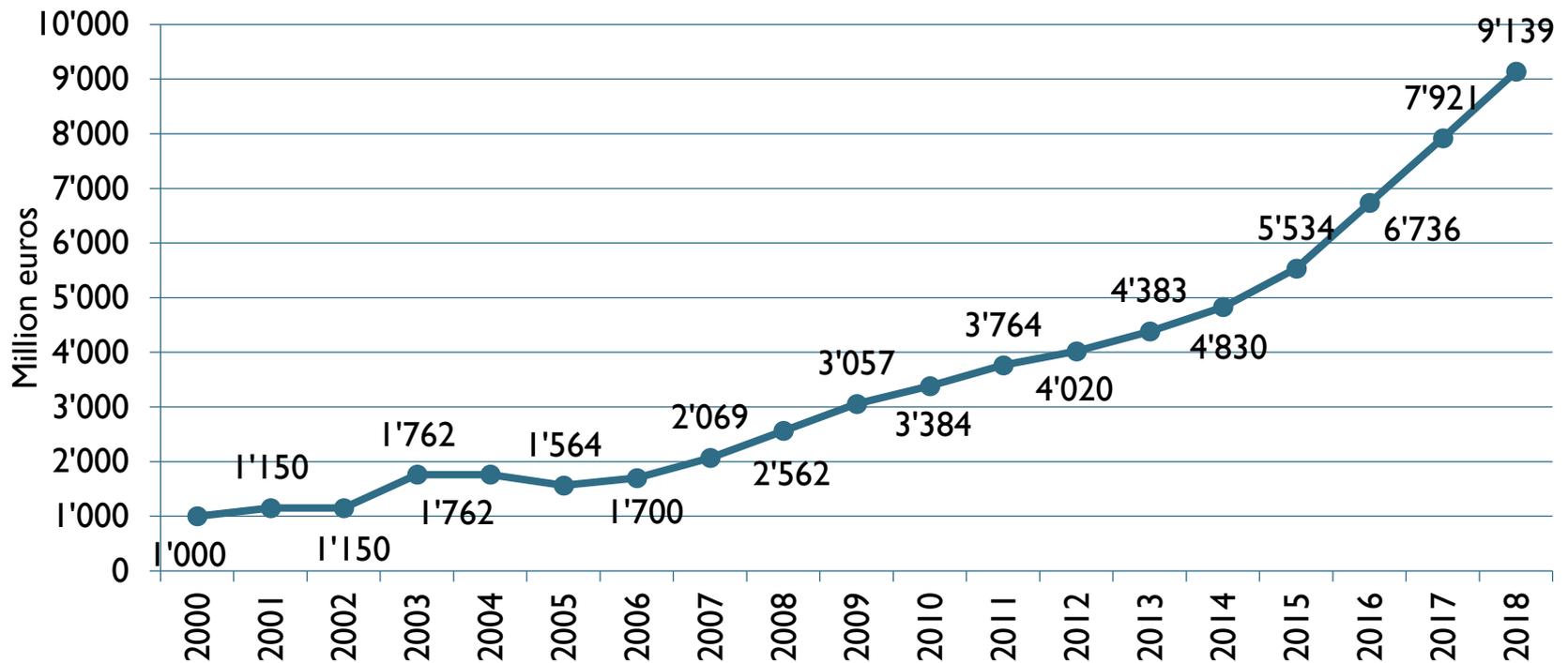
Source: FiBL-AMI surveys 2000-2020



France: Growth of retail sales 2000-2018

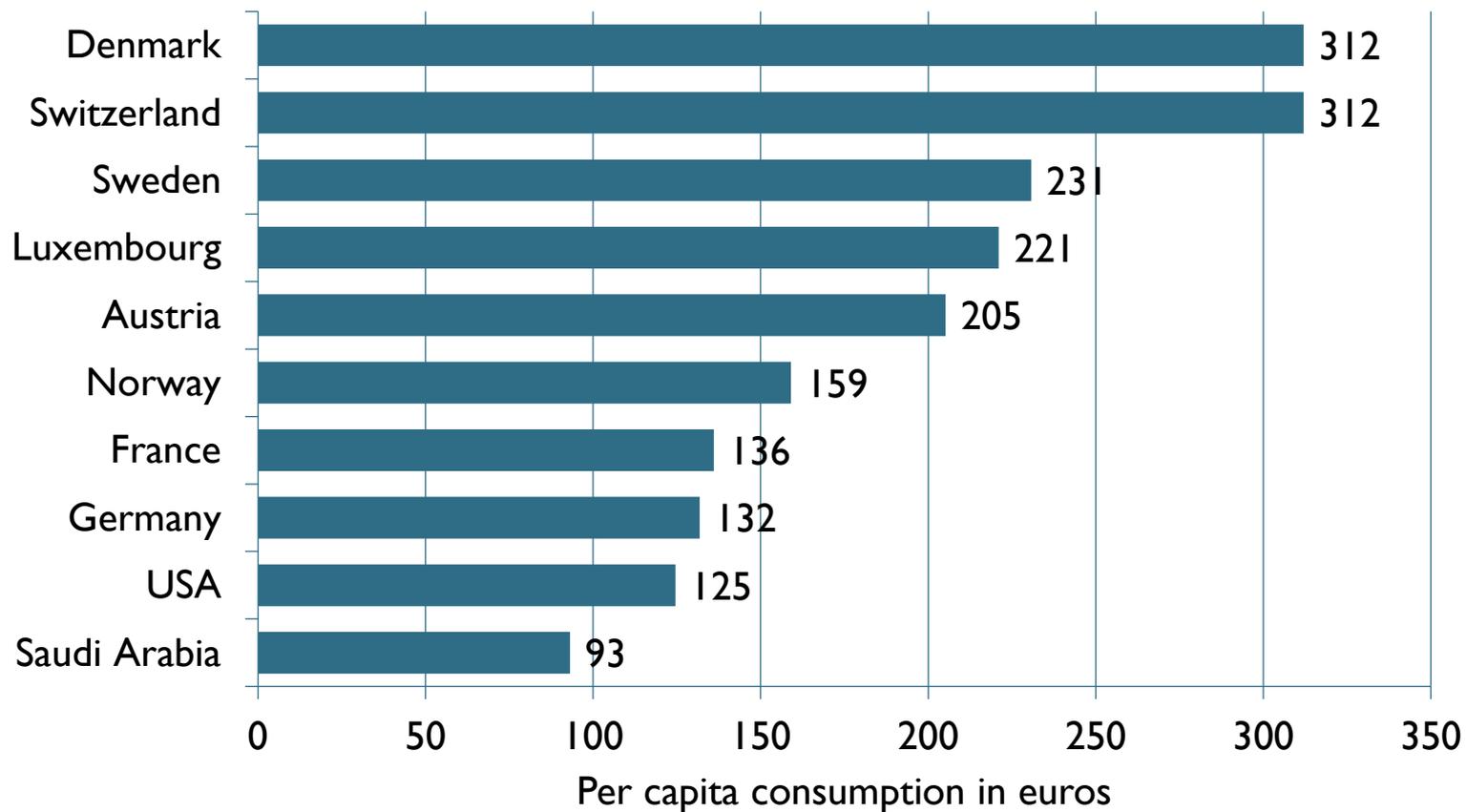
France: Growth of organic food and beverages retail sales 2000-2018

Source: FiBL-AMI surveys 2000-2020



The ten countries with the highest per capita consumption 2018

Source: FiBL-AMI survey 2020



World: Organic farming in the DAC countries 2018

- Almost a quarter of the world's organic agricultural land, 17.3 million hectares, is located in countries listed on the developing/transition countries and in emerging markets.* Almost half is located in Latin American countries (almost 8 million hectares), with Asia (6.5 million) and Africa (2.0 million) in second and third place.
- 2.4 million producers are in these countries.

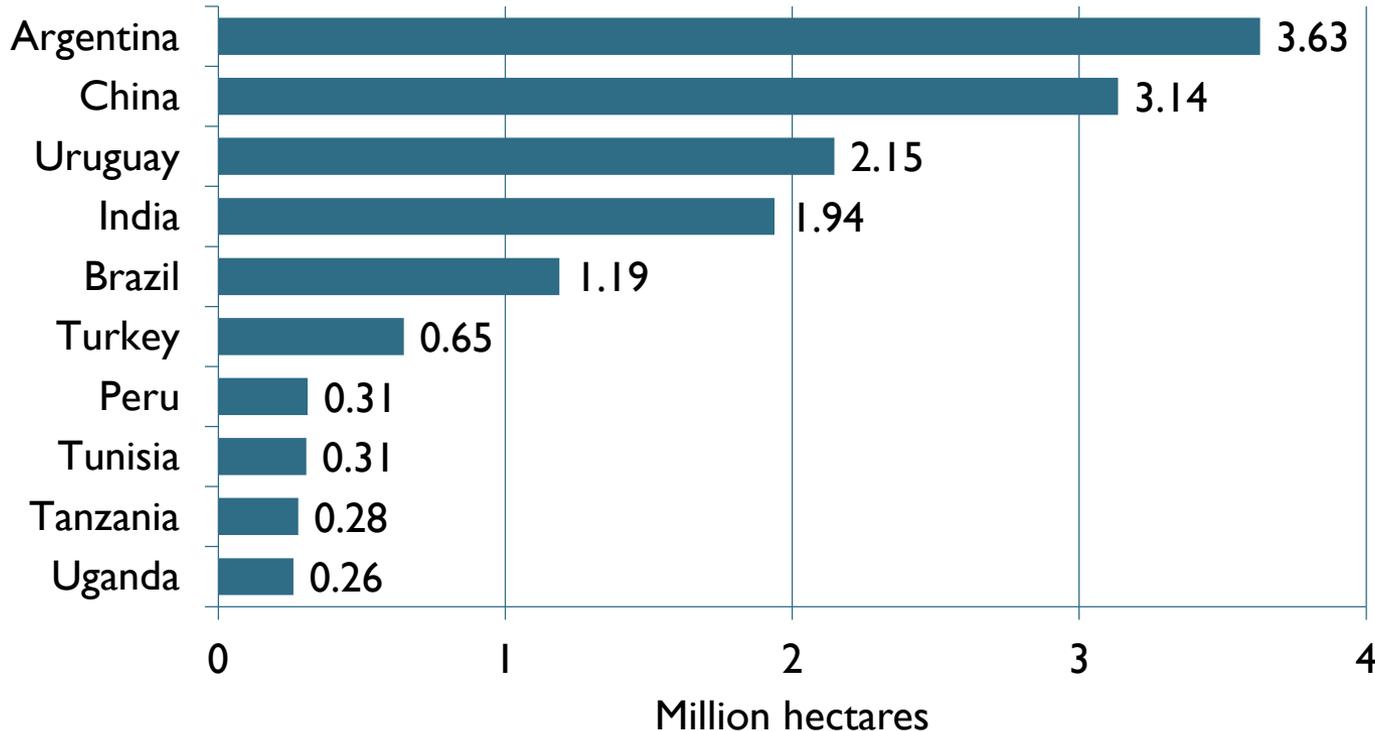
*Countries listed in the List of Recipients of Official Development Assistance (ODA) of the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD). The list is available at:

http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC_List_ODA_Recipients2018to2020_flows_En.pdf

World: DAC list: The top 10 countries with the largest areas of organic agricultural land 2018

The ten countries on the DAC list with the largest areas of organic agricultural land 2018

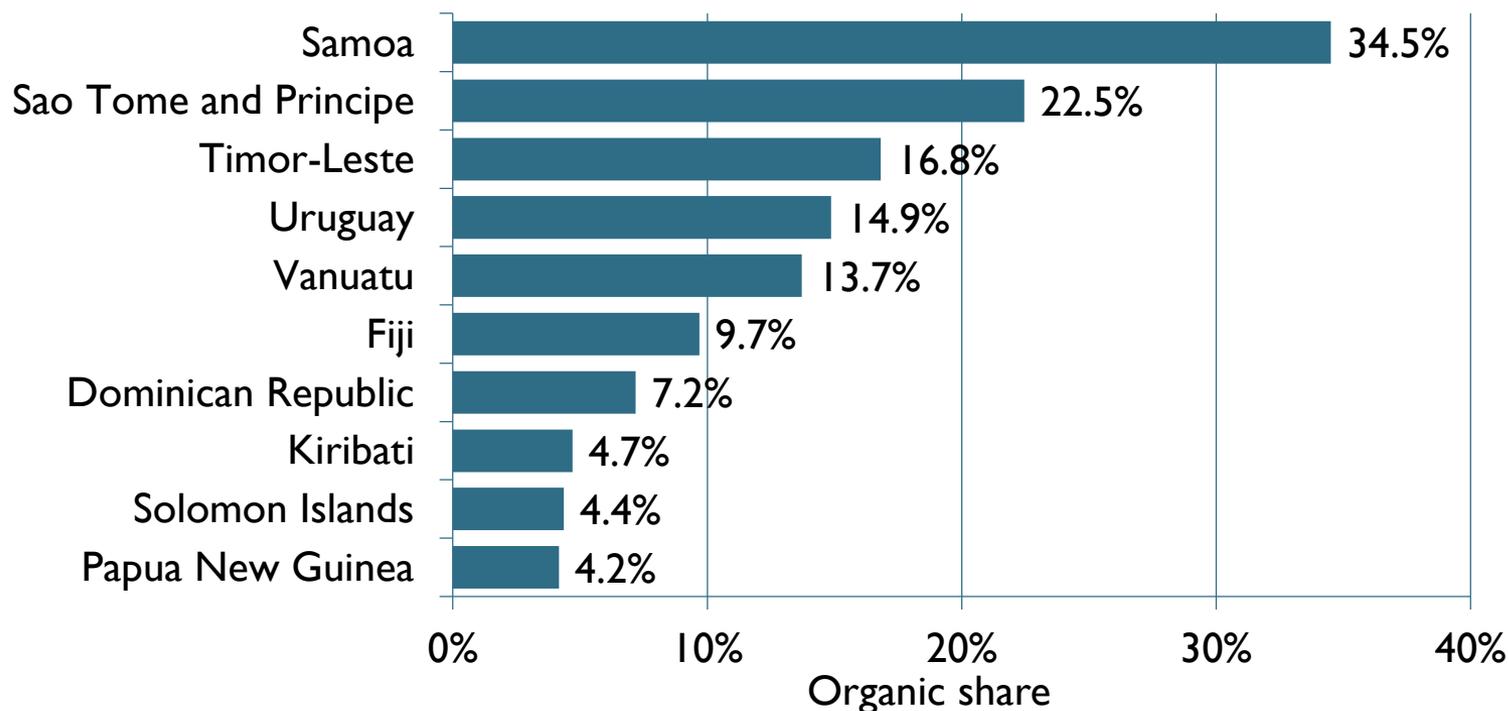
Source: FiBL survey 2020



World: DAC list: The top 10 countries with the highest shares of organic agricultural land 2018

The ten countries on the DAC list with the highest organic shares of the total agricultural land 2018

Source: FiBL survey 2020



More information

More information (PDF, data sources, graphs) at:

<http://www.organic-world.net/yearbook/yearbook-2020.html>

Contact

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Disclaimer

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