



Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2015

Part 1: Global data and survey background

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Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2015: Part 1: Global data and survey background

- › Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, in cooperation with the International Federation of Organic Agriculture Movements IFOAM – Organics International, based on national data sources and data from certifiers.
- › Data as published February 2015 in FiBL & IFOAM (2015) The World of Organic Agriculture. Statistics and Emerging Trends 2015. Frick and Bonn
- › For updates check www.organic-world.net
- › This presentation is available online at: <http://www.organic-world.net/yearbook/yearbook2015/slide-presentations.html>
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- › © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2015

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- › The Swiss State Secretariat of Economic Affairs SECO, Berne



- › International Trade Centre ITC



- › Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair



- › European market data: Co-funding from the European Union for the European data survey in the framework of the OrganicDatanetwork project



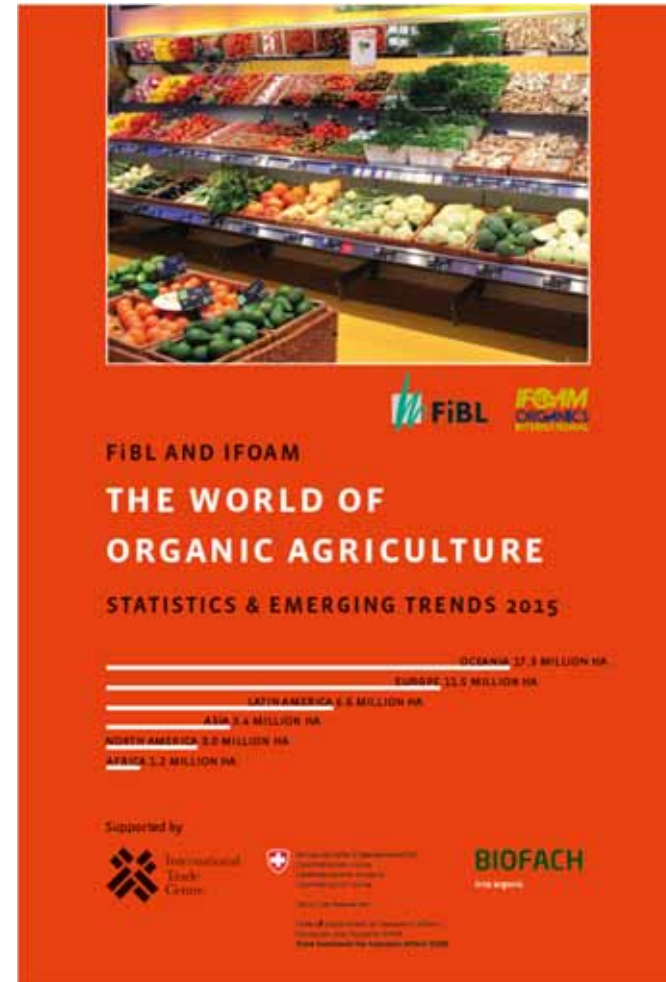
- › 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2015

* See also disclaimer on last page of this slide show

The World of Organic Agriculture 2015

- › The 16th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2015.*
- › Contents:
 - › Results of the survey on organic agriculture worldwide;
 - › Organic agriculture in the regions and country reports;
 - › Australia, Canada, the Pacific Islands, Mediterranean region, and The United States of America.
 - › Chapters on the global market, standards & legislations, voluntary standards, PGS, European market and vegetables production in China
 - › Numerous tables and graphs.
 - › The book can be ordered via IFOAM.bio and shop.FiBL.org.

*Willer, H, Lernoud, J, (2015) The World of Organic Agriculture. Statistics and Emerging Trends 2015. 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 displays the homepage of the Organic World website. The header includes the title "Organic World" and the subtitle "Global organic farming statistics and news". A navigation menu contains links for Home, News, About, Statistics, Yearbook, Country info, Password area, and Contact / Site info. The main content area features a list of editions from 2013 down to 2000-2007. A search bar is present below the list. The right side of the page highlights the 14th edition of "The World of Organic Agriculture 2013", providing details about its launch at BioFach 2013 in Nuremberg, Germany, and describing its content, which includes global organic farming statistics, market data, and country reports. Logos for FIBL, IFAM, and BIOFACH are visible at the bottom of the page.

About this presentation

- › There are 3 presentations summarizing the key results of the FiBL-IFOAM survey on organic agriculture worldwide 2015 (data 2013). 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/yearbook2015/slide-presentations.html> :
 - › Part 1: Global data 2013 and survey background
 - › Part 2: Land use and key crops in organic agriculture 2013
 - › Part 3: Organic agriculture in the regions 2013

The 16th Survey on organic agriculture worldwide

- › The 16th 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 – Organics International) and further partners.
- › The survey was carried out between July 2014 and February 2015.
- › Data were received from 170 countries.
- › New countries included: Andorra, Bahamas, Iraq, Mayotte.
- › 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 2015” and at www.organic-world.net.

Countries covered by the survey on organic agriculture 2013

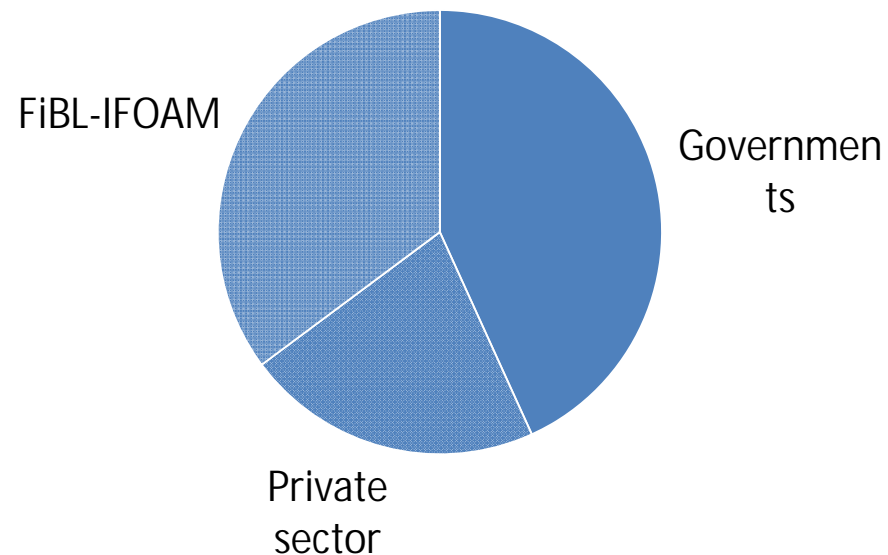
Table 1: Countries and areas covered by the global survey on organic agriculture 2013

	Countries* with data on organic agriculture	Countries per region ¹	Share of countries that provided data (%)
Africa	39	56	70%
Asia	39	47	83%
Europe	47	47	100%
Latin America and Caribbean	30	46	65%
North America	3	5	60%
Oceania	12	26	46%
World	170	227	75%

Source: FiBL-IFOAM survey 2015

*Where the designation "country" appears in this book, it covers countries or areas.²

Organic data collection systems world-wide for data on area, operators and production (total 170 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 and IFOAM collect the data from the international certifiers

International certifiers that provided data for several countries



Soil Association

Networks, transnational data collection efforts



General notes on the data

- › Data sources: For data sources see annex of The World of Organic Agriculture 2015 or www.organic-world.net/statistics-data-sources.html
- › Countries: For countries and areas, FiBL and IFOAM used the Standard Country and Area Codes Classifications as defined by the United Nations Statistics division.
- › Term organic: In the tables, the term organic refers to the fully converted and in-conversion areas.
- › Share of total agricultural land: In some cases the calculation of the shares of organic agricultural land, based on the Eurostat and FAOSTAT data, might differ from the organic shares obtained from ministries or local experts.
- › Producers: Some countries report the number of smallholders, and others only the numbers of companies, projects or grower groups, which may each comprise a number of producers.
- › Data revisions: Should data revisions and correction become necessary these are communicated at the [data revision pages](http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2) of Organic-World.net:
<http://www.organic-world.net/statistics/statistics-data-revisions.html?L=2>.

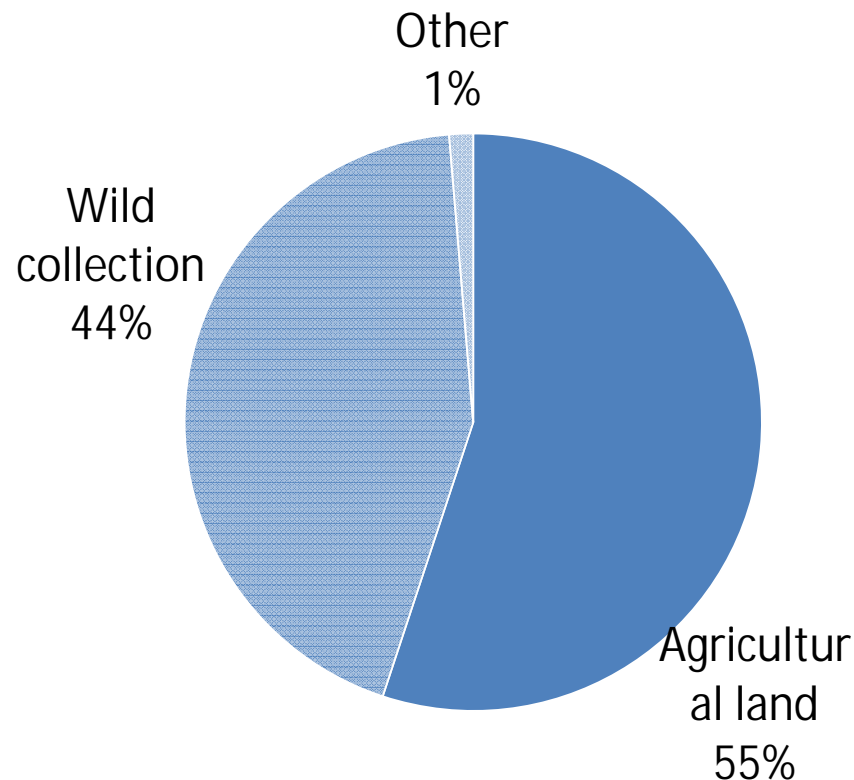
Key data/indicators on organic agriculture world-wide 2013

- › 170 countries have data on organic agriculture.
- › 43.1 million hectares of agricultural land are organic (including conversion areas).
- › 11 countries have more than ten percent organic agricultural land, and 15 countries have between 5 and 10 percent organic agricultural land.
- › There are more than 35 million hectares of further non agricultural areas.
- › 2 million producers were reported.

Distribution of organic areas

Distribution of all organic areas in 2013

Source: FiBL-IFOAM Survey 2015



> Agricultural land (43.1 million hectares in 2013)

> 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 (35.1 million hectares in 2013)

> Wild collection/Bee keeping (34.1 million hectares)

> Forest

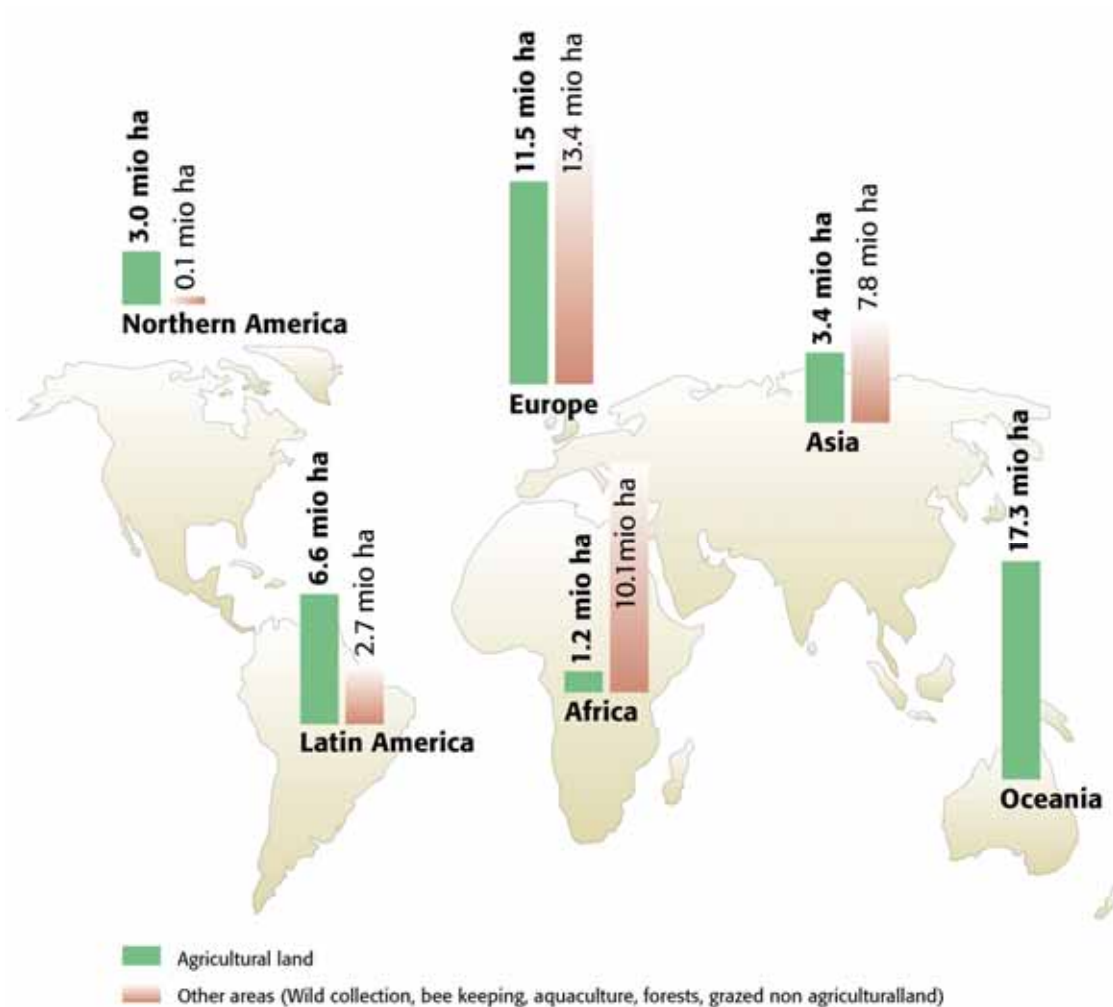
> Aquaculture

> Grazing areas on non-agricultural land

Organic agricultural land by region 2013

- › Currently 43.1 million hectares are under organic agricultural management (end of 2013 for most data).
- › The distribution of the organic agricultural land is as follows:
 - › Oceania (17.3 million hectares);
 - › Europe (11.5 million hectares);
 - › Latin America (6.6 million hectares),
 - › Asia (3.4 million hectares),
 - › North America (3.0 million hectares), and
 - › Africa (1.2 million hectares).
- › Oceania has 40 percent of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, almost 30 percent of the world's organic agricultural land. Latin America is has 15 percent of the world's organic land.
- › In addition to the agricultural land, there are 35 million hectares of non-agricultural areas, mainly wild-collection.

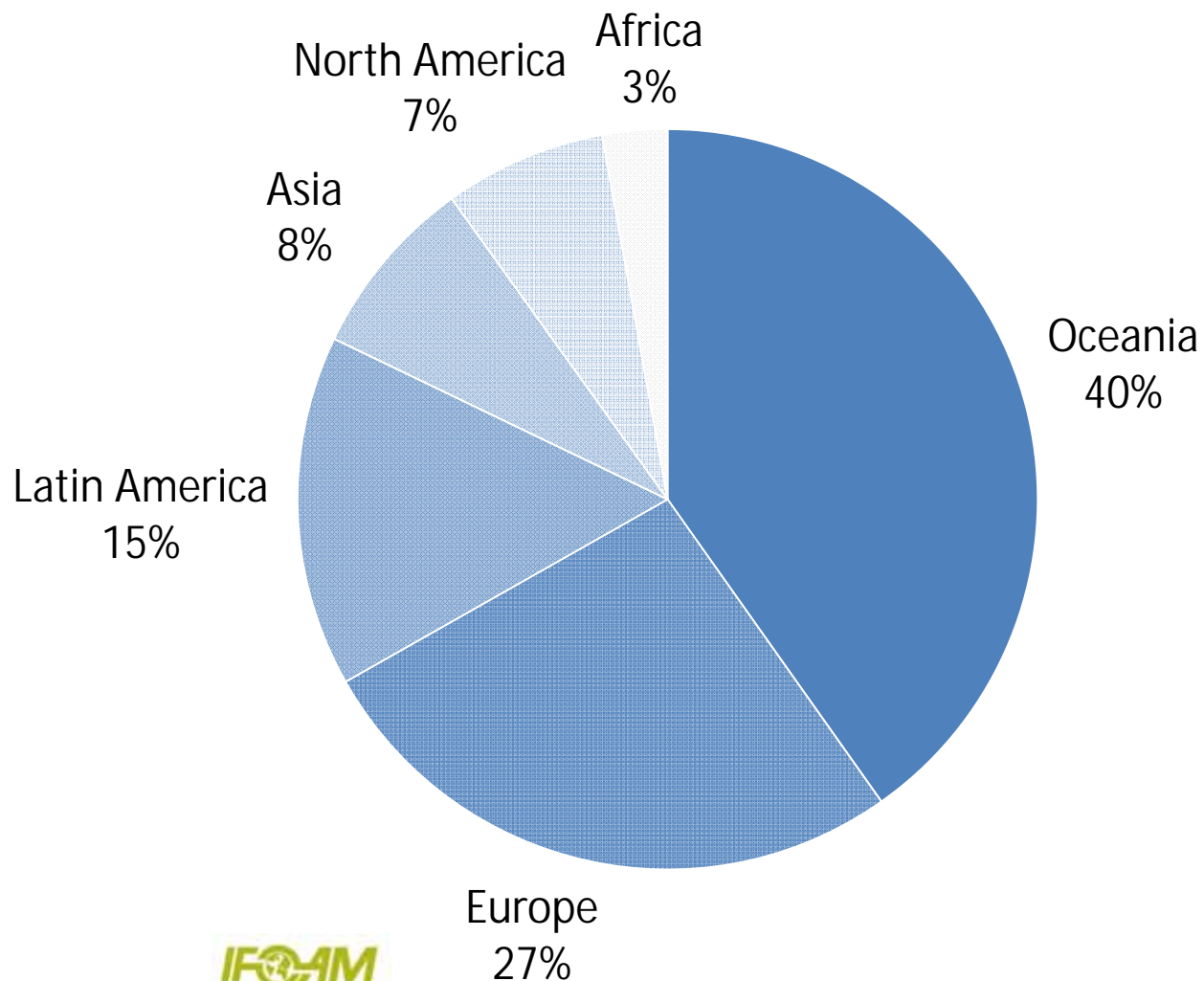
Organic agricultural land and other organic areas 2013



Organic agricultural land by region 2013

Distribution of organic agricultural land by region 2013

Source: FiBL-IFOAM Survey 2015



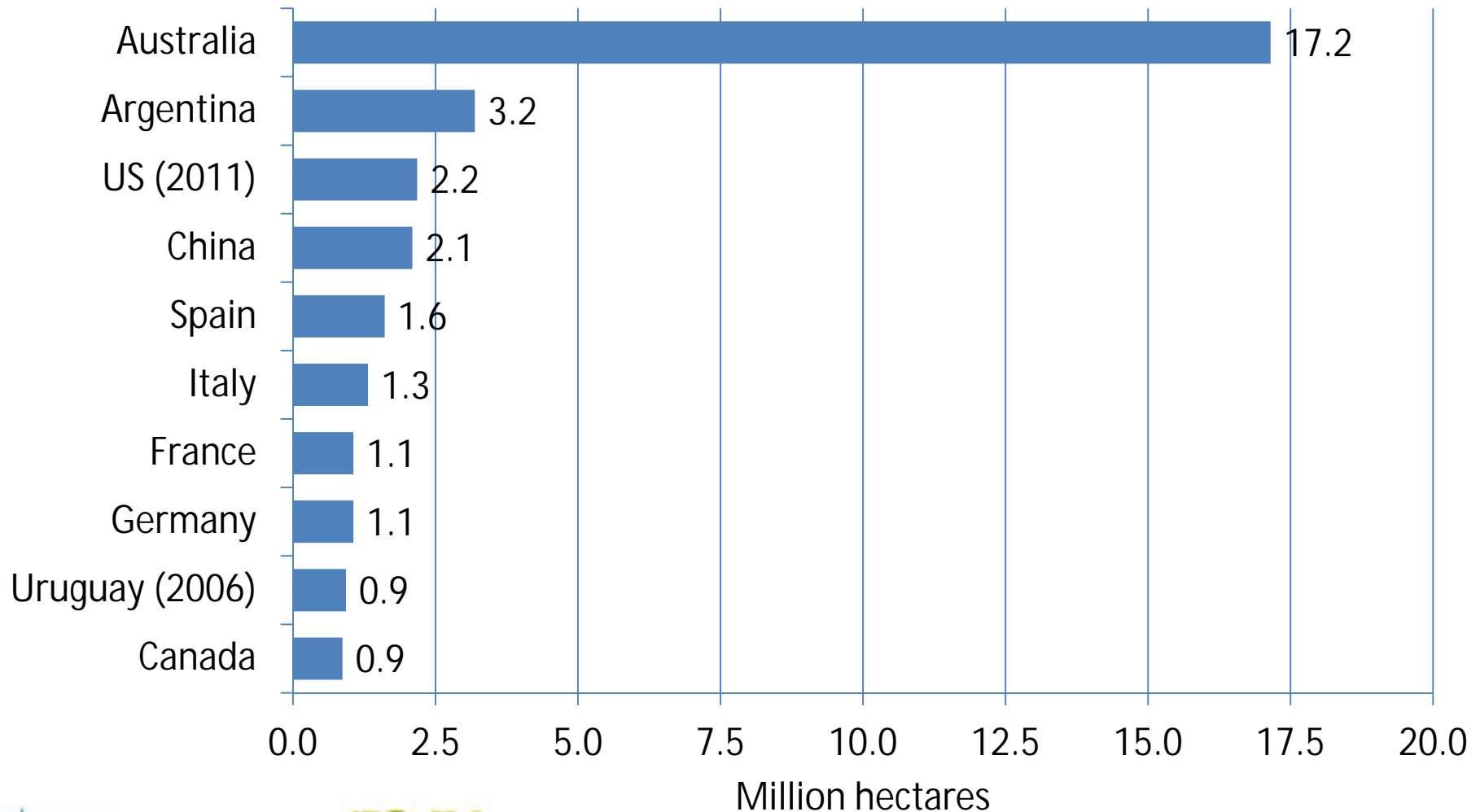
The countries with the most organic agricultural land 2013

- › Australia is the country with the most organic agricultural land, 97 percent of which is extensive grazing area.
- › Argentina is second, followed by the United States in third place.
- › The ten countries with the most organically managed agricultural land have a combined total of 30.5 million hectares, constituting more than seventy percent of the world's organic agricultural land.

Organic agricultural land 2013: Top ten countries

The ten countries with the largest areas of organic agricultural land 2013

Source: FiBL-IFOAM survey 2015



Share of organic land of total agricultural area 2013

- › The share of the world's organic agricultural of all agricultural land is 0.98 percent.
- › By region, the share is highest in Oceania (4.1 percent), followed by Europe with 2.4 percent and Latin America with 1.1 percent.
- › In the 27 countries of the European Union, the share of organically managed land is 5.7 percent. In the other regions, the share of organically managed land is less than one percent.
- › Eleven countries have more than 10 percent organic land and 15 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 the Falkland Islands (Malvinas), where several large sheep farms are working organically, followed by Liechtenstein (31 percent) and Austria (19.5 percent).
- › It is interesting to note that many island states have high shares.

Shares of organic agricultural land by region 2013

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2013

Region	Organic agr. land [ha]	Share of total agri. land*
Africa	1'222'374	0.1%
Asia	3'425'939	0.2%
Europe	11'460'773	2.4%
Latin America	6'611'636	1.1%
North America	3'047'710	0.7%
Oceania	17'321'733	4.1%
Total**	43'085'219	1.0%

Source: FiBL-IFOAM survey 2015.

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

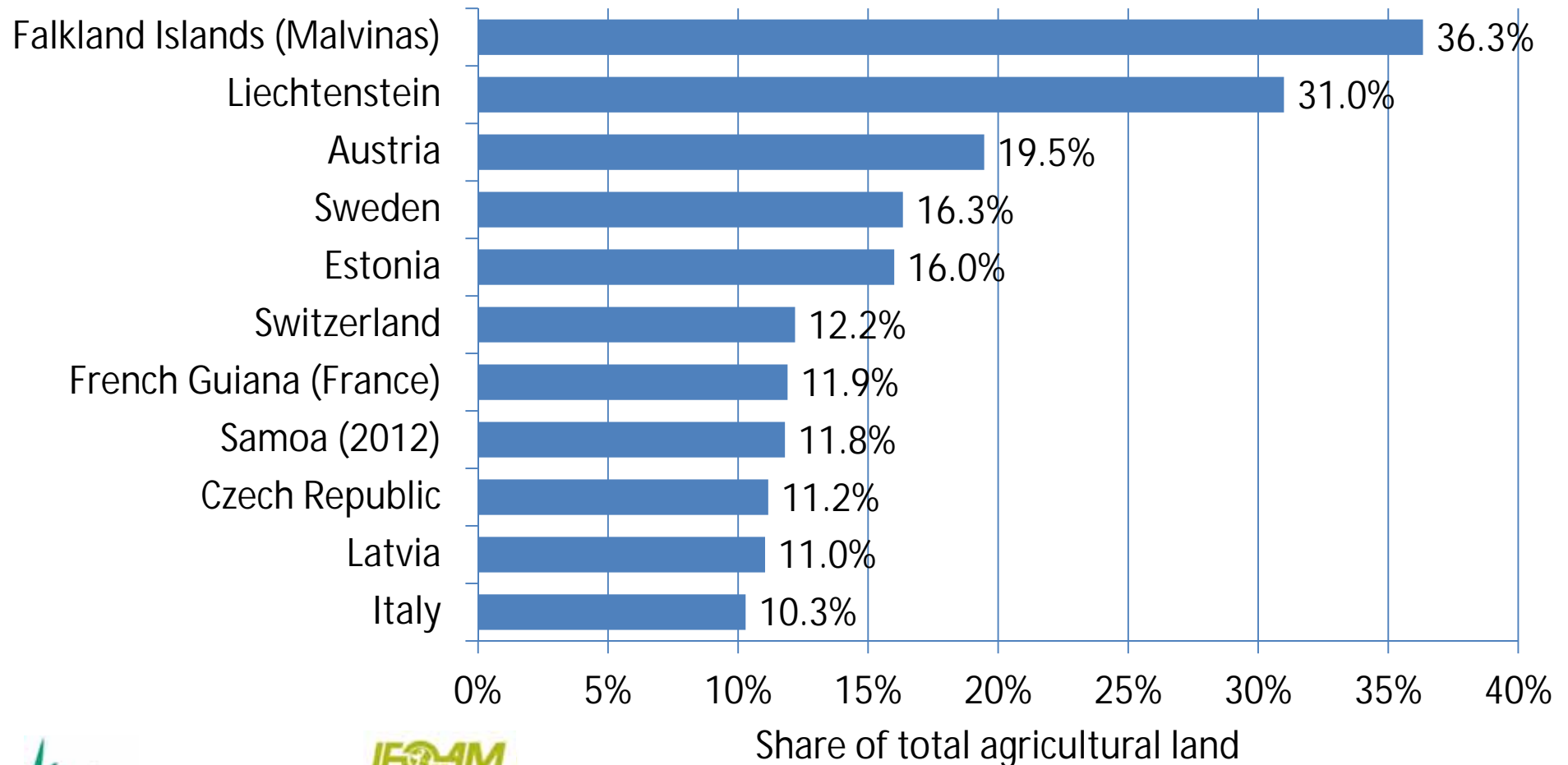
** Total includes correction value for French overseas departments.

(European Union: 5.7 %)

The highest shares of organic agr. land 2013

Countries with more than 10 percent of organic agricultural land 2013

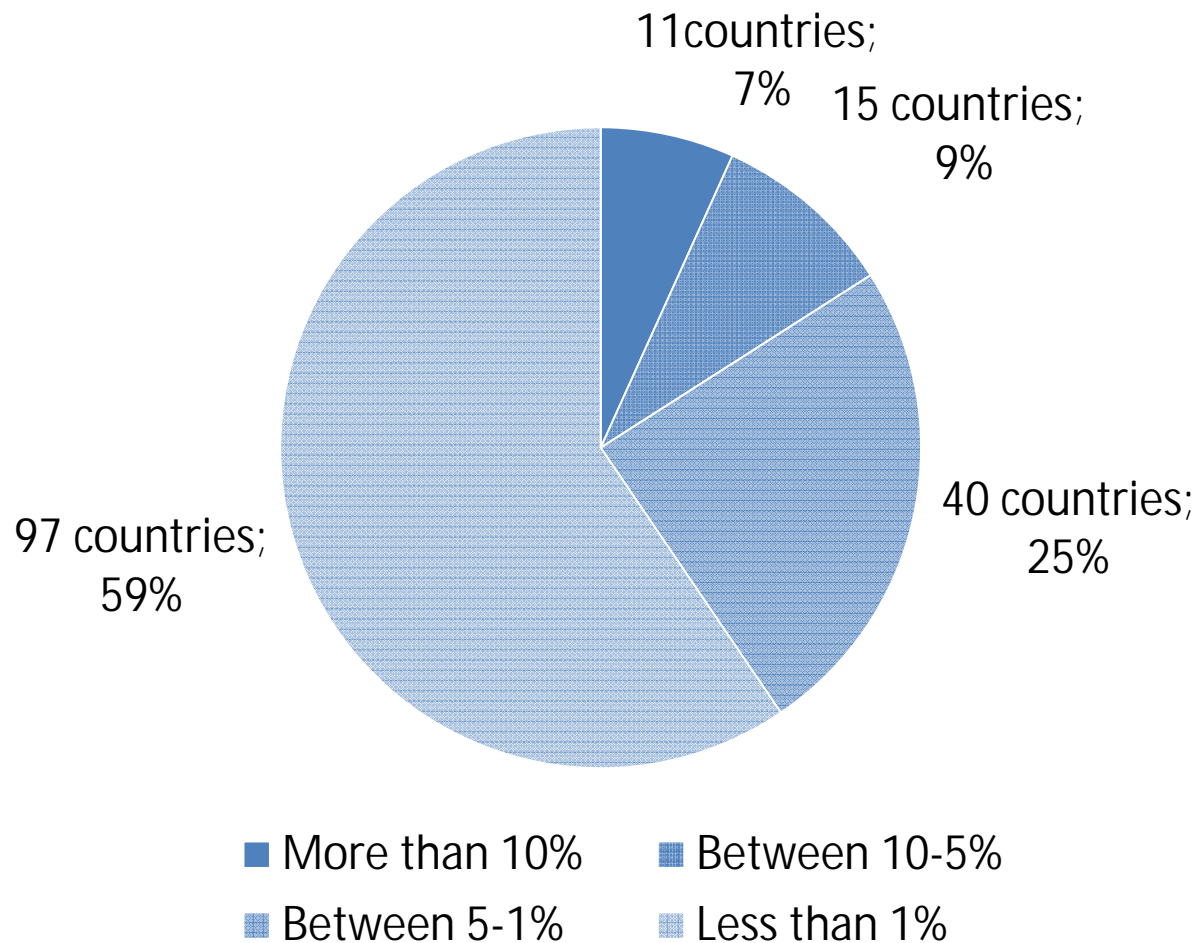
Source: FiBL-IFOAM survey 2015



Distribution of organic shares 2013

Distribution of the shares of organic agricultural land 2013

Source: FiBL-IFOAM Survey 2015



Growth of the organic agricultural land 2013

- › Compared with the revised data from 2012, the organic agricultural land has increased by 15 percent in 2013, almost 6 million hectares. This increase is due to the fact that in Australia, a 53 percent growth in fully certified organic land area occurred between 2011 and 2014, due to rangeland areas coming into organic production to meet the strong demand for organic beef (Australian Organic 2014).
- › Compared with 1999, when data on organic agriculture worldwide were available for the first time, the organic agricultural land has almost quadrupled.

Growth of the organic agricultural land 2012-2013 by region

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2012/2013

Region	Organic agr. land [ha] 2012	Organic agr. land [ha] 2013	+/- hectares	+/- percent %
Africa	1'149'461	1'222'374	+72'913	+6.34%
Asia	3'218'701	3'425'939	+207'237	+6.44%
Europe	11'135'208	11'460'773	+325'565	+2.92%
Latin America	6'813'540	6'611'636	-201'904	-2.96%
North America	3'012'354	3'047'710	+35'355	+1.17%
Oceania	12'164'316	17'321'733	+5'157'417	+42.40%
Total**	37'490'215	43'085'219	+5'595'003	+14.92%

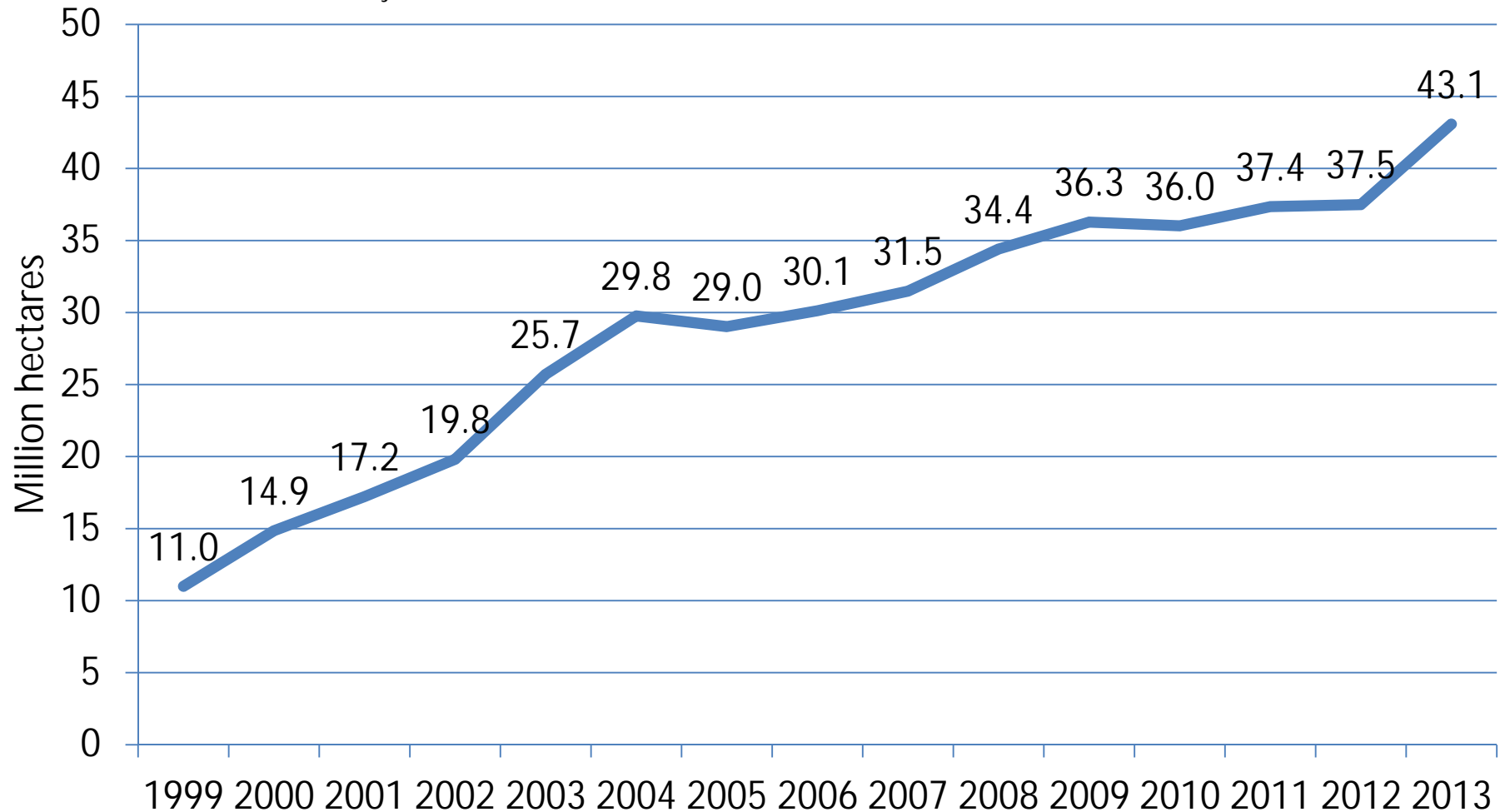
Source: FiBL-IFOAM survey 2015, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 281.

** Total includes correction value for French Overseas Departments.

Growth of the organic farmland 1999-2013

Growth of the organic agricultural land 1999-2013

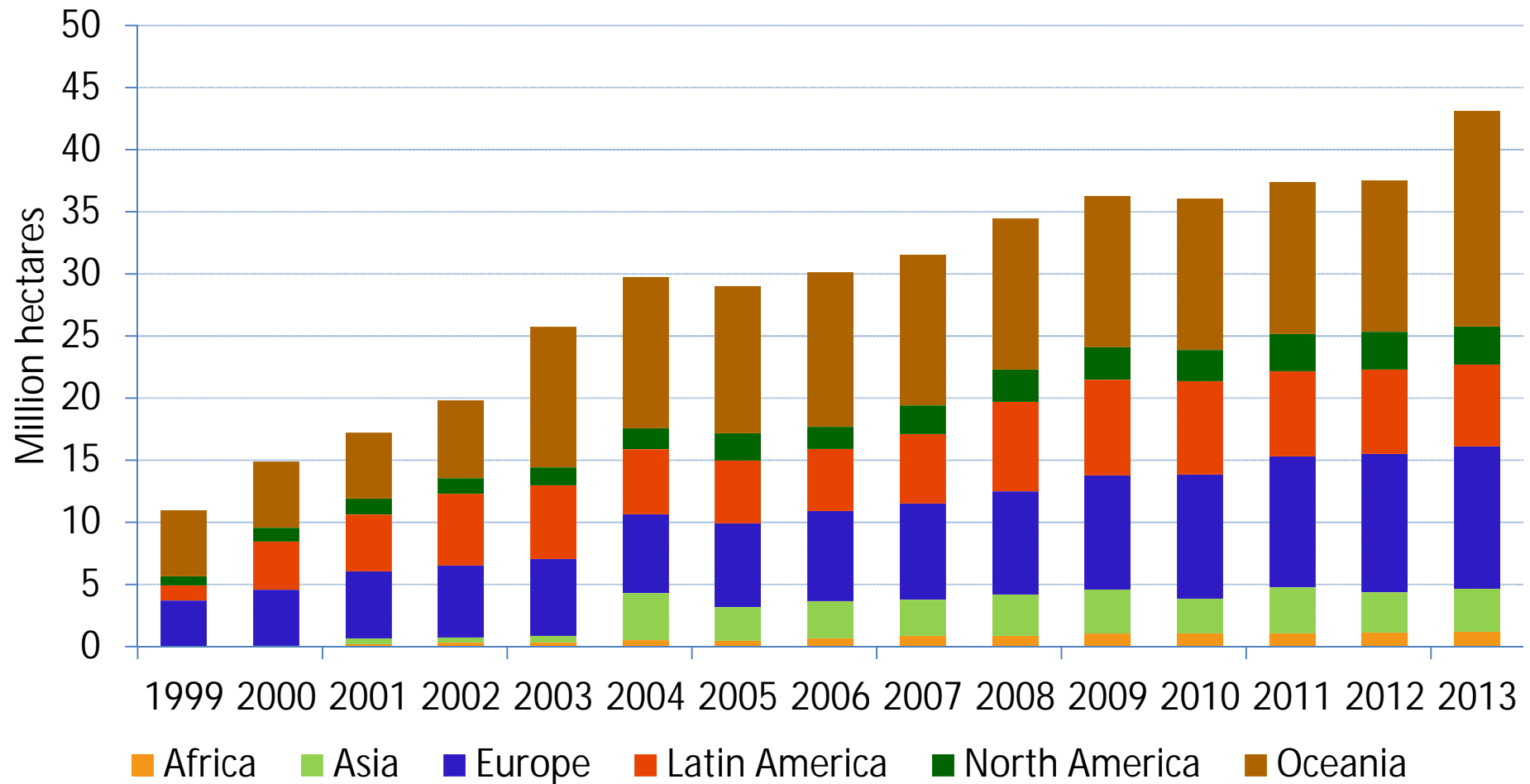
Source: FiBL-IFOAM-SOEL-Surveys 1999-2015



Development of organic agricultural land in the regions

Development of organic agricultural land in the regions 1999-2013

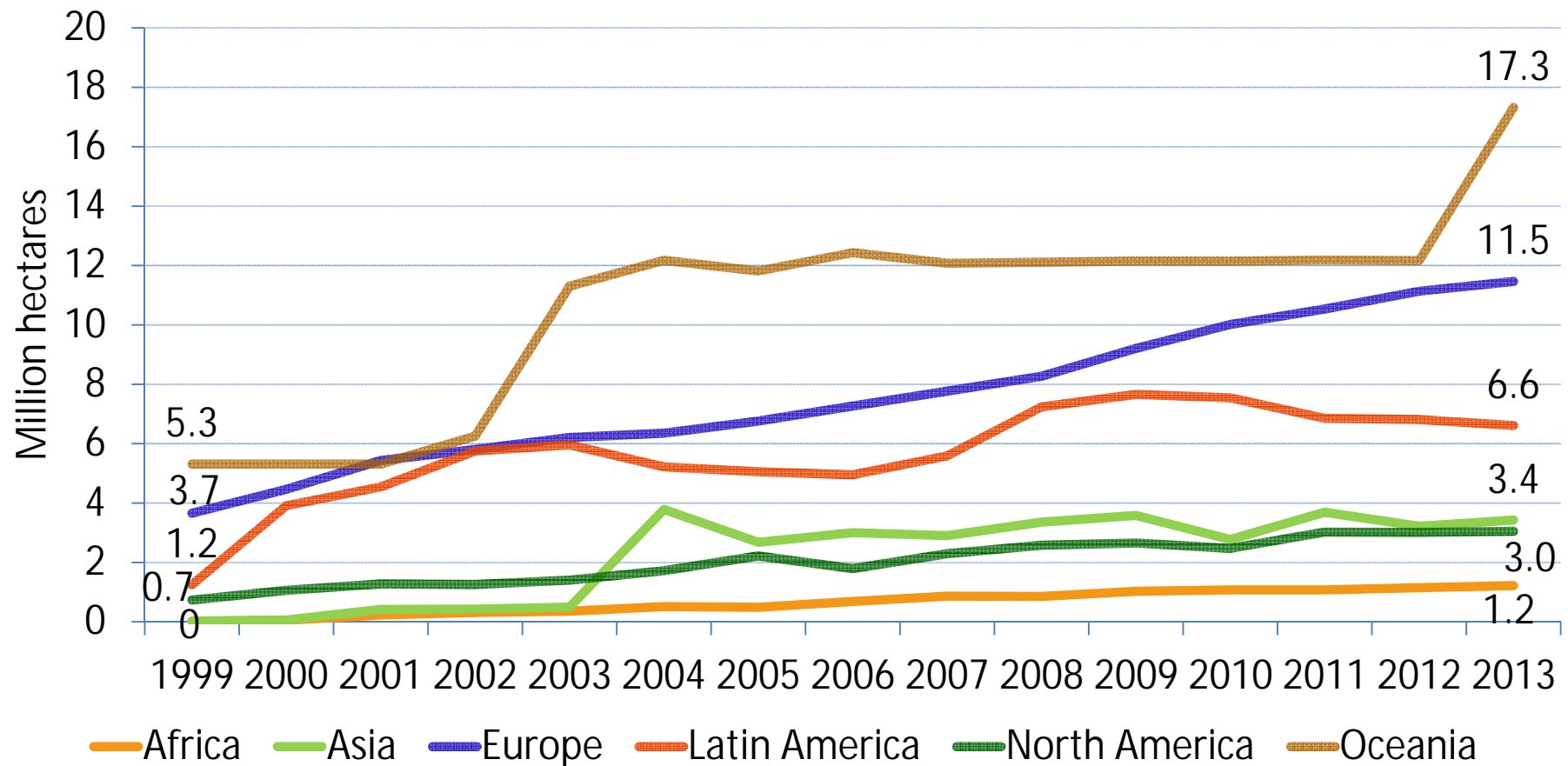
Source: FiBL-IFOAM-SOEL-Surveys 1999-2015



Growth of organic agricultural land by region 2013

Growth of the organic agricultural land by continent 1999-2013

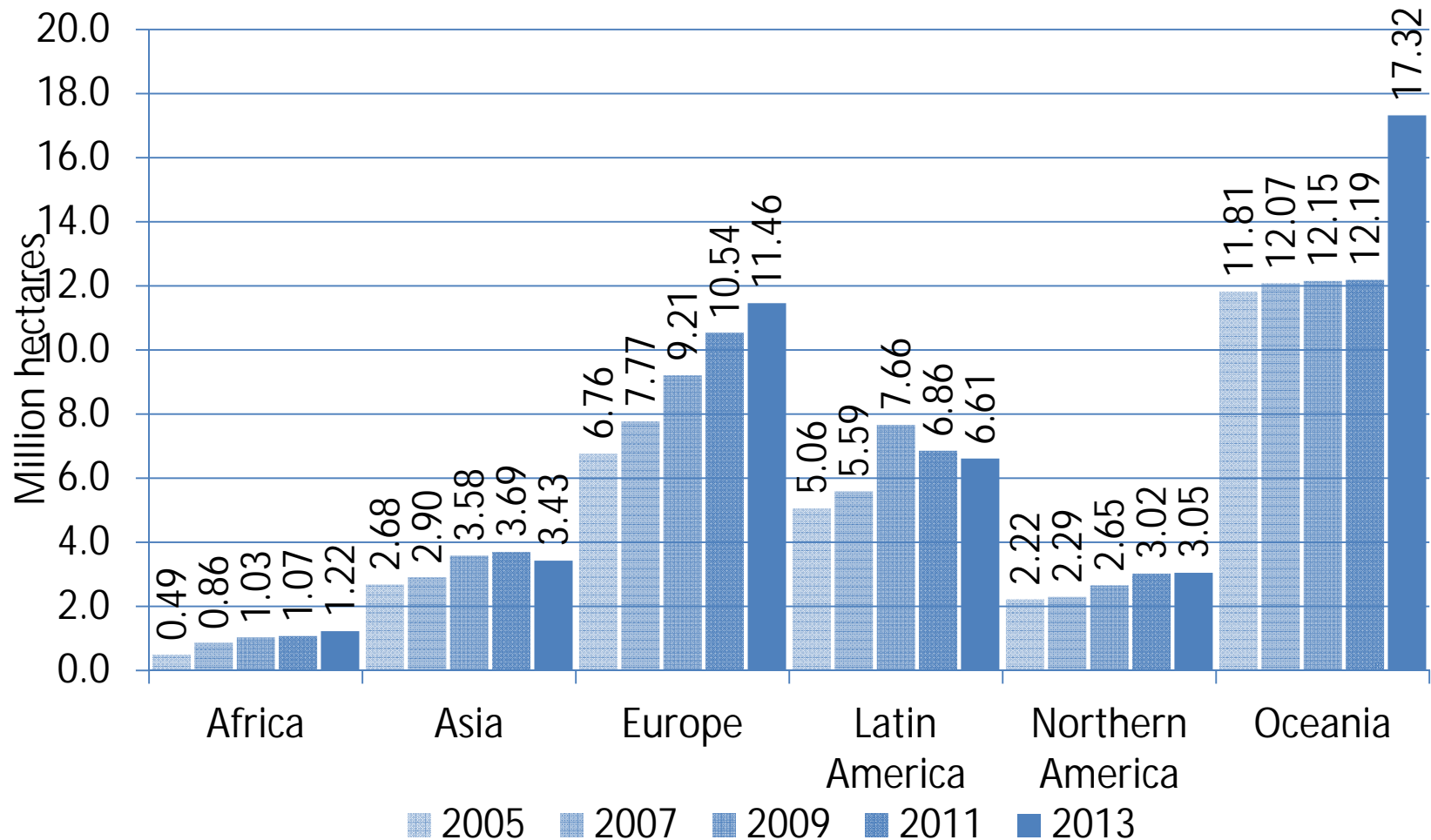
Source: FiBL-IFOAM-SOEL-Surveys 1999-2015



Growth of organic farmland by continent 2013

Growth of the organic agricultural land by continent 2005-2013

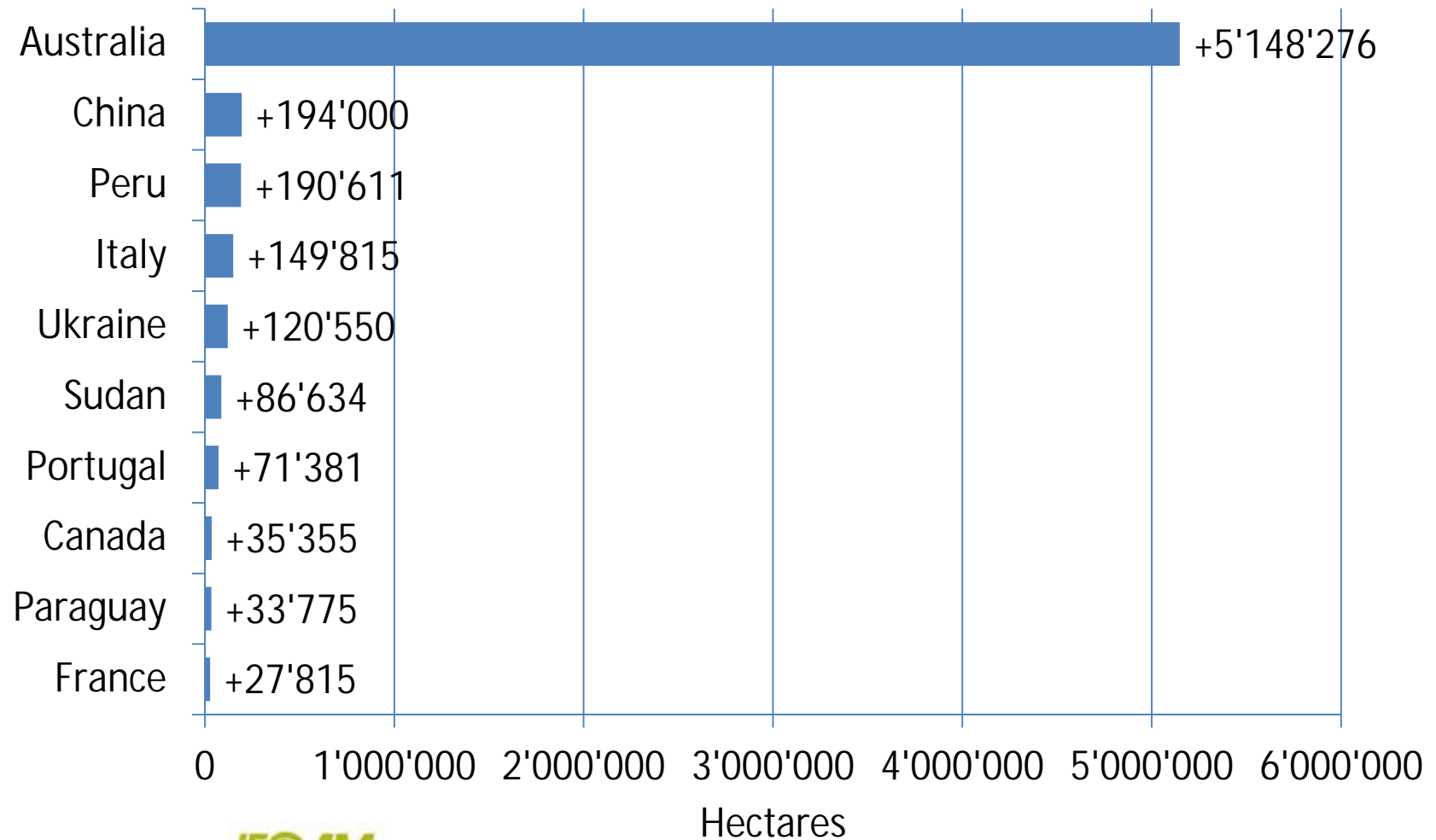
Source: FiBL-IFOAM survey 2015



Growth of organic farmland 2012-2013

The ten countries with the highest increase of organic land 2013

Source: FiBL-IFOAM survey 2015



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 million hectares.
- › In total, 78 million hectares – agricultural land and other areas – were organic in 2013.

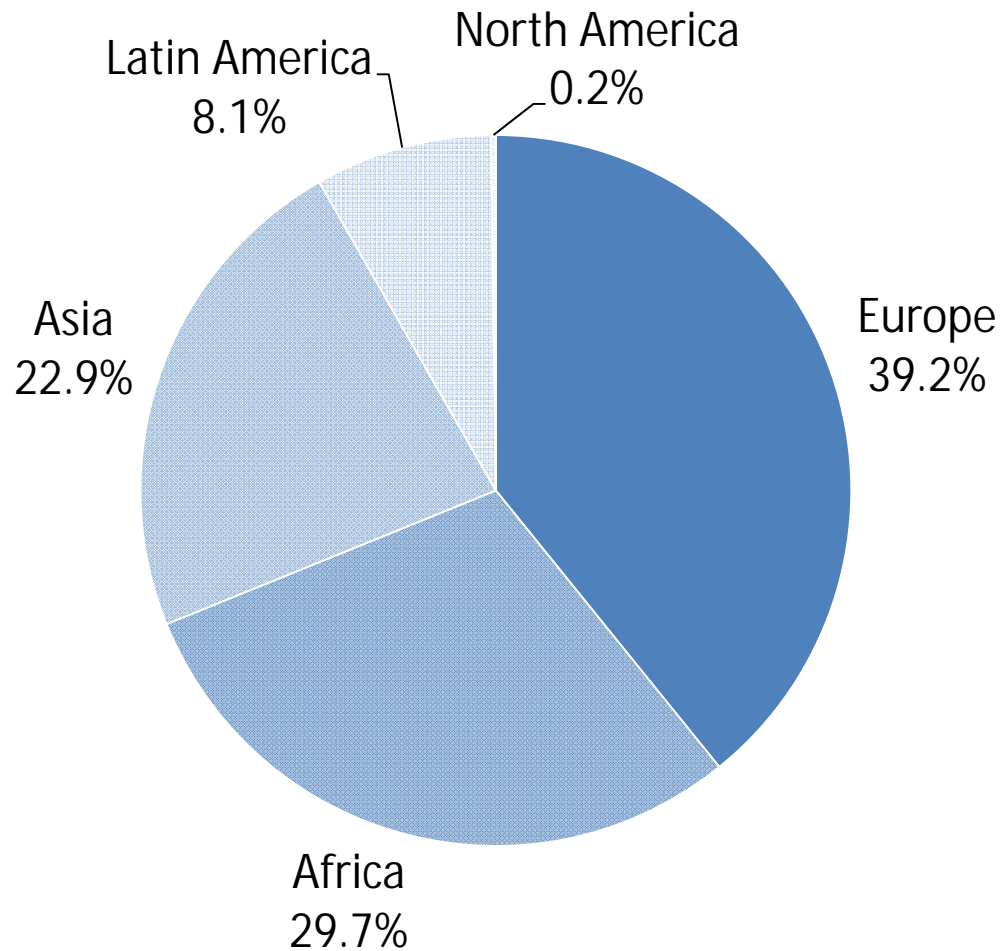
Wild collection and beekeeping areas

- › 34.1 million hectares of wild collection and bee-keeping areas were reported for 2013.
- › The wild collection / bee-keeping areas are more or less evenly distributed over four regions: Europe, Africa, Asia, and Latin America, reflecting quite a different pattern than that for agricultural land.
- › The collection of wild harvested crops is defined in the IFOAM Basic Standards (IFOAM 2014), and wild collection activities are regulated in organic laws.

Wild collection areas by region 2013

Distribution of organic wild collection areas by region 2013

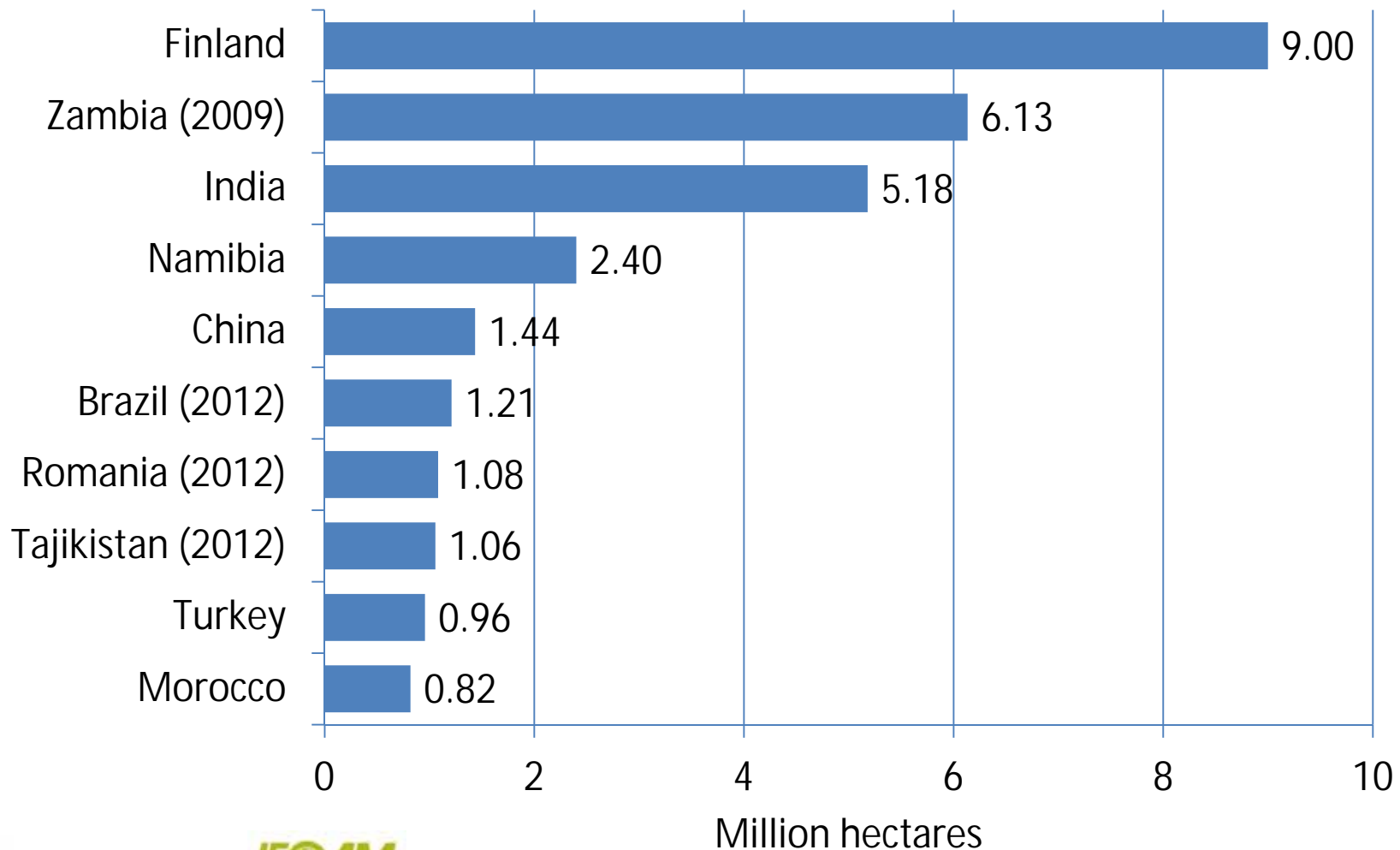
Source: FiBL-IFOAM Survey 2015



Organic wild collection 2013: Top 10 countries

The ten countries with the largest wild collection areas 2013

Source: FiBL-IFOAM survey 2015



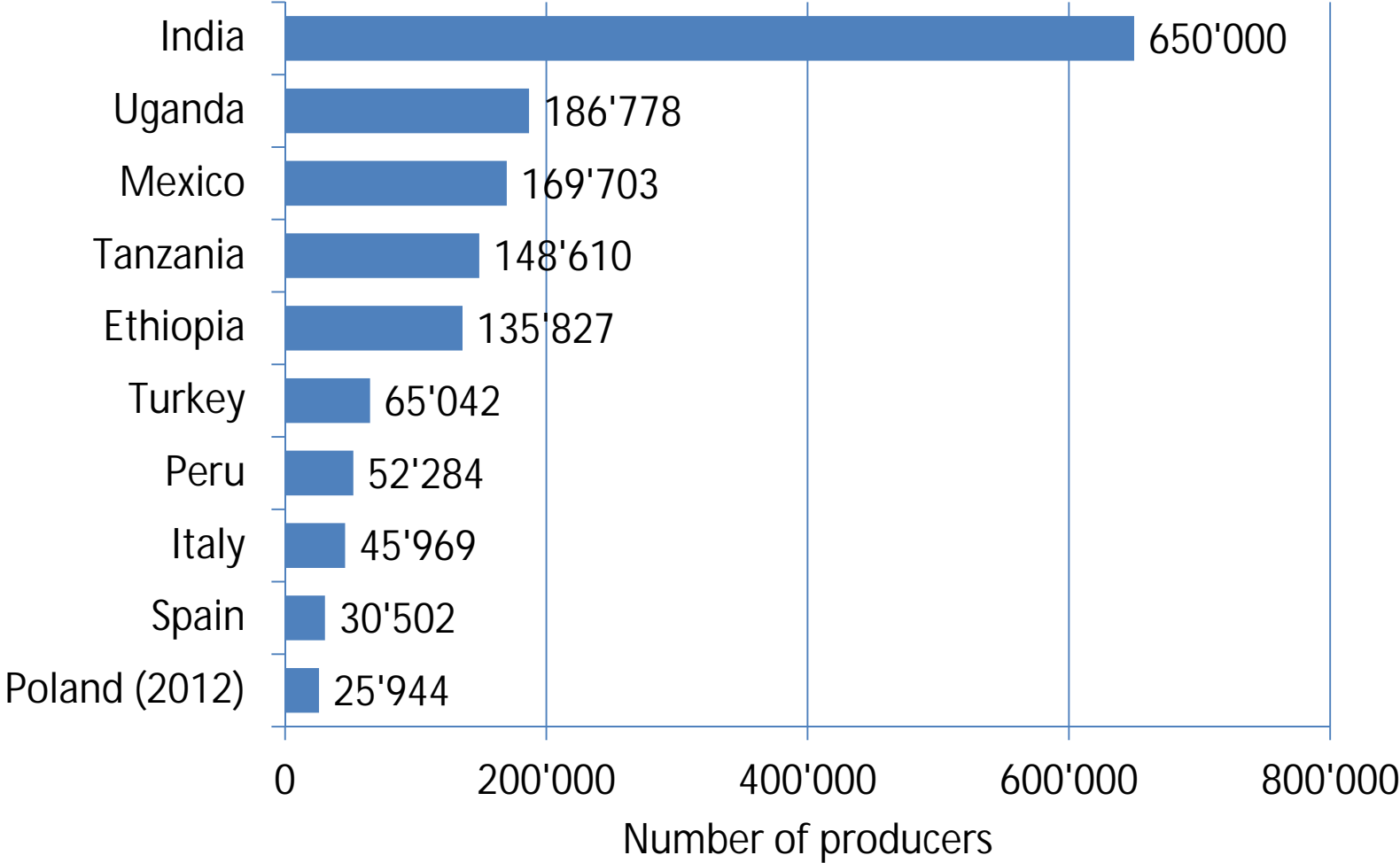
Organic producers 2013

- › For the current survey, a total of 2 million organic producers was reported,
- › According to the data obtained, more than three quarters of the producers are located in Asia, Africa and Latin America.
- › The country with the most producers is India (650'000), followed by Uganda (189'610) and Mexico (169'703).
- › This is an increase of more than 70'000 producers compared with 2012, or 5 percent.
- › It should be noted that not all certifiers reported the number of producers; the number is probably higher than 2 million.

Organic producers 2013

The ten countries with the largest numbers of organic producers 2013

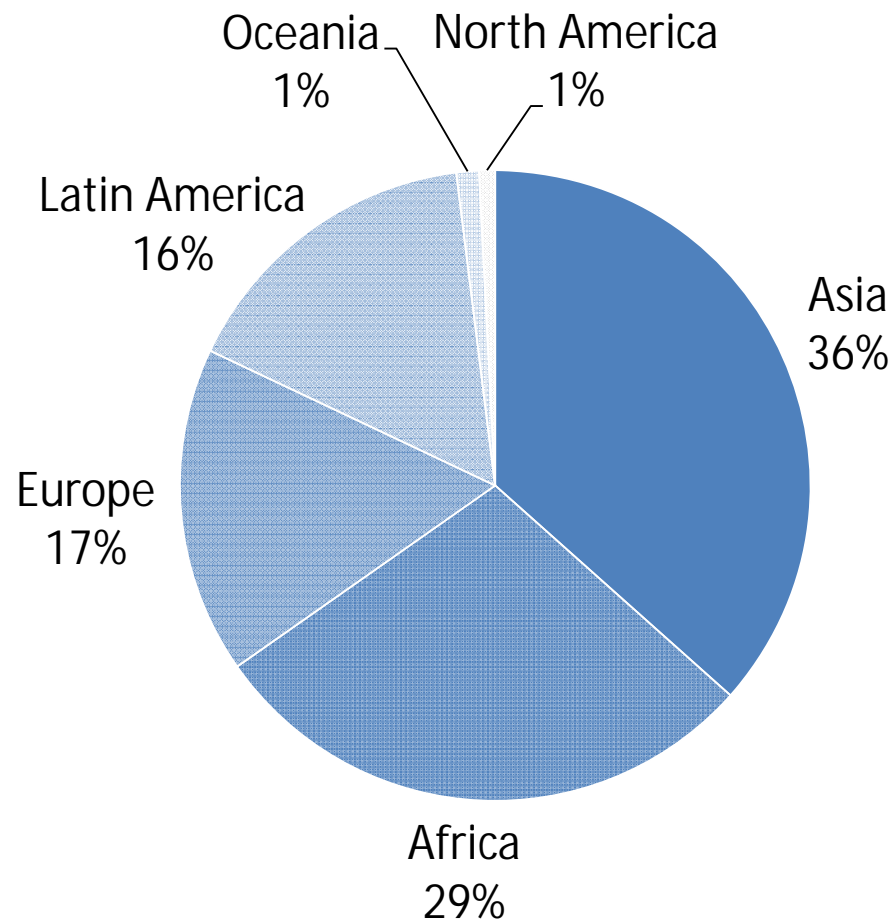
Source: FiBL-IFOAM survey 2015



Organic producers by region 2013

Organic producers by region 2013

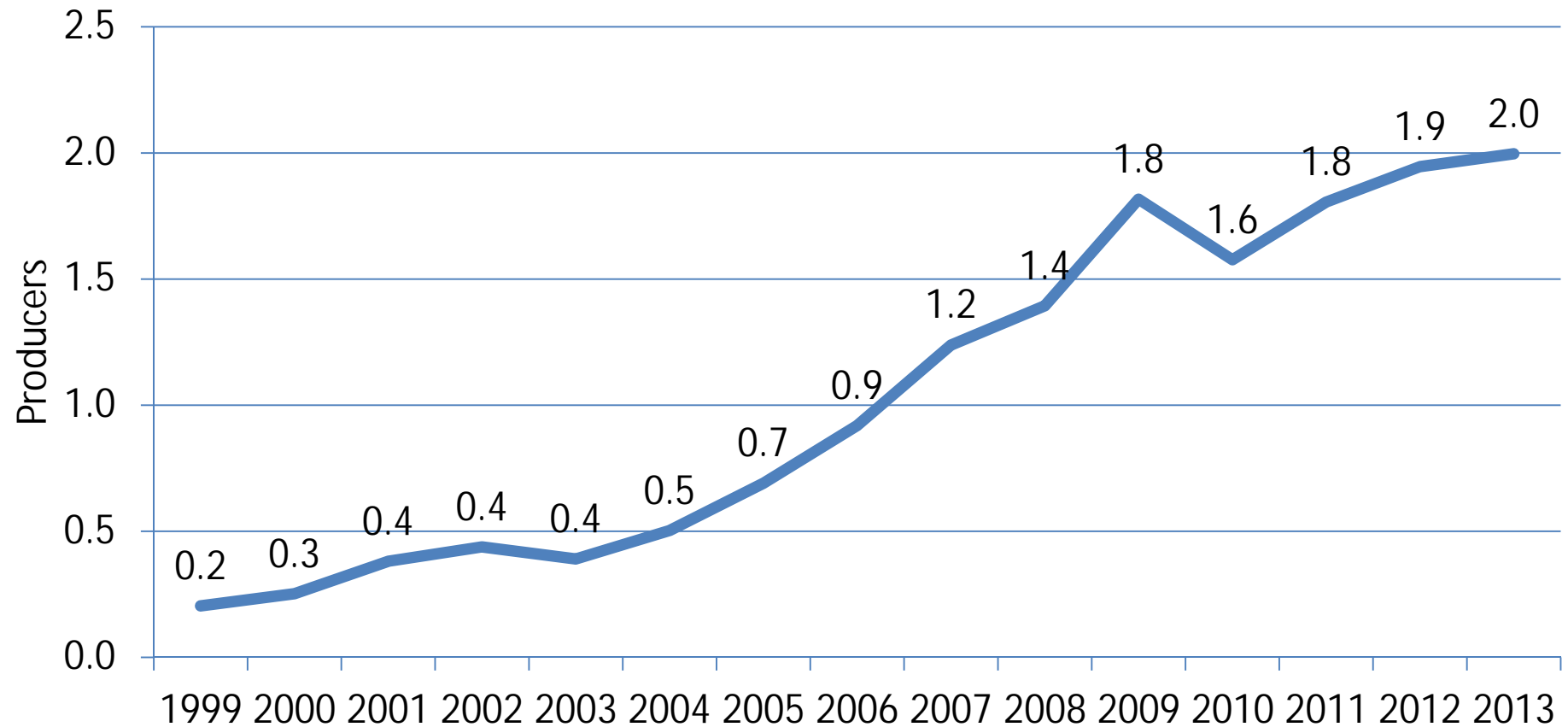
Source: FiBL-IFOAM Survey 2015



Development of organic producers 1999-2013

Development of the number of organic producers 1999-2013

Source: FiBL-IFOAM-SOEL-Surveys 1999-2015



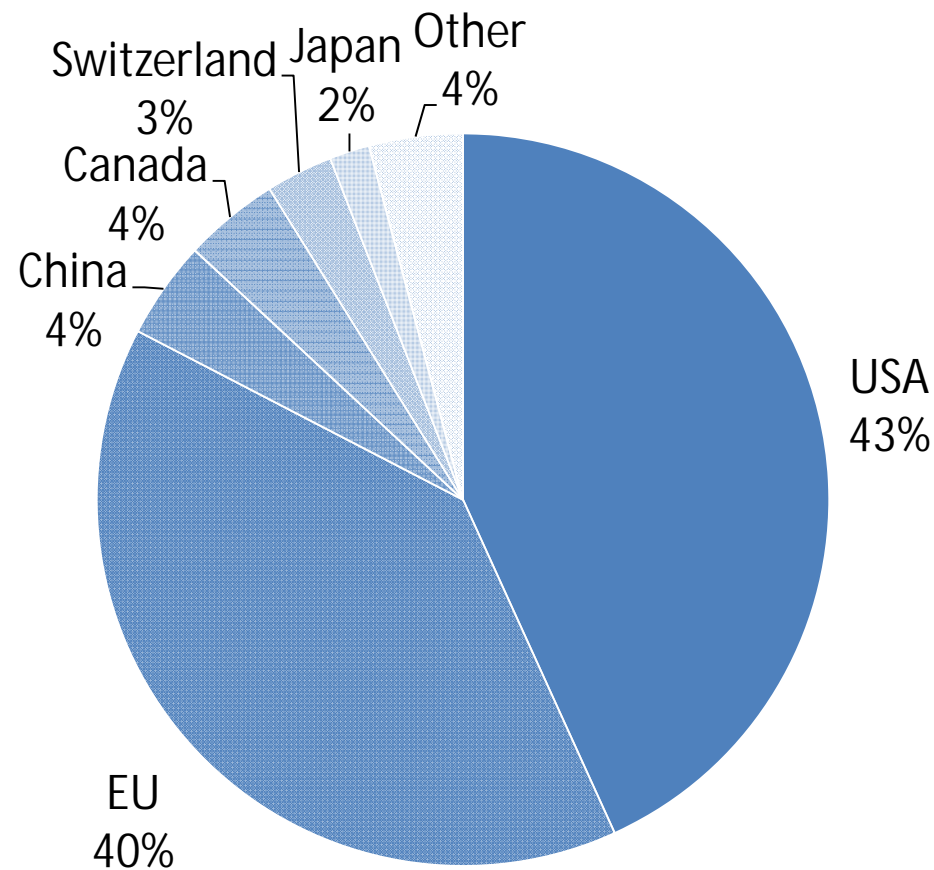
The global market for organic food and beverages 2013

- › In 2013, the global market for certified organic food and drink was estimated to be 72 billion US Dollars according to Organic Monitor (Sahota 2015).
- › The turnover with organic products has more than fivefold since 1999.
- › More than ninety percent of the organic product revenues is made in the North America and Europe (Sahota 2015).
- › In 2013, the by far largest market was the United States with 24.3 billion euros of organic food sales, followed by Germany with 7.6 billion euros and France with 4.4 billion euros (FiBL-AMI-OrganicDataNetwork 2015).
- › The highest annual per capita consumption was in Switzerland (210 euros) and in Denmark (163 euros) (FiBL-AMI-OrganicDataNetwork 2015).
- › Denmark, Switzerland and Austria have the highest share of organic food sales. In 2013 total food market value was not available for most of the countries, and it was therefore not possible to calculate the organic share for most countries.

Global market: Distribution of retail sales by single market 2013

Global market: Distribution of retail sales value by single markets 2013

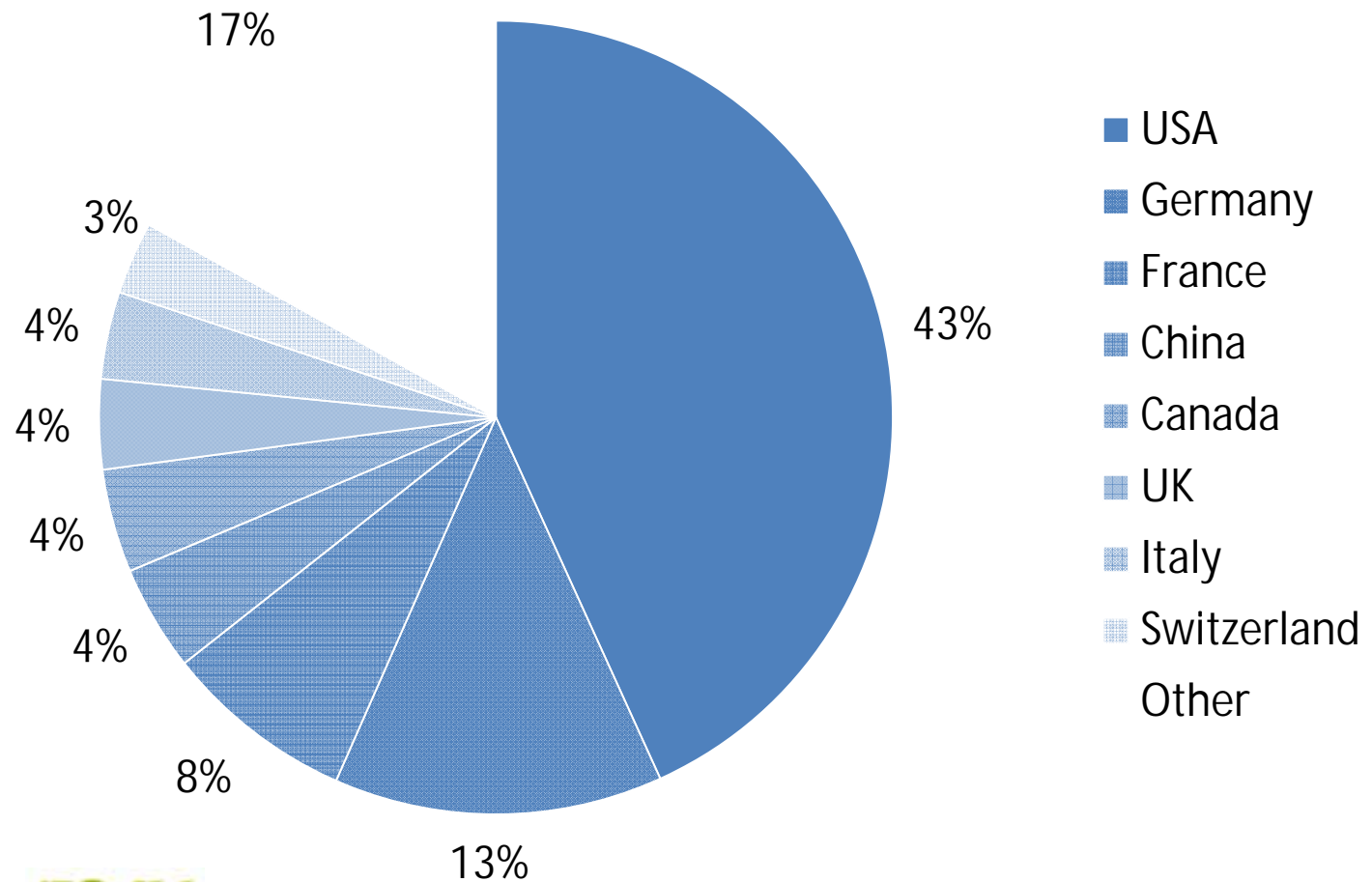
Source: FiBL-AMI-OrganicDataNetwork survey 2015, based on retail sales with organic food



Distribution of organic retail sales 2013

Global market: Distribution of retail sales value by country 2013

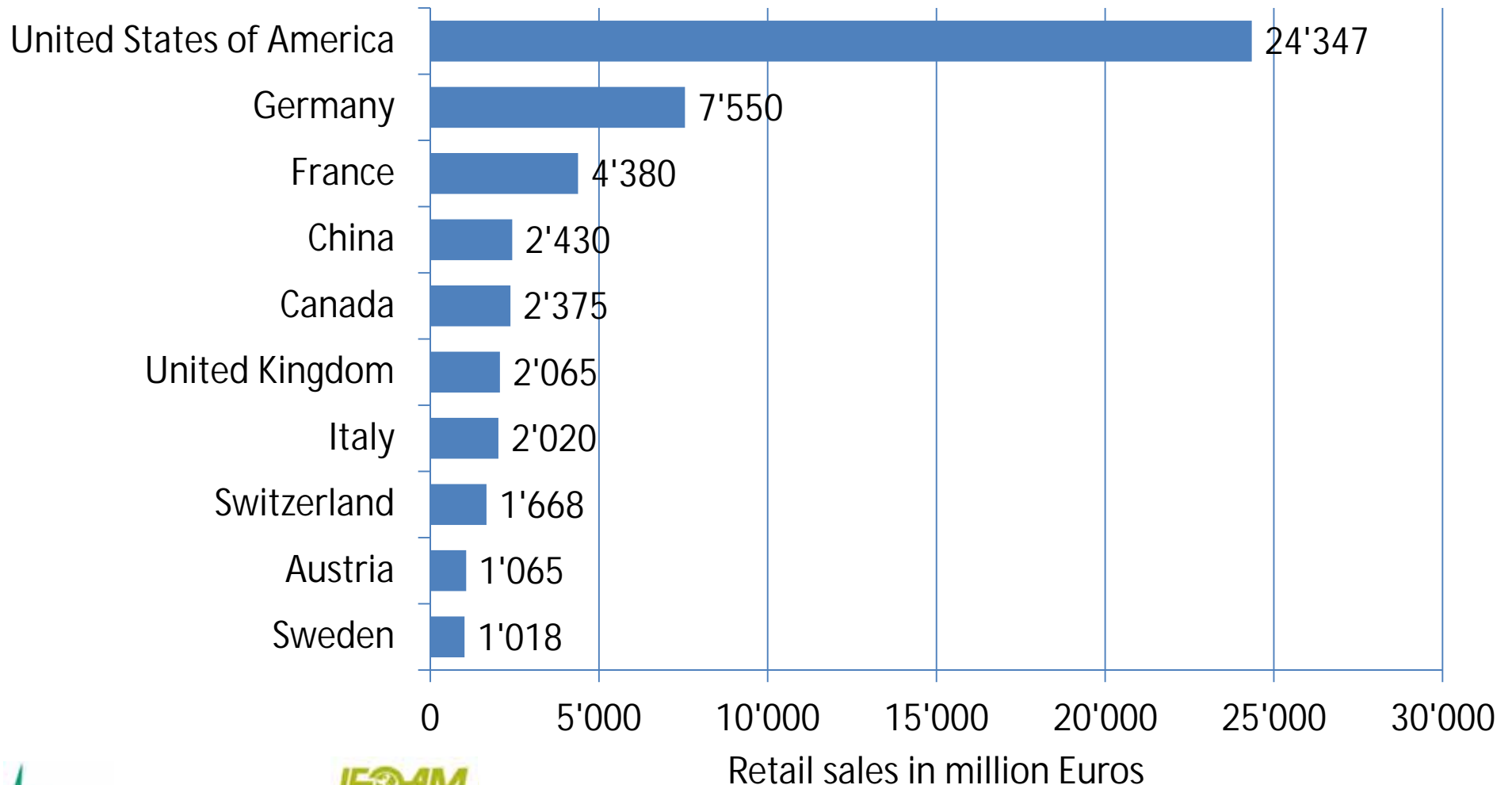
Source: FiBL-AMI-OrganicDataNetwork survey 2015, based on retail sales with organic food



The largest markets for organic food 2013

The ten countries with the largest markets for organic food 2013

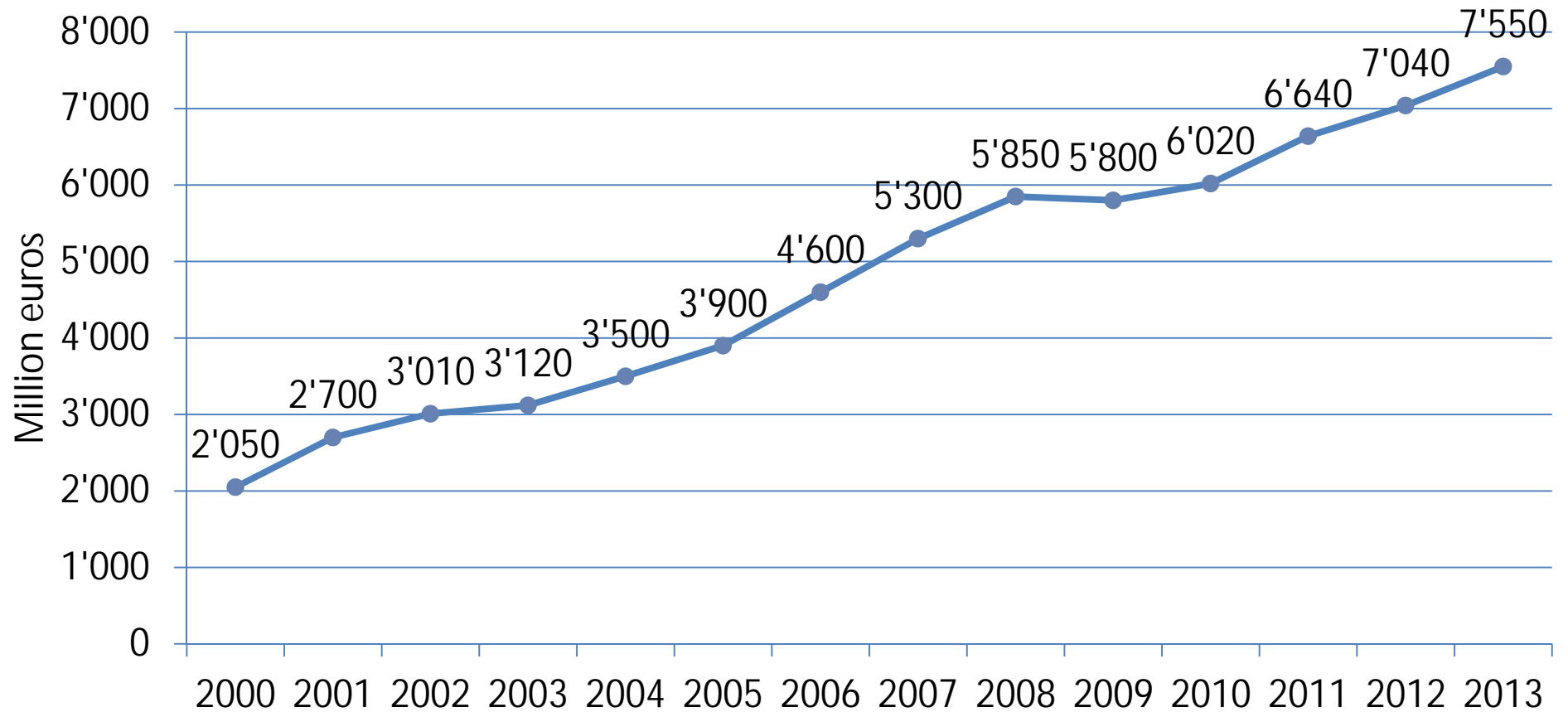
Source: FiBL-AMI-OrganicDataNetwork survey 2015



Growth of retail sales in Germany 2000-2013

Germany: Growth of organic food and beverages retail sales 2000-2013

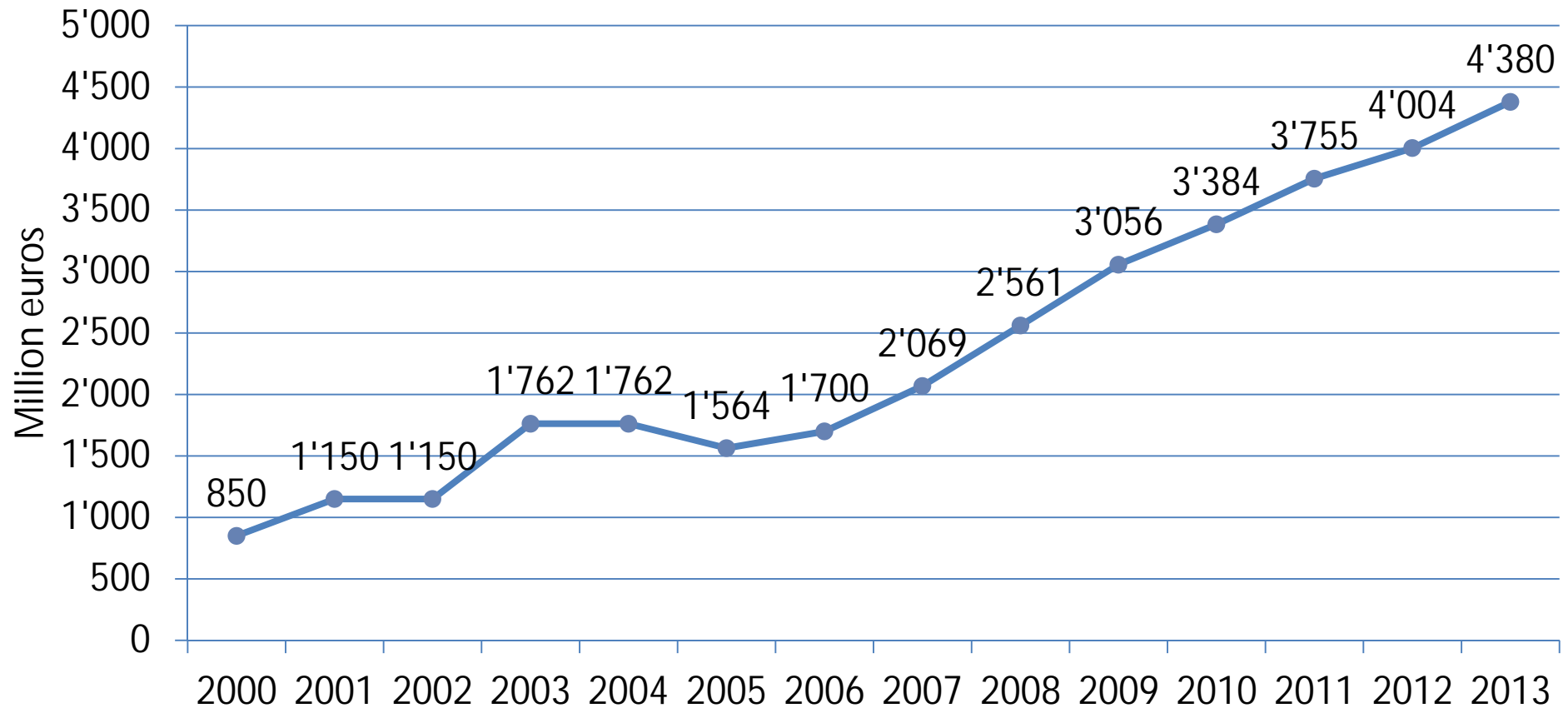
Source: FiBL-AMI surveys 2000-2015



Growth of retail sales in France 2000-2013

France: Growth of organic food and beverages retail sales 2000-2013

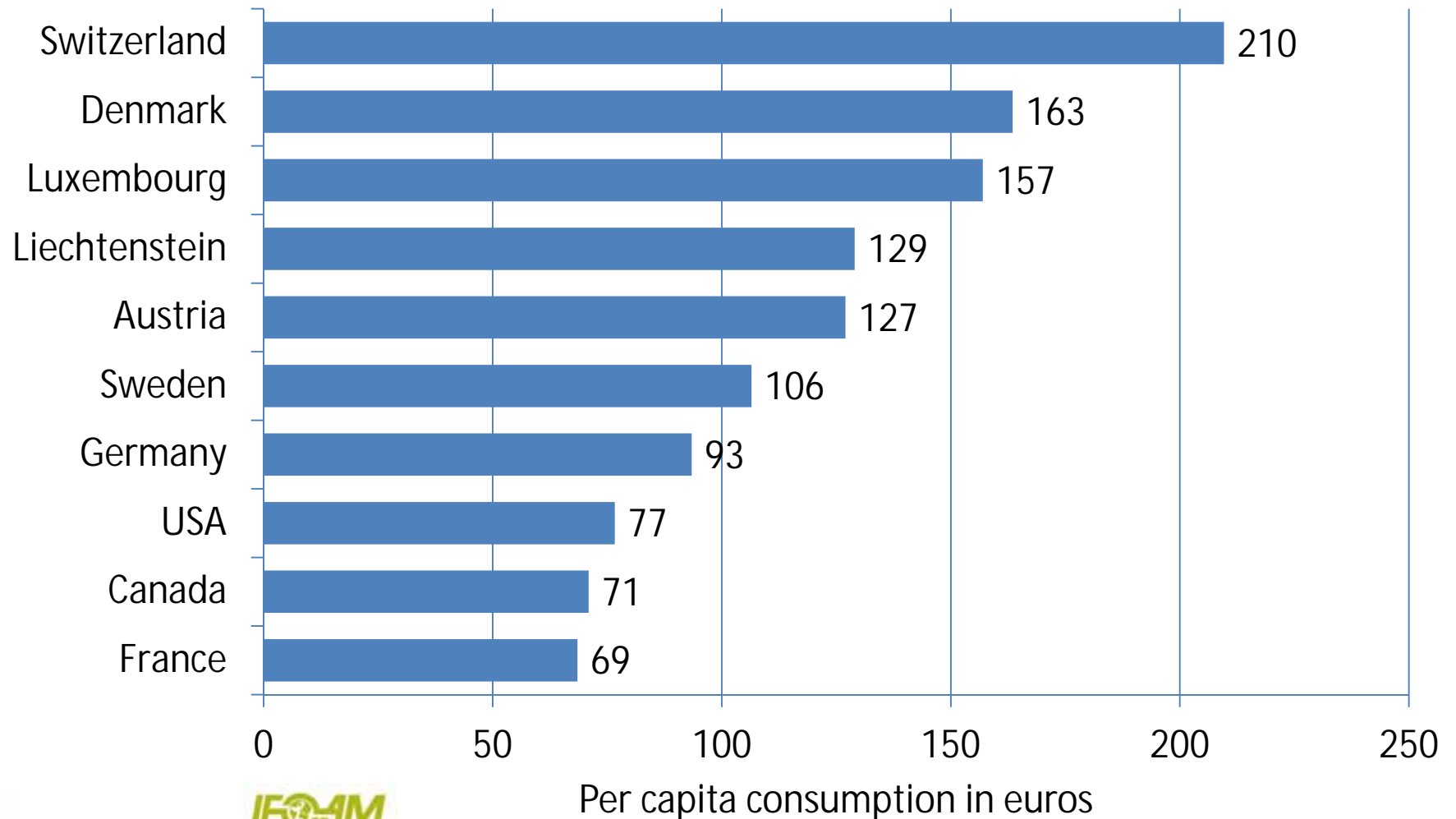
Source: FiBL-AMI surveys 2000-2015



Per capita consumption 2013

The ten countries with the highest per capita consumption 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015



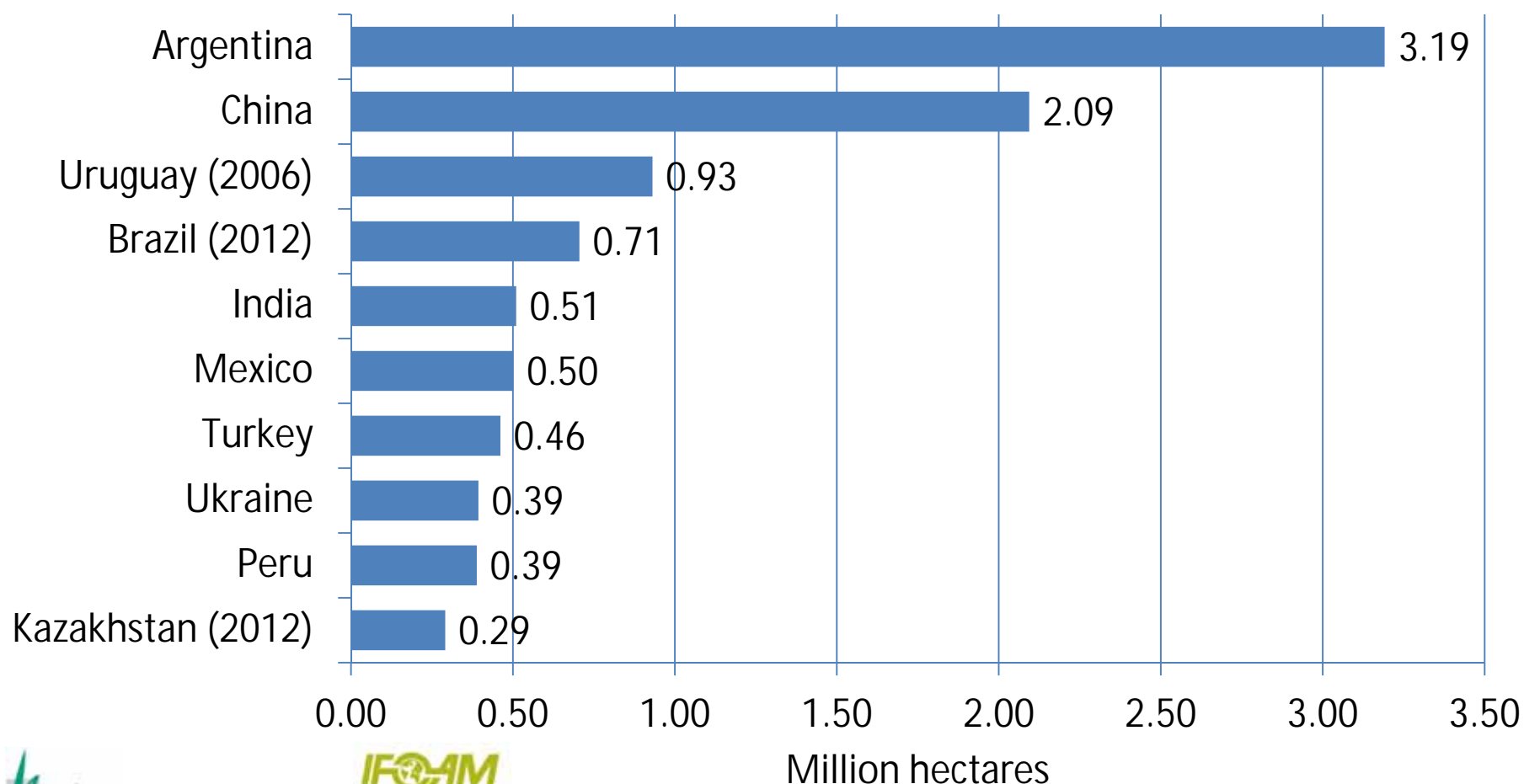
Organic farming in developing & transition countries 2013

- › Almost a quarter of the world's organic agricultural land – 11.7 million hectares - is located in developing/transition countries and in emerging markets.* Most of this land is in Latin American countries, with Asia and Africa in second and third place.
- › 1.7 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 https://www.uni-hohenheim.de/fileadmin/einrichtungen/fsc/DAC_Laenderliste_Berichtsjahre_2011_2013.pdf

DAC list: The top 10 countries with the largest areas of organic agricultural land 2013

The ten countries on the DAC list with the largest areas of organic agricultural land 2013

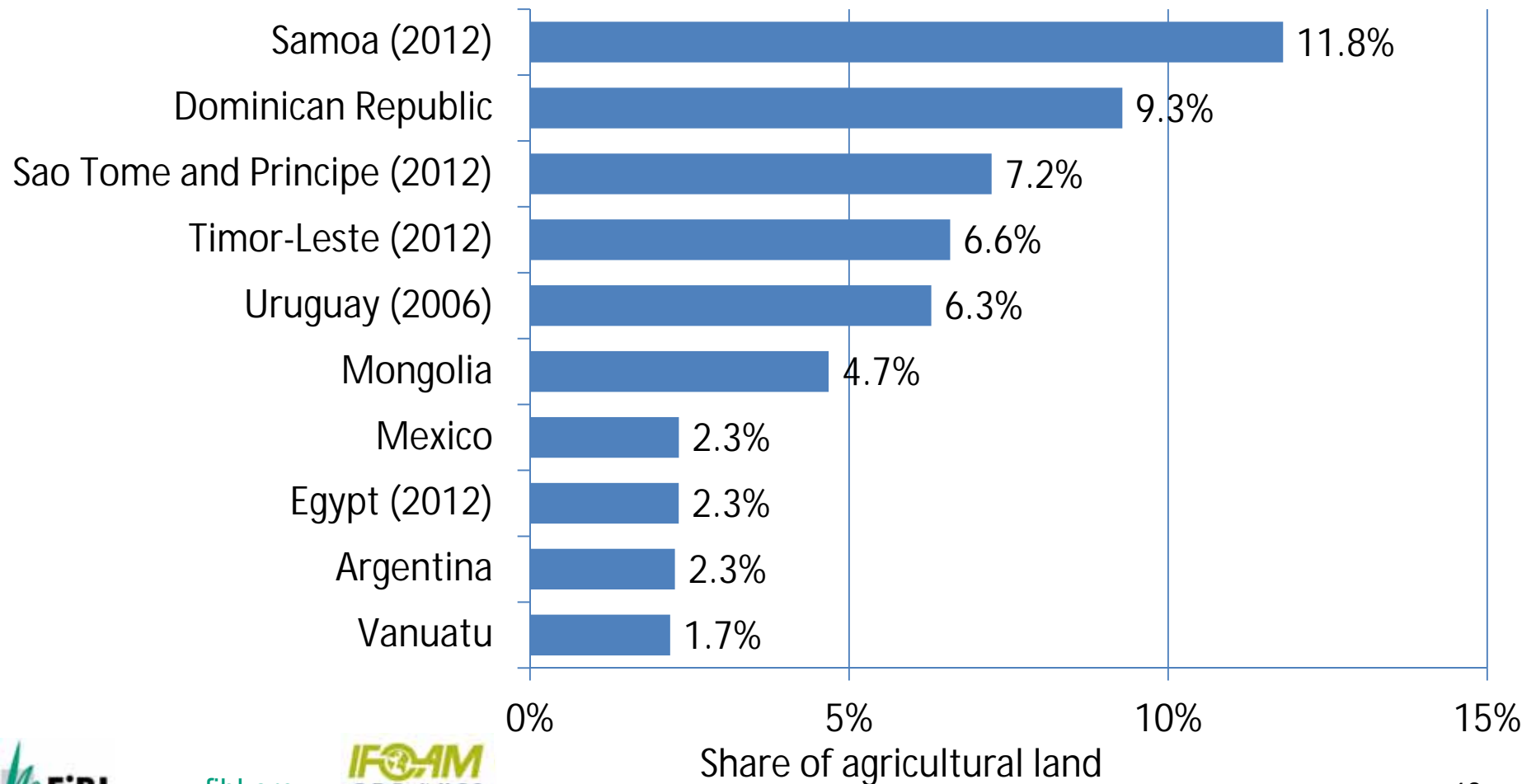
Source: FiBL-IFOAM survey 2015



DAC list: The top 10 countries with the highest shares of organic agricultural land 2013

The ten countries on the DAC list with the highest shares of organic agricultural land 2013

Source: FiBL-IFOAM survey 2015



More information

- › More information (PDF, data sources, graphs) at <http://www.organic-world.net/yearbook/yearbook2015.html>
- › Contact
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Disclaimer

- › All of the results contained in this slide show have been compiled by the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM). However, the possibility of mistakes cannot be ruled out entirely. Therefore, they are not subject to any obligation and make no guarantees whatsoever regarding any of the statements or results in this work; neither do they accept responsibility or liability for any possible mistakes, nor for any consequences of actions taken by readers based on statements or advice contained therein.
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- › Some work for this publication was undertaken as part of the research project titled "Data network for better European organic market information" (OrganicDataNetwork). This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement no 289376. The opinions expressed in this contribution are those of the authors and do not necessarily represent the views of the European Commission.