Data on organic agriculture worldwide – Developing organic data collection activities further

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Introduction

The market for organic products is growing, and it offers producers and exporters in the south opportunities to improve their incomes and living conditions. However, what role does organic farming play in poorer countries? Some current data are presented in this paper, based on the annual global survey on organic farming carried out by the Research Institute of Organic Agriculture FiBL, in collaboration with the International Federation of Organic Agriculture Movements (IFOAM). These activities are currently funded by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), and NürnbergMesse.

Current statistics: Key indicators

Organic agriculture is developing rapidly and is now practiced in more than 160 countries. Its share of agricultural land and farms continues to grow in many countries.

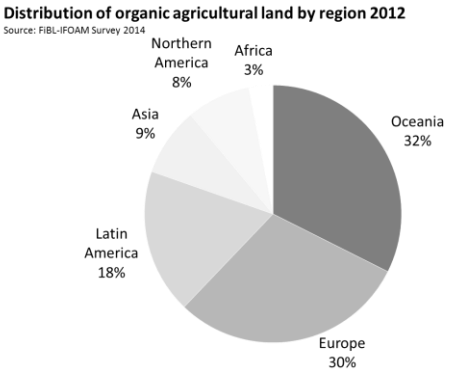
Table 1: Organic agricultural land and farms by continent 2012

Region	Organic agr. land (hectares)	Share of total agr. land (hectares)*	Producers	Retail sales in billion euros
Africa	1'145'827	0.1%	572'862	No data
Asia	3'217'867	0.2%	684'873	1.97
Europe	11'171'413	2.3%	321'625	22.78
Latin America	6'836'498	1.1%	316'583	0.60
Northern America*	3'012'354	0.7%	16'470	24.73
Oceania	12'164'316	2.9%	14'605	1.01
Total	37'544'909	0.9%	1'927'018	Approx. 50

Source: FiBL-IFOAM Survey 2014, see Willer & Lernoud 2014

*Share calculated on the basis of the countries that are

According to the latest survey on global organic farming, 37.5 million hectares of agricultural land are organic (2012). This constitutes a growth of 0.5 percent or almost 0.2 million hectares compared with 2012. Oceania owns a large part of the organic agricultural land, followed by Europe and Latin America (Figure 1). Currently, the country with the largest organic area is Australia with more than 12 million hectares (Figure 2). The share of organically-managed of all agricultural land is highest in Oceania and Europe. High shares are reached in Europe; in seven countries, more than ten percent of the agricultural land is organic. In the European Union (EU 27), 5.6% of the land is under organic management.



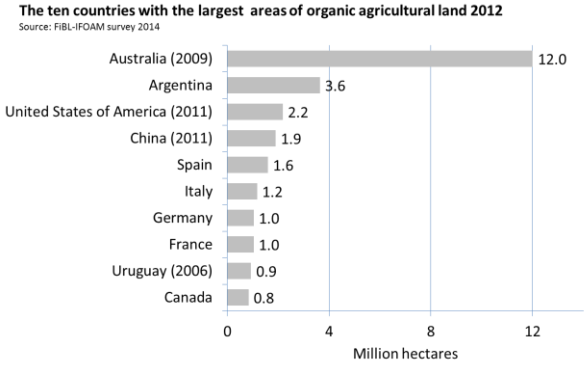


Figure 1 (left): Distribution of organic land by region 2012
Figure 2 (right): The ten countries with the largest organic agricultural areas 2012

Source: FiBL-IFOAM survey 2014, see Willer & Lernoud, 2014

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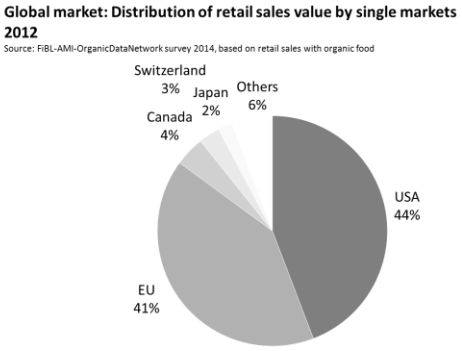
Global demand for organic products remains robust, even though a slowdown was noticed after 2008, the year of the financial crisis. Organic Monitor estimates international sales to have reached 63.8 billion US Dollars in 2012, more than three times of that of 2000, when sales were at 18 billion US Dollars. Consumer demand for organic products is concentrated in North America and Europe; these two regions comprise more than 90 percent of global revenues (Figure 3). Asia, Latin America and Australasia are important producers and exporters of organic foods (Sahota 2014). The countries with the largest market are the United States, Germany and France (Figure 4). Meanwhile, the countries having the highest market shares are Denmark (7.6% in 2012), Austria (6.5%), and Switzerland (6.3%).



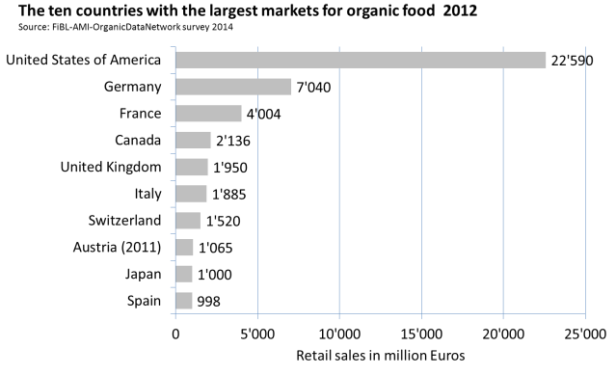


Figure 3 (left): Distribution of organic retail sales (million Euros) by geographic region in 2012
Figure 4 (right): The ten countries with the largest organic markets in 2012

Source: FiBL-IFOAM survey 2014, see Willer & Lernoud, 2014

Current status of organic farming in developing and transition countries

The analysis of the global organic data for the countries on the list of recipients of Official Development Assistance (DAC List[3]) shows, that more than one third of the world's organic agricultural land (11.3 million hectares) is in countries on this list. Most of this land is Latin America followed by Asia and Africa. The leading countries in terms of organic land area are Argentina, China and India, much of these areas being grazing areas or areas for which their use is not known. The highest percentages of organic land are in several Pacific Island States, the Dominican Republic, and East Timor – in these countries the shares of organic land of all agricultural land are comparable to those in Europe. However, out of the countries on the DAC list covered by the survey, only few have a higher share of organic land than one percent. Thus, compared to the developed countries, organic farming is lagging behind. However, in order to assess the economic importance of organic farming in these countries, other indicators than used so far, might be more be useful.

Need for detailed statistics – Area data for crops data as a basis for the calculation of production?

So far, the total organic area, share of overall agricultural area, number of organic farmers, and, for the developed world, organic market values and market share are seen as the key indicators, with which the importance to the organic sector is commonly assessed on a country and on a global level. However, it is also relevant to know more about the production, domestic sales and in particular exports of selected products.

In 2013, FiBL, in cooperation with the International Institute for Sustainable Development (IISD), had the opportunity to compile production data for some of the most important organic high-value cash crops: bananas, cocoa, coffee, palm oil, tea, soy, and sugar (Potts et al., 2014). When not available, which is the case for most countries, these data were calculated on the basis of the available area data for the selected crops that have been collected by FiBL and IFOAM. FAO yield data were used to calculate the production, assuming a certain percentage of the conventional yields, depending on the crop. The calculated data shows the estimated global organic production for these crops and the importance of these crops for individual countries, thus enabling a comparison with Voluntary Standards Initiatives, like, for instance, Fair Trade, Utz certified, etc. Where available, export data were used to estimate how much of the estimated organic production was actually sold through organic channels. In most cases, however, the latter were calculated, using experts' assumptions and estimates. With the available figures from the FiBL-IFOAM survey, it could be shown, for instance, that a very large part of the cocoa production in the Dominican Republic is organic. As cocoa is one of the key agricultural export products of the country, this shows the indisputable economic significance of organic production for this crop.

However, even though such calculations are possible, it must be said that they cannot be, in any way, a replacement for proper data collection - based on data from the customs, the certifiers, and exporters - and data analysis. Too many insecurities are attached to calculated and estimated data, which might lead to wrong assumptions and decisions. Some countries such as Peru, Costa Rica, and the Dominican Republic have set up very good data collection systems, and it would be recommendable for other countries to follow such good examples.

[3] For this paper the countries listed on the List of Recipients of Official Development Assistance (ODA) of the Development Assistance Committee (DAC) of the Organisation for Economic Co-operation and Development (OECD) were analysed. The list is available at www.oecd.org/dataoecd/23/34/37954893.pdf

Table 2: Estimated global organic production of selected crops 2011

Crop	Estimated organic production [Million metric tons]	Global production [Million metric tons] according to FAOSTAT	Organic share	Leading producers according to FiBL-IFOAM survey data and calculations
Bananas	0.79	145.44	0.5 %	Dominican Republic, Ecuador, Peru
Cocoa	0.10	4.40	2.4 %	Dominican Republic, Peru, Ecuador
Coffee	0.25	8.28	3.0 %	Peru, Ethiopia, Mexico
Soy	0.60	260.92	0.2 %	China, United States, Canada
Sugarcane	2.49	1'794.36	0.1 %	Brazil, Paraguay, Thailand
Tea	0.05	4.67	1.1 %	China, India, Japan

It should be noted that for some countries the shares can be considerably higher than the global share of these crops.

Source: FiBL estimated, calculated on the basis of the fully converted area as provided by national data sources and FiBL estimations of organic crops yields

Conclusions

From the data gained through the FiBL-IFOAM organic survey, it is clear that in many countries of the South, organic farming plays an increasingly important role. Many high-value crops are grown, reaching substantial shares of total production. In the light of booming organic markets, it can be assumed that the market/export potential for organic products continues to be high. However, more effort should be put in the development of local markets to ensure supply of organic products not only in industrialised countries but also in countries in the south.

In order to draw conclusions on the potential of organic farming in the exports and domestic markets, more data are needed, covering information such as domestic supply and sales of organic food, export volumes and values, and solid information on yields in organic agriculture. There is a clear need for governments to provide better data. With more and more countries implementing organic farming regulations, collection activities should be eased into the future, and governments should support such activities.

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