FiBL AND IFOAM

THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2015

OCEANIA 17.3 MILLION HA

EUROPE 11.5 MILLION HA

LATIN AMERICA 6.6 MILLION HA

ASIA 3.4 MILLION HA

NORTH AMERICA 3.0 MILLION HA

AFRICA 1.2 MILLION HA

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AFRICAN ORGANIC AGRICULTURE TRAINING MANUAL

The Research Institute of Organic Agriculture (FiBL) in collaboration with the International Federation of Organic Agriculture Movements (IFOAM) and African national organic agriculture movements (NOGAMU, FENAB and OPPAZ), as well as individual experts from Africa, developed a training manual and corresponding training tools on organic agriculture for Africa.

The African Organic Agriculture Training Manual aims to encourage the implementation of organic and other sustainable farming practices, increase market access for farmers, and improve food security throughout Africa. The training materials are designed for farmers, extension workers, trainers and university students.

The training materials include:

- A training guide with technical and didactical information
- Illustrated presentation materials
- Illustrated flyers and booklets for farmers
- A video on marketing

It it envisaged that the manual is completed and more training videos, posters and scripts for radio programs will be produced. Some translations are in progress.

African organizations are invited to test and validate the training tools and to provide feedback so that the training materials can be improved.

Version 1.0 of the training materials is available for free download at **www.organic-africa.net**. This website also provides a directory of organic agriculture in Africa with useful addresses and resource materials for farmers and trainers.

For those interested, CDs of the manual and DVDs of the video are available at FiBL upon request. In Africa the CDs and DVDs will be available at ecological organic agriculture stakeholder institutions such as AfrONet (Tanzania), ISD (Ethiopia), PELUM Association (Regional Secretariat Lusake, Zambia), FENAB (Senegal), and others to be identified.

For further information contact:
Research Institute of Organic Agriculture (FiBL) | Ackerstrasse 113 | P.O.Box 219 | 5070 Frick Switzerland | Tel. +41 (0)62 865 72 72 | info.suisse@fibl.org | www.fibl.org

International Federation of Organic Agriculture Movements (IFOAM) | Charles-de-Gaulle-Str. 5 53113 Bonn | Germany | Tel. +49 (0)228 926 50-10 | headoffice@ifoam.org | www.ifoam.org

Research Institute of Organic Agriculture FiBL &

IFOAM – Organics International

The World of Organic Agriculture

Statistics and Emerging Trends 2015

For PDF version, corrigenda and supplementary material see
http://www.organic-world.net/yearbook-2015.html

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Should corrections and updates become necessary, they will be published at www.organic-world.net. This book is available for download at http://www.organic-world.net/yearbook-2015.html

Any enquiries regarding this book and its contents should be sent to Julia Lernoud and Helga Willer, FiBL, Ackerstrasse 113, 5070 Frick, Switzerland, e-mail julia.lernoud@fibl.org and helga.willer@fibl.org.

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Research Institute of Organic Agriculture (FiBL), Ackerstrasse113, 5070 Frick, Switzerland,
Tel. +41 62 865 72 72, Fax +41 62 865 72 73, e-mail info.suisse@fibl.org, Internet www.fibl.org
International Federation of Organic Agriculture Movements (IFOAM – Organics International), Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, Tel. +49 228 926 50-10, Fax +49 228 926 50-99,
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Glossary

€/person: Per capita consumption in euros
AMI: Agrarmarkt-Informationsgesellschaft - Agricultural Market Information Company, Germany
AROS: Asia Regional Organic Standard
ASOA: ASEAN Standard for Organic Agriculture
ASEAN: Association of Southeast Asian Nations
CAP: Common Agricultural Policy of the European Union
CIHEAM: Centre international de hautes études agronomiques méditerranéennes
CPC: Candidates and Potential Candidates for the European Union
CTAB: Technical Center of Organic Agriculture, Tunisia
CNCA: China National Certification and Accreditation Administration
COROS: Common Objectives and Requirements of Organic Standards (COROS) are the Standards Requirements of IFOAM – Organics International
COTA: Canada Organic Trade Association, Canada
DGAB: Direction Génerale de l'Agriculture Biologique, Tunisia
EACCE: Etablissement Autonome de Contrôle et Coordination et des Exportations
EFTA: European Free Trade Association
EIP-AGRI: European Innovation Partnership for Agricultural Productivity and Sustainability
EOA: Ecological Organic Agriculture; Ecological Organic Agriculture Initiative for Africa
EU: European Union
EU-13: The countries that became a member of the European Union in or after May 1, 2004
EU-15: Member countries in the European Union prior to the accession of ten candidate countries on 1 May 2004
EU-Med: European Mediterranean Countries
Eurostat: Statistical office of the European Union, Luxembourg
FAO: Foo d and Agriculture Organisation of the United Nations
FAOSTAT: Statistics Division of FAO, the Food and Agriculture Organisation of the United Nations
FiBL: Forschungsinstitut für biologischen Landbau – Research Institute of Organic Agriculture, Switzerland
GATS: USDA's Global Agriculture Trade System, United States of America
Ha: Hectares
Horizon 2020: Research and Innovation programme of the European Union, running from 2014 to 2020
Hivos: Dutch Humanist Institute for Cooperation
HS codes: Harmonized System Codes (HS Code)
IAMB: L'Istituto Agronomico Mediterraneo di Bari – Mediterranean Agronomic Institute Bari, Italy
IFAD: International Fund for Agricultural Development
IFOAM – Organics International: International Federation of Organic Agriculture Movements, Germany
IFOAM EU Group: European Union Group of the International Federation of Organic Agriculture Movements
IISD: International Institute of Sustainable Development, Canada
ISOFAR: International Society of Organic Agriculture Research, Germany
ITC: International Trade Centre, Switzerland
MAEP: Ministry of Agriculture and Environmental Protection, Serbia
Mio.: Million
MOAN: Mediterranean Organic Agriculture Network, Italy
NASAA: National Association for Sustainable Agriculture, Australia
NASS: USDA's National Agricultural Statistics Services, United States of America
OrganicDataNetwork: Data network for better European organic market information
OrMaCode: ORganic market data MAnual and CODE of Practice - Manual and Code of Practice for the initiation and maintenance of good organic market data collection and publication procedures
OTA: Organic Trade Association, United States of America
OWC: Organic World Congress of the International Federation of Organic Agriculture Movements
PGS: Participatory Guarantee Systems
POETcom: Pacific Organic and Ethical Trade Community
SECO: State Secretariat for Economic Affairs, Switzerland
SEM: Southern and Eastern Mediterranean Countries
SPC: Secretariat of the Pacific Community
SÖL: Stiftung Ökologie & Landbau – Foundation Ecology & Agriculture, Germany
SSI: State of Sustainability Initiatives, Canada
TIPI: Technology Innovation Platform of the International Federation of Organic Agriculture Movements
TP Organics: European Technology Platform for Organic Food and Farming
USDA: United States Department of Agriculture
VCO: Virgin Coconut Oil
VSS: Voluntary Sustainability Standards

Foreword from SECO and ITC

This book provides a clear statement on the resilience of the organic trend. On the consumer side, organic products with a total value of almost 72 billion US dollars were sold globally in 2013. A growth rate of more than 10 percent was recorded in the most advanced markets for organic products. The market in the United States grew by more than 11 percent in 2013, and in Switzerland that same year, where the market has been evolving over several years with high growth rates, it grew by 12 percent. The production side is also keeping pace: The latest data for 2013 show that organic farmland has grown in many countries and the total organic area increased to 43 million hectares. In particular, for some tropical crops such as cocoa, area growth rates of more than 10 percent were reached in 2013. Six "new" countries have joined the community of organic producers, so there are now 170.

One challenge is the total world volume of organic production compared to the overwhelming majority of "conventional" production. For cocoa, the organic area represents only about 2.3 percent, and for banana, less than one percent of the total world area for these crops.

On the other hand, the importance of sustainability standards is increasing, and organic is increasingly in competition with other sustainability labels. However, data on the performance of these Voluntary Sustainability Standards (VSS) are still scarce and, therefore, collecting timely and accurate market data to facilitate policy and investment decisions is important for policy makers, market actors, and donors. The Research Institute of Organic Agriculture (FiBL), IISD's[1] State of Sustainability Initiatives (SSI), and the International Trade Centre (ITC) are partnering with the support of SECO in joint data collection efforts to ensure continuous, accurate, and relevant reporting. This group has already developed a list of indicators and is currently collecting data on several crops from several VSS. We hope to publish the first set of VSS data in next year's report.

It is essential for the organic community to gather relevant information on market trends in order to continue attracting the various stakeholders. Transparent information enables credibility and informed decisions on the costs and benefits of organic production for both the producer and the buyer. This book makes a major contribution to such transparency.

Considering the latest figures and the continuous and sustainable growth over many years, the organic movement can look confidently into the future.

Thierry Buchs
Head of the Division for Trade Promotion
Swiss State Secretariat for Economic Affairs (SECO)
Bern, Switzerland

Joseph Wozniak
Manager of the Trade for Sustainable Development (T4SD) Programme
International Trade Centre (ITC)
Geneva, Switzerland

[1] IISD is the International Institute of Sustainable Development, www.iisd.org

Foreword from FiBL and IFOAM – Organics International

Data collection is a major and constant concern of the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM – Organics International). The comprehensive data provided in this publication serve as an important tool for stakeholders, policy makers, authorities, and the industry, as well as for researchers and extension professionals. The information provided here has proven useful in development programs and supporting strategies for organic agriculture and markets, and crucial for monitoring the impact of these activities. The data collection of FiBL and IFOAM – Organics International has become one of the most frequently quoted literature in scientific, technical and descriptive papers and reports on organic agriculture.

With this edition, FiBL and IFOAM – Organics International are presenting "The World of Organic Agriculture" for the 16th time. The data and information compiled in this volume document the current statistics, recent developments, and trends in global organic farming. The statistical information and all chapters have been updated. As in previous editions, regional reports were also compiled.

We would like to express our thanks to all authors and data providers for contributing in-depth information and figures on their region, their country or their field of expertise.

We are grateful to Swiss State Secretariat for Economic Affairs (SECO)/Economic Development and Cooperation and the International Trade Centre (ITC) for their support.

Furthermore, we are happy to count on the continuous support of NürnbergMesse, the organizers of the BIOFACH, the World's leading trade fair for organic food.

Frick and Bonn, February 2015

Prof. Dr. Urs Niggli
Director
Research Institute of
Organic Agriculture FiBL
Frick, Switzerland

Markus Arbenz
Executive Director
IFOAM – Organics International
Bonn, Germany

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Agriculture (DOA), Vientiane, Lao PDR; **Lorcan Bourke,** Bord Bia - Irish Food Board, Dublin 2, Ireland; **Trevor Brown,** Jamaica Organic Agriculture Movement JOAM, Kingston 6, Jamaica, West Indies; **Marie Reine Bteich,** Centro Internazionale di Alti Studi Agronomici Mediterranei - Istituto Agronomico Mediterraneo di Bari - CIHEAM-IAM Bari, Bari, Italy; **Lakshmi Budaraju,** BioGro New Zealand, Wellington, New Zealand; **Klaus Büchel,** Klaus Büchel Anstalt, Mauren, Liechtenstein; **Andreas Bürkert,** University of Kassel, Faculty of Organic Agricultural Sciences, Witzenhausen, Germany; **Diana Callear,** Afrisco, Pretoria, South Africa; **Carmen I. Calverley,** NaturErhvervstyrelsen, Center for Jordbrug, Økologi, Koebenhavn V, Denmark; **Johan Cejie,** KRAV Incorporated Association, Uppsala, Sweden; **Jennifer Chang,** Korean Federation of Sustainable Agriculture Organizations (KFSA), Seoul, Republic of Korea; **Allal Chibane,** Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco; **Stanley Chidaya,** Malawi Organic Growers Association (MOGA), Lilongwe, Malawi; **Thomas Cierpka,** IFOAM - International Federation of Organic Agriculture Movements, Bonn, Germany; **Marian Cioceanu,** Bio Romania, Bucureşti, Romania; **Cathy Cogo,** Australian Organic, Nundah, Australia; **Dominikus Collenberg,** Organic Africa, Pomona-Borrowdale, Harare, Zimbabwe; **Marcus Coomer,** BioGro New Zealand, Wellington, New Zealand; **Genaro Coronel,** Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas SENAVE, Asunción, Paraguay; **Martin Cottingham,** UK; **Catarina Crisostomo,**, Portugal; **Philip Cullen,** Department of Agriculture, Food and Rural Development, The Organic Farming Unit, Johnstown, Ireland; **Nune Darbinyan,** ECOGLOBE - Organic control and certification body, Yerevan, Republic of Armenia; **Famara Diédhiou,** Fédération Nationale pour l'Agriculture Biologique, Thiès, Senegal; **Dóra Drexler,** Hungarian Research Institute of Organic Agriculture (ÖMKi), Budapest, Hungary; **Pilar M. Eguillor Recabarren,** Oficina de Estudios y Politicas Agrarias ODEPA, Santiago Centro, Chile; **Tobias Eisenring,** Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Göran Ekbladh,** Jordbruksverket, Jönköping, Sweden; **Lucy Ellis,** Department of Agriculture, Stanley, Falkland Islands (Malvinas); **Sandra Elvir Sanchez,** SENASA HONDURAS, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras; **Carlos Escobar,** ECONEXOS, Conexion Ecologica, Cali, Colombia, Cali, Colombia; **Richard Escobar,** Ecocert, Bogota, Colombia; **Angela Pernas Escosteguy,** Instituto do Bem-Estar, Porto Alegre, Brazil; **Monique Faber,** Administration des services techniques de l'agriculture (ASTA), Luxembourg; **Addisu Alemayehu Ferede,** Ethiopian Institute of Agricultural Research EIAR, Akaki, Ethiopia; **Tobias Fischer,** BCS Öko-Garantie GmbH, Nürnberg, Germany; **Barbara Fitch Haumann,** Organic Trade Association (OTA), Brattleboro, United States of America; **Patricia Flores Escudero,** Latin American Office of the International Federation of Organic Agriculture Movements (IFOAM), Lima, Peru; **Emmeline Foubert,** Certisys, Walhain, Belgium; **Udo Funke,** BioFach - World Organic Trade Fair, Nürnberg, Germany; **Jordan Gama,** AfrONet, Dar es Salaam, Tanzania; **Salvador Garibay,** Forschungsinstitut für biologischen Landbau (FiBL) / Research Institute of Organic Agriculture, Frick, Switzerland; **Catherine Gerrard,** Organic Research Centre, Hamstead Marshall, Newbury, UK; **Maheswar Ghimire,** Kathmandu, Nepal; **Laurent C. Glin,** FiBL Regional Office for West Africa, Benin; **Denise Godinho,** IFOAM - International Federation of Organic Agriculture Movements, Bonn, Germany; **Victor**

Gonzálvez Pérez, Sociedad Española de Agricultura Ecologica (SEAE) / Spanish Society for Organic Agriculture, Catarroja, Spain; **Daniel Gorba,** Forschungsinstitut für biologischen Landbau (FiBL), Frick, Switzerland; **David Gould,** International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **P.V.S.M. Gouri,** Agricultural and Processed Food Products. Export Development Authority, August Kranti Marg. New Delhi, India; **Catherine Greene,** Economic Research Service USDA, Washington DC, United States; **Simone Groh,** CERES - CERtification of Environmental Standards - GmbH, Happurg, Germany; **Iulia Grosulescu,** Ministry of Agriculture and Rural Development, Bucharest; **Rannveig Guðleifsdóttir,** Vottunarstofan Tún ehf., Reykjavik, Iceland; **Gunnar Gunnarsson,** Vottunarstofan Tún ehf., Reykjavik, Iceland; **Roberto Guimarães Habib Mattar,** Ministério da Agricultura Pecuária e Abastecimento – MAPA, Brasília DF, Brazil; **Marco Hartmann,** Organic Farming Project, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, GIZ International Services, Riyadh, Saudi Arabia; **Abid Ali Hasan,** Zakho Small Villages Projects, Dohuk, Iraq; **Sampsa Heinonen,** Evira, Helsinki, Finland; **Loni Hensler,** Institute of Market Ecology IMO, Weinfelden, Switzerland; **Otto Hofer,** Lebensministerium, Wien, Austria; **Matthew Holmes,** Canada Organic Trade Association, Ottawa, Canada; **Andrea Hrabalová,** Institute of Agricultural Economics and Information (UZEI), Brno, Czech Republic; **Beate Huber,** Forschungsinstitut für biologischen Landbau (FiBL) / Research Institute of Organic Agriculture, Frick, Switzerland; **Basri Hyseni,** Initiative for agricultural development of Kosovo (IADK, Mitrovica, Republic of Kosovo; **Nizami Ibrahimli,** Ganja Agribusiness Association (GABA), Ganja City, Azerbaijan; **Bernd Jansen,** EkoConnect - International Centre for Organic Agriculture of Central and Eastern Europe e.V., Dresden, Germany; **Jorge Leonardo Jave Nakayo,** Ministerio de Agricultura - SENASA- Perú, Lima, Peru; **Aikuali Joseph,** Dominica Organic Agriculture Movement (DOAM), Roseau, Dominica; **Ágnes Juhász,** National Food Chain Safety Office nébih, Budapest, Hungary; **Jack Juma,** Kenya Organic Agricultural Network (KOAN), Nairobi, Kenya; **Man Chul Jung,** Korean Federation of Sustainable Agriculture Organizations (KFSA), Seoul, Republic of Korea; **Edith Kalka,** Namibian Organic Association NOA, Okahandja, Namibia; **Clara Larsson,** Statistics Sweden, Economic Statistics Department, Örebro, Sweden; **Lani Katimbang-Limpin,** Organic Certification Center of the Philippines OCCP, Barangay Laging Handa, Quezon City, Philippines; **Iris Kazazi,** Albanian Association of Marketing, Tirana, Albania; **Andrey Khodus,** Eco-control Ltd., Solnechnogorsk, Russian Federation; **Corinne Khoury,** IMCERT Lebanon, Beirut, Lebanon; **Eustace Kiarii,** Kenya Organic Agricultural Network (KOAN), Nairobi, Kenya; **Nadine Kieffer,** Administration des services techniques de l'agriculture (ASTA), Luxembourg; **Cornelia Kirchner,** International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Bernisa Klepo,** Organska Kontrola (OK), Sarajevo, Bosnia & Herzegovina; **Evgeniy Klimov,** Organic Centre of Kazakhstan, Almaty, Kazakhstan; **Marja-Riitta Kottila,** Pro Luomu, Kauniainen, Finland; **Kai Kreuzer,** Organic-Market.Info, Lauterbach, Germany; **Heinz Kuhlmann,** ABC Enterprises, Tokio, Japan; **Manoj Kumar Menon,** International Competence Centre for Organic Agriculture ICCOA, Rajarajeshwarinagar, Bangalore, India; **Shaknoza Kurbanalieva,** HELVETAS Swiss Association for International Cooperation, Jalal-Abad, the Kyrgyz Republic; **Noel Kwai,**

Tanzania Organic Agriculture Movement TOAM, Dar es Salaam, Tanzania; **Marie-Eve Levert,** Canada Organic Trade Association, Ottawa, Canada; **Ralph Liebing,** ORA ~ Organic Retailers Association, Wien, Austria; **Ming Chao Liu,** Organics Brazil, Brazil; **Alexander Lysenkov,** ABCert GmbH, Esslingen, Germany; **Samia Maamer Belkhiria,** Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche, Tunis, Tunisia; **Anne Macey,** Canadian Organic Growers COG, Canada; **Marcela Machuca Henao,** Ecocert, Bogota D.C, Colombia; **Mazen Al Madani,** Ministry of Agriculture and Agrarian Reform, Syria; **Hossein Mahmoudi,** Environmental Sciences Research Institute, Evin Shahid Beheshti University SBU, Velenjak, Evin, Tehran, Iran; **Sohil Makhol,** Syria; Ula Makkawi, Federal Ministry of Agriculture & Irrigation, Organic Agriculture focal point, Sudan; **Fernando Maldonado,** Dirección General de Sanidad Vegetal y Animal, El Salvador; **Christiane Mannigel**, Germany; **Karen Mapusua,** Secretariat of the Pacific Community (SPC), Suva, Fiji; **Robert Mayo,** Food and Agriculture Organization of the United Nations (FAO), Roma, Italy; **Cliflyn McKenzie,** Ecocert Southern Africa, Gardens, Cape Town, South Africa; **Stephen Meredith,** IFOAM EU Group, Brussels, Belgium; **Merit Mikk,** Centre of Ecological Engineering - Ökoloogiliste Tehnoloogiate Keskus, Tartu, Estonia; **Jelena Milic,** Ministry of Agriculture, Forestry and Water, Belgrade, Republic of Serbia; **Eugene Milovanov,** Organic Federation of Ukraine, Kyiv; **Natasa Mirecki,** University of Montenegro, Biotechnical Faculty, Podgorica, Montenegro; **Andrew Monk,** Australian Organic, Nundah, Australia; **Mersida Musabegovic,** Organska Kontrola (OK), Sarajevo, Bosnia & Herzegovina; Chariton D.B.Namuwoza**,** National Organic Agricultural Movement of Uganda NOGAMU, Kampala, Uganda; **Từ Thị Tuyết Nhung,** Vietnam Organic Agriculture Association, Hanoi, Vietnam; **Urs Niggli,** Research Institute of Organic Agriculture, Frick, Switzerland; **Aleksandra Nikolic,** University of Sarajevo, Sarajevo, Bosnia and Herzegovina; **Tomas Fibiger Nørfelt,** Knowledge Centre for Agriculture VLF, Århus, Denmark; **Agung Nugroho,** Helvetas Laos, Vientiane Capital, Lao PDR; **Kung Wai Ong,** Humus Consultancy, Penang, Malaysia; **Maximiliano Ortega,** Belize Organic Producers Association, Belmopan, Belize; **Kristina Ottosson,** Jordbruksverket, Jönköping, Sweden; **Susanne Padel,** Organic Research Centre, Hamstead Marshall, Newbury, UK; **Eli Pandeva,** Bioselena: Foundation for organic agriculture, Karlovo, Bulgaria; **Vitoon Panyakul,** Green Net, Bangkok, Thailand; **Ejvind Pedersen,** Landbrug & Fødevarer, Copenhagen, Denmark; **Elias Pfäffli,** bio.inspecta, Frick, Switzerland; **Joan Picazos,** Biocop Productos Biológicos, S.A. (BIOCOP), Lliçà de vall (Barcelona), Spain; **Diego Pinasco,** Servicio Nacional de Sanidad y Calidad Agroalimentaria SENASA, Buenos Aires, Argentina; **Roberto Pinton,** Pinton Organic Consulting, Padova, Italy; **Natalie Prokopchuk,** Swiss-Ukrainian project "Organic Certification and Market Development in Ukraine", Kyiv, Ukraine; **Patrizia Pugliese,** Centro Internazionale di Alti Studi Agronomici Mediterranei - Istituto Agronomico Mediterraneo di Bari - CIHEAM- IAM Bari, Valenzano, Italy; **Yuhui Qiao,** China Agricultural University, Beijing, China; **Juan Carlos Ramirez,** Servicio Nacional de Sanidad y Calidad Agroalimentaria SENASA, Buenos Aires, Argentina; **Wenndy Ramirez,** Ecocert Colombia, Bogota D.C., Colombia; **Basanta Rana Bhat,** Ecological Service Centre, Chitwan, Nepal; **Sandra Randrianarisoa,** Ecocert East Africa, Antananarivo, Madagascar; **Michel Reynaud,** Ecocert International, Office, L'Isle

Jourdain, France; **Nathalie Rison Alabert,** Agence BIO, Montreuil-sous-Bois, France; **Ole Rognstad,** Statistics Norway, Division for Primary Industry Statistics, Oslo, Norway; **Marta Romeo,** Sistema d'Informazione nazionale sull'agricoltura biologica SINAB, Roma, Italy; **Fermín Romero,** Ministerio de Desarrollo Agropecuario, Panama; **Felix Ruhland,** Organic Farming Project, GIZ International Services, Riyadh, Saudi Arabia; **Amarjit Sahota,** Organic Monitor Ltd., London, UK; **Abdus Salam**, Bangaldesh; **Abdalla Mohamed Salih,** Organic Farming Project, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, GIZ International Services, Riyadh, Saudi Arabia**; Vincent Samborski,** Landbouw en Visserij, Brussels, Belgium; **Gregory Sampson,** International Trade Centre (ITC), Geneva, Switzerland; **Thatsaka Saphangthong**, Vientiane, Lao PDR; **Diana Schaack,** Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany; **Aender Schanck,** BIOGROS Logistique, Munsbach, Luxembourg; **Winfried Scheewe,** Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, Sangkat Boeung Keng Kang III, Khan Chamkar Mon, Phnom Penh, Cambodia; **Bernhard Schlatter,** Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; **Otto Schmid,** Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Rita Schwentesius,** Universidad Autónoma Chapingo // Chapingo University, Chapingo, México; **Hana Šejnohová,** Institute of agricultural economics and information, Brno, Czech Republic; **Iurie Senic,** Ministry of Agriculture and Food Industry of the Republic of Moldova, Chisinau, Moldova; **Elene Shatberashvili,** Elkana - Biological Farming Association, Akhaltsikhe, Georgia; **Virgilijus Skulskis,** Lithuanian Institute of Agrarian Economics, Vilniusa, Lithuania; **Anamarija Slabe,** Institut za trajnostni razvoj, Lubljana, Slovenia; **Nicolette van der Smissen,** Consultant for Organic Production, Feres, Greece; **Manjo Smith,** Namibian Organic Association NOA, Okahandja, Namibia; **Francesco Solfanelli,** Università Politecnica Marche, Ancona, Italy; **Sokol Stafa,** Albinspekt, Tiranë, Shqipëri, Albania; **Erdal Süngü,** Ministry of Food Agriculture and Animal Husbandry, Ankara, Türkei; **Trine Thanh Ha,** Norwegian Agricultural Authority SLF, Oslo, Norway; **Ginna Paola Torres,** Ecocert Colombia, Bogota, Colombia; **Emma Tsessue,** ECOCERT SAS, L'Isle Jourdain, France; **Kesang Tshomo,** Ministry of Agriculture MOA, Thimphu Bhutan; **Daniela Vairo,** Università Politecnica delle Marche, Ancona, Italy; **Paul Verbeke,** BioForum Vlaanderen vzw, Antwerpen, Belgium; **Fabienne Verzeletti,** LACON GmbH, Offenburg; **Hellmut von Koerber,** fleXinfo, Frick, Switzerland; **Maohua Wang,** Certification and Accreditation Administration of the People's Republic of China CNCA, Haidian district, Beijing, China; **Yu Watanabe,** IFOAM JAPAN, Tokyo; **Sam Welsch,** OneCert, Inc., Lincoln, New Zealnd; **Meike Wollenberg Martinez,** Bio.Inspecta, Frick, Switzerland; **Joseph Wozniak,** International Trade Centre (ITC), Geneva, Switzerland; **Els Wynen,** Eco Landuse Systems, Flynn, Australia; **Abdoul Aziz Yanogo,** Ecocert SA West Africa Office, Ougadougou 11, Burkina Faso; **Weimin Yu,** Ecocert China, Beijing, China; **Tshering Zam,** Ministry of Agriculture and Forests, Department of Agriculture, National Organic Program, Bhutan; **Raffaele Zanoli,** Università Politecnica delle Marche, Ancona; **José Zapata,** Oficina de Control Agricultura Organica, Santo Domingo, Republica Dominicana; **Livija Zarina,** State Priekuli Plant Breeding Institute SPPBI, Priekuli, Latvia; **Zhejiang Zhou,** IFOAM Asia, China; **Darko Znaor,** Independent Consultant, Zagreb, Croatia.

Organic Agriculture 2015: Key Indicators and Leading Countries

Indicator	World	Leading countries
Countries with data on certified organic agriculture[1]	2013: 170 countries	
Organic agricultural land	2013: 43.1 million hectares (1999: 11 million hectares)	Australia (17.2 million hectares) Argentina (3.2 million hectares) US (2.2 million. hectares, 2011)
Share of total agricultural land	2013: 0.98 %[2]	Falkland Islands (Malvinas) (36.3 %) Liechtenstein (31 %) Austria (19.5 %)
Further, non-agricultural organic areas (mainly wild collection)	2013: 35.1 million hectares (2012: 30.4 million hectares; 2010: 31.7 million hectares)	Finland (9 million hectares) Zambia (6.1 million hectares; 2009) India (5.2 million hectares)
Producers	2013: 2 million producers (2012: 1.9 million producers; 2011: 1.8 million producers)	India (650'000), Uganda (189'610; 2012), Mexico (169'703)
Organic market size	2013: 72 billion US dollars (1999: 15.2 billion US dollars) Source: Organic Monitor	US (24.3 billion euros), Germany (7.6 billion euros) France (4.4 billion euros)
Per capita consumption	2013: 10.05 US dollars[3]	Switzerland (210 euros), Denmark (163 euros) Luxemburg (157 euros)
Number of countries with organic regulations	2013: 82 countries	
Number of IFOAM affiliates	2014: 815 affiliates from 120 countries	Germany - 89 affiliates; China - 55 affiliates; USA - 51 affiliates; India - 47 affiliates

Source: FiBL and IFOAM; for total global market: Organic Monitor

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[1] Where the designation "country" appears in this book, it covers countries or areas see UNSTAT website http://unstats.un.org/unsd/methods/m49/m49regin.htm.

[2] Share of the countries included in the FiBL-IFOAM survey 2015.

[3] Total world population 7.16 billion in 2013 according to FAOSTAT, FAO, Rome; http://faostat.fao.org/site/550/DesktopDefault.aspx?PageID=550#ancor.

The World of Organic Agriculture 2015: Summary

Helga Willer[1] and Julia Lernoud[2]

Key data on organic agriculture

According to the latest FiBL-IFOAM survey on certified organic agriculture worldwide, as of the end of 2013, data on organic agriculture is available from 170 countries (up from 164 in 2012).

There were 43.1 million hectares of organic agricultural land in 2013, including in-conversion areas. The regions with the largest areas of organic agricultural land are Oceania (17.3 million hectares, 40 percent of the world's organic agricultural land) and Europe (11.5 million hectares, 27 percent). Latin America has 6.6 million hectares (15 percent) followed by Asia (3.4 million hectares, 8 percent), North America (3 million hectares, 7 percent) and Africa (1.2 million hectares, 3 percent). For the detailed results of the FiBL-IFOAM survey, see page 32. The countries with the most organic agricultural land are Australia (17.2 million hectares), Argentina (3.2 million hectares), and the United States (2.2 million hectares).

Currently, one percent of the agricultural land of the countries covered by the survey is organic. By region, the highest shares of the total agricultural land are in Oceania (4.1 percent) and in Europe (2.4 percent). In the European Union, 5.7 percent of the farmland is organic. However, some countries reach far higher shares: Falkland Islands, 36.3 percent; Liechtenstein, 31 percent; Austria, 19.5 percent. In eleven countries, more than ten percent of the agricultural land is organic.

For 2013, almost 6 million hectares of organic agricultural land more were reported than for 2012. This is mainly due to the fact that five million hectares more were reported from Australia, due to rangeland areas coming into organic production. There has been an increase of the organic agricultural land in all regions, with the exception of Latin America; in Europe, the area grew by 0.3 million hectares (+3 percent). In Africa, the area grew by almost 7 percent (almost 80'000 hectares); in Asia, the area grew by more than 0.2 million hectares (+6.5 percent) and in North America by 1 percent. Only in Latin America did the organic land decrease, mainly due to a decrease of organic grazing areas in Argentina. Apart from Australia, a major increase of organic agricultural land was noted for China, Peru, Italy, and Ukraine.

Apart from agricultural land, there are further organic areas, most of these being areas for wild collection. Other areas include aquaculture, forests, and grazing areas on non-agricultural land. The areas of non-agricultural land constitute more than 35 million hectares. In total, 78 million hectares (agricultural and non-agricultural areas) are organic.

There were almost 2 million producers in 2013.[3] Thirty-six percent of the world's organic producers are in Asia, followed by Africa (29 percent) and Europe (17 percent).

[1] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Please note that some countries report only the numbers of companies, projects, or grower groups, which may each comprise a number of individual producers. The number of producers should, therefore, be treated

The countries with the most producers are India (650'000), Uganda (189'610), and Mexico (169'703).

About a quarter of the world's agricultural land (11.7 million hectares) and more than 80 percent (1.7 million) of the producers are in developing countries and emerging markets.

Land use details were available for almost 90 percent of the organic agricultural land. Unfortunately, some countries with very large organic areas, such as Australia, Brazil, and India had little or no information on their land use. Almost two-thirds of the agricultural land was grassland/grazing areas (27 million hectares). With a total of at least 7.7 million hectares, arable land constitutes almost 20 percent of the organic agricultural land. An increase of almost three percent over 2012 was reported. Most of this category of land is used for cereals including rice (3.3 million hectares), followed by green fodder from arable land (2.4 million hectares), oilseeds (0.8 million hectares), vegetables (0.3 million hectares), and protein crops (0.3 million hectares). Permanent crops account for seven percent of the organic agricultural land, amounting to 3.2 million hectares. The most important permanent crops are coffee (with more than 0.7 million hectares, constituting almost one quarter of the organic permanent cropland), followed by olives (0.6 million hectares), nuts and grapes (0.3 million hectares each), and cocoa (0.2 million hectares).

Global market

Global sales of organic food and drink reached 72 billion US dollars[1] in 2013.[2] Revenues have increased almost five-fold since 1999. Organic product sales have increased at a healthy rate over the last decade, and Organic Monitor predicts growth will continue in the coming years. Europe and North America generate over 90 percent of global sales. Although Asia, Australasia, Latin America, and Africa have become important producers of organic agricultural crops, their markets for organic products remain small. (See chapter by Amarjit Sahota, page 120).

In 2013, the countries with the largest organic markets were the United States (24.3 billion euros), Germany (7.6 billion euros), and France (4.4 billion euros). The largest single market was the United States (approximately 43 percent of the global market), followed by the European Union (22.2 billion euros, 40 percent) and China (2.4 billion euros), for which, for the first time, data on the domestic market was released. The highest per-capita consumption with more than 100 euros was in Switzerland, Denmark, and Luxembourg. The highest market shares were reached in Denmark (8 percent), Switzerland (6.9 percent) and Austria (6.5 percent). (See chapter on the global survey on organic agriculture, section on global market, page 62).

Africa

There are slightly more than 1.2 million hectares of certified organic agricultural land in Africa, which constitutes about three percent of the world's organic agricultural land.

with caution, and it may be assumed that the total number of organic producers is higher than that reported here.

[1] 1 Euro was 1.3281 US dollars in 2013 according to the Central European Bank.

[2] Global market size is slightly higher than previous years because of fluctuations in exchange rate (EUR: USD) and revisions of market data.

There are more than 574'000 producers. Uganda is the country with the largest organic area (with more than 231'000 hectares) and with the largest number of organic producers. The country with the highest share of organic agricultural land is the island state Sao Tome and Principe, with 7.2 percent of its agricultural area being organic. The majority of certified organic produce in Africa is destined for export markets. Key crops are coffee, olives, nuts, cocoa, oilseeds, and cotton. There is a growing recognition among policy makers that organic agriculture has a significant role to play in addressing food insecurity, land degradation, poverty, and climate change in Africa. The International Federation of Organic Agriculture Movements (IFOAM) is currently working with the African organic sector, the African Union, and other agencies in the framework of its "Organic Alternative for Africa Initiative" to facilitate the integration of organic agriculture into the core of African policies and the agricultural development agenda. Significant breakthroughs were achieved in 2013 in the institutionalization of the African Organic Network (AfrONet). Its activities include strengthening and supporting regional networks, the Ecological Organic Agriculture Initiative for Africa, and organic conferences in Eastern, Western, Central and Southern Africa (see the article by Jordan Gama, page 142).

Asia

The total organic agricultural area in Asia was 3.4 million hectares in 2013. This constitutes 8 percent of the world's organic agricultural land. There were nearly 0.7 million producers; most of these were in India. The leading countries by area were China (2.1 million hectares) and India (0.5 million hectares); Timor-Leste has the highest proportion of organic agricultural land (almost 7 percent). Consumer demand for organic foods is growing in Asia, partly due to consumer concerns about food safety, and this has been a major driver of organic food sales in China. Ong Kung Wai writes that 2014 was a good year for organic (page 154). Community Supported Agriculture (CSA) and Participatory Guarantee Systems (PGS) are developing apace as low-cost alternatives to 3rd party certification. The ASEAN Standard for Organic Agriculture (ASOA) was formally adopted in late 2014.[1]

On page 163, Qing He et al. report about organic vegetable production in China, where, due to the growing market, development prospects for organic vegetables are very good, but the support of technology and policy is needed.

Europe

As of the end of 2013, 11.5 million hectares of agricultural land in Europe (European Union 10.2 million hectares) were managed organically by more than 330'000 producers (European Union almost 260'000). In Europe, 2.4 percent of the agricultural area is organic (European Union: 5.7 percent). Twenty-seven percent of the world's organic land is in Europe. Organic farmland has increased by approximately 0.3 million hectares since 2012. The countries with the largest organic agricultural area are Spain (1.6 million hectares), Italy (1.3 million hectares), and France and Germany (both 1.1 million hectares). Eight countries have more than 10 percent organic agricultural land: Liechtenstein has the lead (31 percent), followed by Austria (19.5 percent) and Sweden

[1] The standard can now be viewed and downloaded from the ASEAN website: http://www.asean.org/communities/asean-economic-community/category/other-documents-6

(16.3 percent). Sales of organic products totalled approximately 24.3 billion euros in 2013 (European Union: 22.2 billion euros), an increase of six percent over 2012. The largest market for organic products in 2013 was Germany, with retail sales of 7.6 billion euros, followed by France (4.4 billion euros) and the UK (2.1 billion euros) (see the article by Willer and Schaack et al., page 181).

As a key development of the year, the European Commission published a proposal for new organic food and farming legislation and approved a new EU organic action plan in 2014. The European Technology Platform for Organic Food and Farming Research (TP Organics) published priority topics for the Horizon 2020 Work Programme 2016/2017, the current research framework programme of the European Union. (See article by Willer and Meredith, page 178).

Latin America

In Latin America, slightly more than 300'000 producers managed 6.6 million hectares of agricultural land organically in 2013. This constitutes 15 percent of the world's organic land and 1.1 percent of the region's agricultural land. The leading countries are Argentina (3.2 million hectares), Uruguay (0.9 million hectares, 2006) and Brazil (0.7 million hectares). The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (36.3 percent), French Guiana (11.9 percent), and the Dominican Republic (9.3 percent). Notable growth occurred in Peru, where the organic area increased by almost 200'000 hectares.

Domestic markets are trending positively in the region. Today, the public is more environmentally aware and has greater purchasing power than in the past, and there are more producers supplying organic food in alternative commercial schemes, such as fairs, home deliveries, and small food stores. Domestic markets with Participatory Guarantee Systems (PGS) and third-party certification are gaining more recognition among consumers. The United States maintains a database that allows tracking imports of selected organic commodities, and the statistics emphasize the importance of Latin American and Caribbean countries as suppliers for the United States organic food market, especially of products like coffee, seasonal fruits, and vegetables. The organic sector and the legal framework scenario have kept stable during the past three years. Some governments, such as those of Mexico, Chile, Argentina, and Brazil, have provided significant support to the organic sector. This is reflected in the allocation of resources and capacity-building programs. For details, see the article on Latin America with country reports by Patricia Flores, page 226.

North America

In North America, more than 3 million hectares of farmland were managed organically in 2013. Of these, 2.2 million were in the United States (2011 data) and 0.9 million in Canada, representing approximately 0.7 percent of the total agricultural area in the region and 7 percent of the world's organic agricultural land.

U.S. consumer sales of organic products topped 35 billion US dollars in 2013 (up to 11.5 percent overall from 2012), and were forecast to have grown more than 11 percent overall in 2014, with predictions for continued growth over 11 percent during 2015. According to preliminary findings, U.S. organic product exports reached a new high of 537 million US dollars in 2013, up more than 20 percent from the previous year. Apples,

lettuce and grapes were the top three U.S. organic exports. Organic product imports tracked in 2013 added up to nearly 1.3 billion US dollars. Coffee, wine, soybeans and olive oil were the top organic imports. On July 1, 2014, the United States and the Republic of Korea welcomed a new equivalency arrangement that reopened an important Asian market for U.S. organic processed food products and was seen as an opportunity for job creation and opportunities for the American organic food and farming sector. The final 2014 Farm Bill incorporated provisions for all of the policy "asks" from the organic sector, such as increased funding for the National Organic Program. This is an important development, as historically, organic agriculture has been under-represented in U.S. Farm Bill programs compared to conventional agriculture. See the article by Haumann, page 240.

In Canada, the total area in certified production is estimated at approximately 870'000 hectares. Organics in Canada continue to enjoy robust demand, with conservative estimates for 2013 putting the domestic consumer market for organic food and beverages at 3.25 billion Canadian dollars,[1] representing 2.8 percent of all sales. Exports are valued at over 500 million Canadian dollars, and are greatly facilitated by Canada's five equivalency arrangements with major trading partners; the latest was in September 2014, when Canada and Japan announced an arrangement. Currently, the Canadian organic standards, including materials lists, are undergoing a comprehensive five-year review. In late 2015, a fully revised organic standard and permitted substances list will be published. In August 2014, the Government of Canada announced an investment of eight million Canadian dollars for the continuation of the Organic Science Cluster, an industry-supported research and development endeavour initiated by the Organic Agriculture Centre of Canada, in collaboration with the Organic Federation of Canada with the support of Agriculture and Agri-Food Canada's *Growing Forward 2* program. For more details on recent developments in Canada, see the article by Matthew Holmes and Marie-Eve Levert (page 245).

Oceania

This region includes Australia, New Zealand, and the Pacific Island states. Altogether, there are almost 23'000 producers, managing 17.3 million hectares. This constitutes 4.1 percent of the agricultural land in the region and 40 percent of the world's organic land. In 2013, 5.2 million hectares more, or 42 percent, were reported compared with 2012. 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). More than 98 percent of the organic land in the region is in Australia (17.2 million hectares, 97 percent of which is extensive grazing land), followed by New Zealand (106'000 hectares), and Samoa (33'500 hectares). The highest shares of all agricultural land are in Samoa (11.8 percent), followed by French Polynesia (5.5 percent), Australia (4.2 percent), and Vanuatu (2.2 percent). Growth in the organic industry in Australia, New Zealand, and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic sales are, however, also growing. In

[1] In 2013, 1 Canadian Dollar corresponded to 0.731 euros.

Australia, the domestic market was valued at 1.3 billion Australian dollars in 2014[1] and in New Zealand at 130 million New Zealand dollars (2012).[2]

As outlined in the recent Australian Organic Market Report, the strong area growth has been in the rangeland areas reflecting an increase in certified organic beef production. Meanwhile, the strong demand for certified organic beef continues, and organic beef sales have increased substantially since 2012. The availability of organic products in major supermarkets and new, independent organic retailers is, in part, responsible for the domestic market growth; however, a strong export market is supporting existing farmers and producers, as well as encouraging new entrants into the organic arena (Australian Organic, page 254).

Most of the organically certified products from the Pacific Islands are for export. Key products include spices, coconut products, and tropical fruit. The main international markets are Australia and New Zealand, due to their proximity. Japan is a growing market, and other markets include North America and the European Union. Generally, domestic markets for organic certified products are not very developed and, in some cases, are non-existent. The years 2013 and 2014 saw a significant increase in interest in Participatory Guarantee Systems (PGS) in the Pacific Islands as market opportunities for PGS certified products evolved, and examples were generated of how organic and PGS can be tools for holistic and sustainable social and economic development (see chapter by Karen Mapusua, page 259).

Standards and regulations

According to the FiBL survey on organic rules and regulations, there are 82 countries with an organic regulation. Sixteen countries are in the process of drafting legislation. The dominating topic in 2014 in the European Union was the European Commission's proposal for a new organic regulation. The draft, published by the European Commission in March 2014, caused a strong reaction from the organic sector and other related sectors. The dominating opinion was that the planned revision would hinder sustainable development of the organic sector in Europe. In December 2014, the European Commission finally indicated a change in their approach to a new regulation when the Council backed the organic sector demands. Meanwhile, both the European Union as well as the US continued with their approach for mutual recognition and came to terms for bilateral agreements with the Republic of Korea (see contribution by Huber et al., page 126).

Participatory Guarantee Systems (PGS) are locally-focused quality assurance systems. They certify producers based on the active participation of stakeholders and are built on a foundation of trust, social networks, and knowledge exchange. In 2014, PGS celebrated a jubilee. Ten years have passed since the first "International Workshop on Alternative Certification" in Torres/Brazil was organized, and the terminology and conceptual framework for describing what is now known as PGS was developed. It is estimated that 38 countries worldwide have functional PGS initiatives in place. Additionally at least in 17 more countries PGS is currently under development. It is estimated that more than

[1] 1 euro was 1.3777Australian Dollar (AUD) in 2013.

[2] 1 euro = 1.6206New Zealand dollars (average exchange rate 2013); Source: European Central Bank at http://sdw.ecb.europa.eu/browse.do?node=2018794.

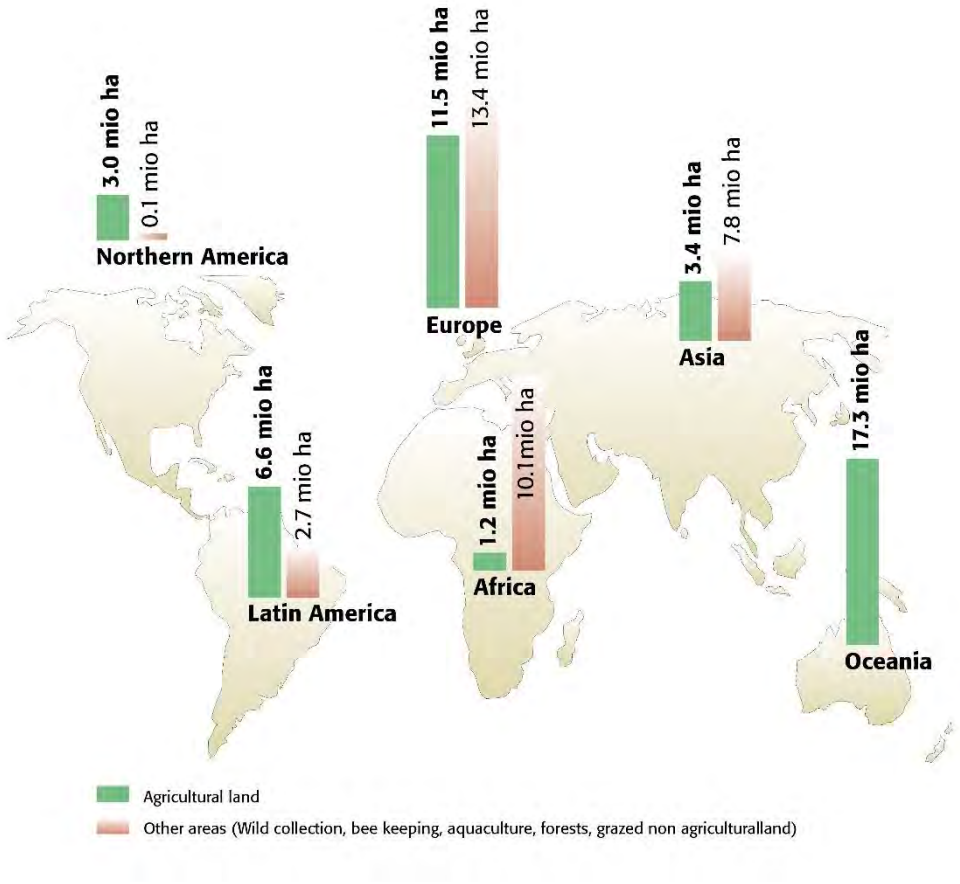
46'000 small operators are currently involved in PGS worldwide, of which more than 17'000 are certified through PGS. It is also estimated that PGS certified producers are currently managing organically a total of at least 49'803 hectares of agricultural land (see the article by Claudia Kirchner page 134).

In his article "The Organic Market Framework: Becoming Organic 3.0", David Gould (page 137) says that to move from Organic 2.0 to Organic 3.0 – where organic is the mainstream – the organic community needs to imagine a different system and framework.

Moving Toward Organic 3.0

Organic 3.0 was launched at BIOFACH in Nuremberg 2014, and the further development of its content is an ongoing process, writes Markus Arbenz, page 272. The main drivers are the BIOFACH Congresses, the IFOAM Organic World Congresses, and various emerging think tanks such as SOAAN, the Sustainable Organic Agriculture Action Network, which defines the aspirations of Organic 3.0 as breaking the organic sector out of its niche status and becoming the mainstream approach to sustainability worldwide. Organic 3.0 improves and builds on Organic 2.0 to meet the apex challenges modern society faces, such as food security, climate change, poverty alleviation, hunger, health, and biodiversity stewardship.

Organic Agriculture Worldwide: Current Statistics



Map 1: Organic agricultural land and wild collection areas in 2013
Source: FiBL-IFOAM survey 2015

Current Statistics on Organic Agriculture Worldwide: Organic Area, Producers, Markets and Selected Crops

Julia Lernoud[1] and Helga Willer[2]

The 16th survey of certified organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture (FiBL) in collaboration with the International Federation of Organic Agriculture Movements (IFOAM Organics International) and further partners. Data from the Mediterranean countries was supplied by the Mediterranean Organic Agriculture Network (MOAN, c/o Mediterranean Agronomic Institute of Bari); and for the Pacific Islands by the Pacific Organic and Ethical Trade Community (POET.com). For Europe, data collected in the framework of the OrganicDataNetwork (www.organicdatanetwork.net) project was used. In total, data was provided by more than 200 experts.

This survey, as with past surveys, was supported by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC),[3] and NürnbergMesse.[4]

As in previous years, governments, private sector organizations, certifiers and market research companies have contributed to the data collection effort. Several international certifiers deserve special mention as they provided data on a number of countries: BCS, CERES, Certisys, Control Union, Ecocert, ICEA, Institute for Marketecology (IMO), LACON, and the Soil Association. A list of all contributors by country is provided in the annex.

Scope

In total, data from 170 countries was available. Andorra, Bahamas, Iraq, Mayotte, Mongolia, and New Caledonia appear new on the list of countries with organic data. For Andorra, data had been available in the past, but for 2012 data was not been received.

Updated data on the organic area was available for 117 countries; however, for some countries, updates were only available for the total organic area, and not necessarily for the number of farms, land use or other indicators. In such cases, data from the previous survey was used. Furthermore, for those countries, for which FiBL compiles the country data among the certifiers, it should be noted that not all certifiers provided updates.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Since 2014, data collection on organic agriculture worldwide is funded by the International Trade Centre (ITC) and the Swiss State Secretariat for Economic Affairs under the project "T4SD Global Platform for Market Data on Organic Agriculture and Sustainability Standards". In this project, an internet-based information system for voluntary sustainability standards (VSS; including organic) data on production, domestic markets and international trade will be established. For more information on this project see page 123.

[4] The organisers of BIOFACH, the World Organic Trade Fair in Nuremberg, Germany (today: NürnbergMesse), have supported data collection on organic agriculture worldwide and the production of the yearbook "The World of Organic Agriculture" since 2000.

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]

Indicators

Data on the following indicators was collected:

- Organic area in hectares, by country and country groups, including a breakdown by crop;
- Livestock numbers;
- Production data (volumes and values);
- Producers and further operator types;
- Domestic market data (total retail sales value, per capita consumption, share of the total market; breakdown by product);
- International trade data (total import and export values and volumes, and breakdown by product).

Not all data that were collected is published in this book (e.g. production, livestock numbers, breakdown by product for domestic market and international trade data), because it was not possible to draw a complete global picture for these indicators. More information about the data background is available at the end of this chapter on page 116.

More information on www.organic-world.net

Tables with more details on crops, market and international trade, as well as explanations for certain data can be found at the Organic-World website (www.organic-world.net).

Contact

Enquiries related to the data should be directed to Julia Lernoud and Helga Willer, FiBL, Frick, Switzerland, e-mail julia.lernoud@fibl.org and helga.willer@fibl.org.

[1] Number of countries and areas are mostly based on countries as listed in the FAO database at http://faostat.fao.org/site/377/default.aspx#ancor as well as some additional countries like Kosovo.

[2] For more information on countries, areas and regions see the UNSTAT website at http://unstats.un.org/unsd/methods/m49/m49.htm.

General notes on the data

Organic areas: Data represent **certified organic land/areas that are already fully converted, as well as land under conversion**, because many data sources do not separate or include the latter (for instance Australia, Austria, Germany, Switzerland), and also because land under conversion is under organic management. For a definition of organic agriculture, see the IFOAM website.[1]

PGS: Since 2011, for some countries, such as Namibia, areas certified by Participatory Guarantee Systems (PGS) are included. (For more information about PGS see the article by Cornelia Kirchner on page 134).

Countries: For countries and areas, the Standard Country and Area Classifications as defined by the United Nations Statistics division, are applied to most of the countries/areas.[2] Where the designation "country" appears in this volume, it covers countries or areas.

Data sources: Data were gathered from organizations of the private sector, governments, and certification bodies. For detailed information on the data sources, please check the annex at the end of this volume.

Direct year-to-year comparison: A direct year-to-year comparison is not always possible for many data, as the data sources may change, or data access may become better.

Completeness of data: For some countries, either no current data were available or the data provided were not complete. For some countries, no data were available at all. Therefore, it can be assumed that the extent of organic agriculture is larger than documented in this volume.

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

Producers: Some countries report the number of smallholders while others report only 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 volume.

Domestic market data: It should be noted that for market and trade data, comparing country statistics remains very problematic, due to differing methods of data collection.

Data revisions: Data revisions and corrections are communicated at www.organic-world.net/statistics-data-revisions.html as well as www.organic-world.net/statistics-data-tables.html.

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[1] The following pages at the IFOAM website are informing about definitions and principles of organic agriculture.
Definition of organic agriculture: http://www.ifoam.org/en/organic-landmarks/definition-organic-agriculture
Principles of organic agriculture: http://www.ifoam.org/about_ifoam/principles/index.html
The IFOAM Organic Guarantee System: http://www.ifoam.org/about_ifoam/standards/ogs.html
IFOAM Family of Standards: http://www.ifoam.org/en/ifoam-family-standards

[2] For the composition of macro geographical (continental) regions, geographical sub-regions, and selected economic and other groupings see the UNSTAT homepage at http://unstats.un.org/unsd/methods/m49/m49regin.htm

Organic agricultural land

Currently, 43.1 million hectares are under organic agricultural management worldwide (end of 2013 for most data).[1]

The region with the most organic agricultural land is Oceania, with 17.3 million hectares, followed by Europe with 11.5 million hectares, Latin America (6.6 million hectares), Asia (3.4 million hectares), North America (3 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, has more than a quarter of the of the world's organic agricultural land, followed by Latin America with 15 percent (see Table 2, Figure 1).

Australia, which has experienced a major growth of organic land since 2011, is the country with the most organic agricultural land; 97 percent of the farmland is extensive grazing area. Argentina is second, followed by the United States in third place (Table 3, Figure 2). The ten countries with the largest organic agricultural areas have a combined total of 30.5 million hectares and constitute more than seventy percent of the world's organic agricultural land.

Apart from the organic agricultural land, there are further organic areas, such as wild collection areas. These areas constitute more than 35 million hectares.

Table 2: World: Organic agricultural land (including in-conversion areas) and regional shares of the global organic agricultural land 2013

Region	Organic agricultural land [hectares]	Regions' share of the global organic agricultural land
Africa	1'227'008	2.8%
Asia	3'425'939	8.0%
Europe	11'460'773	26.6%
Latin America	6'611'636	15.3%
North America	3'047'710	7.1%
Oceania	17'321'733	40.2%
Total	**43'091'113**	**100.0%**

Source: FiBL-IFOAM survey 2015. 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.

[1] Data provided on the conversion status were included in this work. However, some countries provided only data on the fully converted area, others only on the total organic agricultural land, and thus the conversion area is not known for many countries.

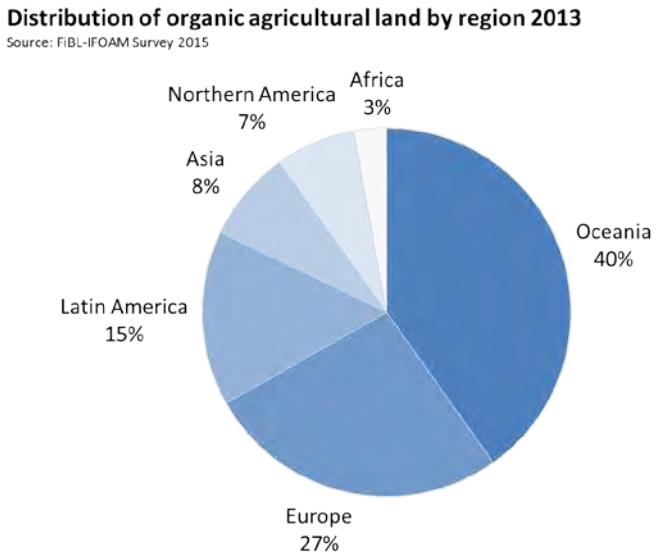

Figure 1: World: Distribution of organic agricultural land by region 2013

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

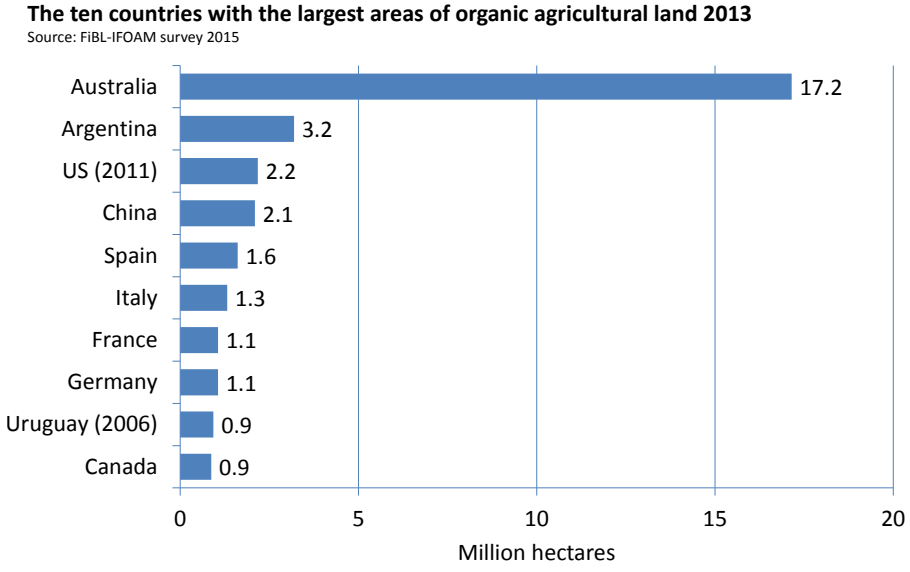

Figure 2: World: The ten countries with the largest areas of organic agricultural land 2013

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

Table 3: World: Organic agricultural land (including in-conversion areas) by country 2013 (sorted)

For an alphabetical country list (including information on data year), see page 277.

Country	Hectares
Australia	17'150'000
Argentina	3'191'255
United States of America	2'178'471
China	2'094'000
Spain	1'610'129
Italy	1'317'177
France	1'060'756
Germany	1'060'669
Uruguay	930'965
Canada	869'239
Brazil	705'233
Poland	661'956
United Kingdom	567'751
Austria	526'689
India	510'000
Mexico	501'364
Sweden	500'996
Czech Republic	474'231
Turkey	461'396
Falkland Islands (Malvinas)	403'212
Ukraine	393'400
Peru	388'448
Greece	383'606
Kazakhstan	291'203
Romania	288'261
Portugal	271'532
Uganda	231'157
Finland	206'170
Latvia	200'433
Tanzania	186'537
Dominican Republic	180'609
Denmark	169'298
Slovakia	166'700
Lithuania	166'330
Ethiopia	164'777
Estonia	151'256
Russian Federation	144'254
Sudan	141'479
Hungary	140'292
Tunisia	139'087
Switzerland	128'140
New Zealand	106'753
Philippines	101'278
Egypt	85'801
Indonesia	65'688
Belgium	62'529
Paraguay	62'274
Bulgaria	56'287

Country	Hectares
Ireland	52'793
Democratic Republic of the Congo	51'838
Norway	51'662
Netherlands	49'394
Ecuador	42'781
Croatia	40'641
Slovenia	38'665
Viet Nam	37'490
South Africa	37'466
Saudi Arabia	36'595
Thailand	33'840
Nicaragua	33'621
Samoa	33'515
Bolivia	32'710
Colombia	31'621
Madagascar	30'265
Ghana	28'201
Honduras	24'950
Timor-Leste	24'690
Chile	23'469
Azerbaijan	23'331
Namibia	23'086
Pakistan	22'397
Moldova	22'102
Republic of Korea	21'210
Papua New Guinea	20'939
Syrian Arab Republic	19'987
Sri Lanka	19'517
Côte d'Ivoire	19'263
Burkina Faso	16'689
Panama	15'183
Mozambique	13'998
Guatemala	13'380
Mongolia	12'922
Tajikistan	12'659
Iran (Islamic Republic of)	12'156
Japan	10'611
Cambodia	9'889
Iceland	9'710
Nepal	9'361
Morocco	8'660
Serbia	8'228
Zambia	7'552
Israel	7'471
Costa Rica	7'449
Cuba	7'389
Senegal	7'176

Statistics: Organic Agricultural Land

Country	Hectares
Bangladesh	6'860
El Salvador	6'736
Bhutan	6'726
Lao PDR	6'442
Palestinian, States of	6'354
Taiwan	5'937
Kenya	4'894
Togo	4'638
Luxembourg	4'448
United Arab Emirates	4'150
Vanuatu	4'106
Sao Tome and Principe	4'051
Cyprus	3'923
Mali	3'727
Rwanda	3'705
Macedonia (FYROM)	3'146
Montenegro	3'068
Jordan	2'898
Haiti	2'878
Kyrgyzstan	2'856
French Guiana (France)	2'702
Comoros	2'642
Lebanon	2'571
Angola	2'486
French Polynesia	2'469
Fiji	2'164
Georgia	1'999
Benin	1'987
Belize	1'982
Guinea-Bissau	1'843
Solomon Islands	1'307
Liechtenstein	1'137
Armenia	1'000
Myanmar	897
Algeria	700
Cameroon	663
Albania	662
Malaysia	603
Réunion (France)	595
Lesotho	560
Burundi	550

Country	Hectares
Jamaica	542
Tonga	398
Zimbabwe	374
Bosnia and Herzegovina	292
Martinique (France)	269
Malawi	265
Channel Islands	260
Faroe Islands	253
Nigeria	250
Dominica	240
Uzbekistan	213
Guadeloupe (France)	193
Kosovo	114
Niger	106
Grenada	85
Niue	61
Afghanistan	61
Bahamas	49
Venezuela	47
Iraq	40
Oman	38
Malta	37
Cook Islands	20
Mauritius	16
Mayotte	5
Swaziland	3
Andorra	1
Belarus (Wild collection only)	
Bermuda (Processing)	
Chad (Wild collection only)	
Guyana (Wild collection only)	
New Caledonia (PGS group)*	
San Marino (Processing)	
Singapore(Processing)	
Total	**43'091'113**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
* For New Caledonia the area data was not available
* Total includes correction value for French overseas departments

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Shares of organic agricultural land by region and country

The share of the world's agricultural land that is organic is 0.98 percent (for the countries included in the survey).

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 European Union, the share of organic agricultural land is 5.7 percent. In the other regions, the share is less than one percent (see Table 4).

Many individual countries, however, feature much higher shares (Figure 3), and eleven countries have even reached more than ten percent of the agricultural land as organic; most of these are in Europe. The country with the highest organic share of agricultural land is the Falkland Islands (Malvinas), where several large sheep farms are working organically. It is interesting to note that many island states have high shares of organic agricultural land.

However, 59 percent of the countries, for which data was available, have less than one percent organic agricultural land (Figure 4).

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	1'227'088	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**	**43'091'113**	**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.

To calculate the percentages, the data for most countries were taken from the FAO Statistical database FAOSTAT.[1] For the European Union, most data were taken from Eurostat.[2] Where available, data from ministries was used for total agricultural land (for instance U.S., Switzerland, and Austria), which sometimes differ from those published by Eurostat or FAOSTAT.

Please note that the calculation of the shares of organic agricultural land, based on the Eurostat and FAOSTAT data, might differ, in some cases, from the data communicated by ministries or experts.

[1] FAOSTAT, Data Archives, the FAO Homepage, FAO, Rome at faostat.fao.org > Resources > Resourcestat at http://faostat.fao.org/site/377/default.aspx#ancor

[2] Eurostat: Basic data – key agricultural statistics at http://ec.europa.eu/agriculture/agrista/2007/table_en/2012.pdf, The Eurostat Homepage, Eurostat, Luxembourg

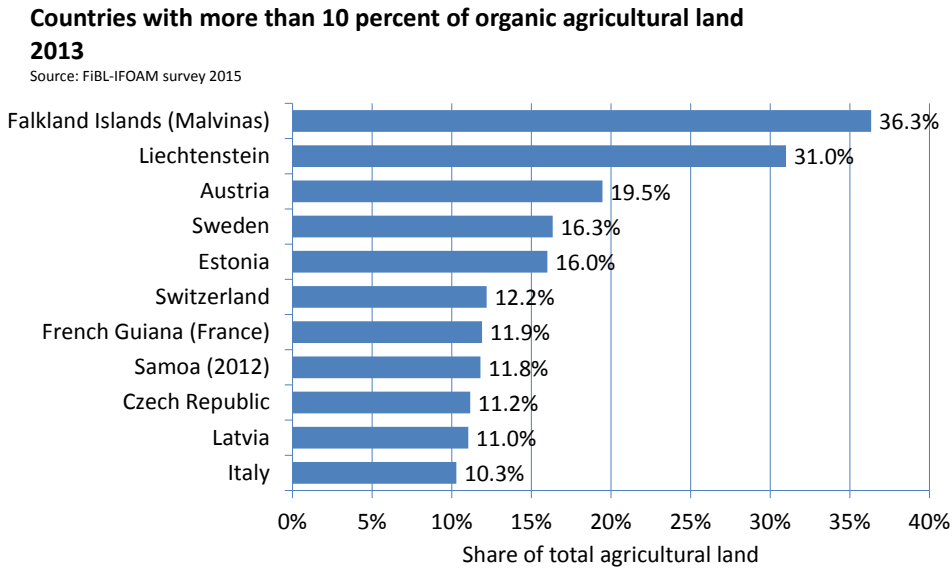


Figure 3: World: Countries with more than 10 percent of organic agricultural land 2013

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

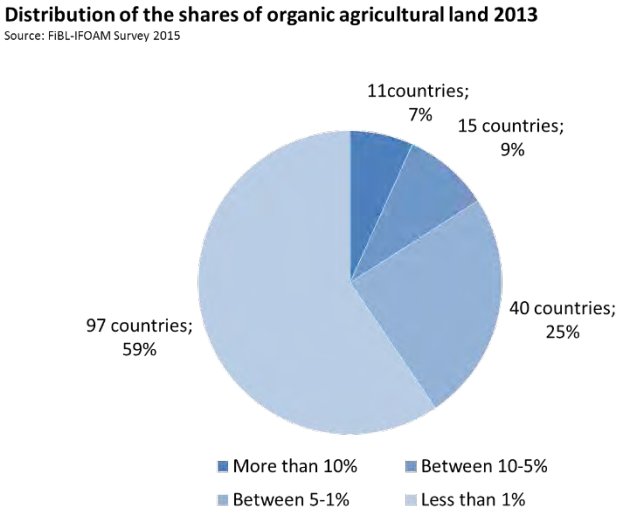


Figure 4: World: Distribution of the shares of organic agricultural land 2013

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

Table 5: World: Shares of organic agricultural land by country 2013, sorted

For an alphabetical country list (including information on data year), see page 277

Country	Share
Falkland Islands (Malvinas)	36.3%
Liechtenstein	31.0%
Austria	19.5%
Sweden	16.3%
Estonia	16.0%
Switzerland	12.2%
French Guiana (France)	11.9%
Samoa	11.8%
Czech Republic	11.2%
Latvia	11.0%
Italy	10.3%
Dominican Republic	9.3%
Finland	9.0%
Slovakia	8.8%
Faroe Islands	8.4%
Slovenia	8.4%
Portugal	8.1%
Sao Tome and Principe	7.2%
Timor-Leste	6.6%
Spain	6.5%
Denmark	6.4%
Germany	6.4%
Uruguay	6.3%
Lithuania	5.7%
French Polynesia	5.5%
Norway	4.8%
Mongolia	4.7%
Greece	4.6%
Belgium	4.6%
Poland	4.3%
Australia	4.2%
France	3.9%
Luxembourg	3.4%
Hungary	3.3%
United Kingdom	3.3%
Croatia	3.1%
Channel Islands	3.0%
Cyprus	2.7%
Netherlands	2.6%
Mexico	2.3%
Egypt	2.3%
Argentina	2.3%
Vanuatu	2.2%
Romania	2.1%
Turkey	1.9%
Bulgaria	1.8%
Papua New Guinea	1.8%
Peru	1.8%
Palestinian, State of	1.7%
Comoros	1.7%
Uganda	1.7%

Country	Share
Solomon Islands	1.6%
Réunion (France)	1.5%
Israel	1.4%
Tunisia	1.4%
Bhutan	1.3%
Belize	1.3%
Canada	1.3%
Tonga	1.3%
Ireland	1.3%
Niue	1.2%
Republic of Korea	1.1%
Dominica	1.0%
Martinique (France)	1.0%
Ukraine	1.0%
New Zealand	0.9%
Moldova	0.9%
Philippines	0.8%
Honduras	0.8%
Sri Lanka	0.7%
United Arab Emirates	0.7%
Taiwan	0.7%
Grenada	0.7%
Panama	0.7%
Cook Islands	0.7%
Nicaragua	0.7%
United States of America	0.6%
Montenegro	0.6%
Ecuador	0.6%
Tanzania	0.5%
Fiji	0.5%
Azerbaijan	0.5%
Bahamas	0.5%
Ethiopia	0.5%
Guadeloupe (France)	0.5%
El Salvador	0.4%
Iceland	0.4%
Costa Rica	0.4%
China	0.4%
Lebanon	0.4%
Viet Nam	0.4%
Malta	0.4%
Guatemala	0.3%
Paraguay	0.3%
Macedonia (FYROM)	0.3%
India	0.3%
Jordan	0.3%
Lao People's Democratic Republic	0.3%
Japan	0.3%
Brazil	0.3%
Tajikistan	0.3%
Democratic Republic of the Congo	0.2%

Statistics: Shares of Organic Agricultural Land

Country	Share
Nepal	0.2%
Rwanda	0.2%
Ghana	0.2%
Cambodia	0.2%
Thailand	0.2%
Serbia	0.2%
Haiti	0.2%
Chile	0.1%
Syrian Arab Republic	0.1%
Kazakhstan	0.1%
Burkina Faso	0.1%
Togo	0.1%
Jamaica	0.1%
Indonesia	0.1%
Guinea-Bissau	0.1%
Cuba	0.1%
Sudan	0.1%
Côte d'Ivoire	0.1%
Bolivia	0.1%
Pakistan	0.1%
Georgia	0.1%
Senegal	0.1%
Bangladesh	0.1%
Colombia	0.1%
Madagascar	0.1%
Russian Federation	0.1%
Benin	0.1%
Namibia	0.1%
Armenia	0.1%
Albania	0.1%
South Africa	0.04%
Zambia	0.03%
Kosovo	0.03%
Morocco	0.03%
Mozambique	0.03%
Kyrgyzstan	0.03%
Burundi	0.03%
Iran (Islamic Republic of)	0.03%
Lesotho	0.02%
Saudi Arabia	0.02%
Kenya	0.02%
Mauritius	0.02%
Bosnia and Herzegovina	0.01%
Mali	0.01%
Malaysia	0.01%
Myanmar	0.01%
Andorra	0.01%
Cameroon	0.01%
Malawi	0.005%
Angola	0.004%
Zimbabwe	0.002%
Venezuela (Bolivarian Republic of)	0.002%
Oman	0.002%
Algeria	0.002%
Iraq	0.001%
Uzbekistan	0.001%
Nigeria	0.0003%
Swaziland	0.0003%
Niger	0.0002%
Afghanistan	0.0002%
Mayotte	-
Belarus (Wild collection only)	
Bermuda (Processing)	
Chad (Wild collection only)	
Guyana (Wild collection only)	
New Caledonia (PGS group)*	
San Marino (Processing)	
Singapore(Processing)	
Total	**0.98%**

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

* For New Caledonia, area data was not available
* Total includes correction value for French overseas departments

Development of the organic agricultural land

Compared with 1999, when 11 million hectares were organic, the organic agricultural land almost quadrupled (Willer/Yussefi 2000). In 2013, 5.6 million hectares more or almost 15 percent more were reported compared with 2012. 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).

In 2013, the area of organic agricultural land increased in all regions except in Latin America (Table 6). The highest absolute growth was in Oceania (+42 percent, +5.2 million hectares). In Latin America the area decreased by 3 percent, as Argentina, reported almost 400'000 hectares less in 2013 (mainly grassland/grazing areas).

Seventy-two countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 31 countries. In 61 countries, the organic agricultural area either did not change or no new data were received. The largest increases of organic agricultural land, after Australia, were in China, Peru, and Italy.

The figures communicated in the following tables and graphs with historical figures may differ from previously communicated as data revisions were received and included in the FiBL database. More information is available in the annex, page 281.

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	1'227'088	+77'627	+6.75%
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**	**43'091'113**	**+5'600'898**	**+14.94%**

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.

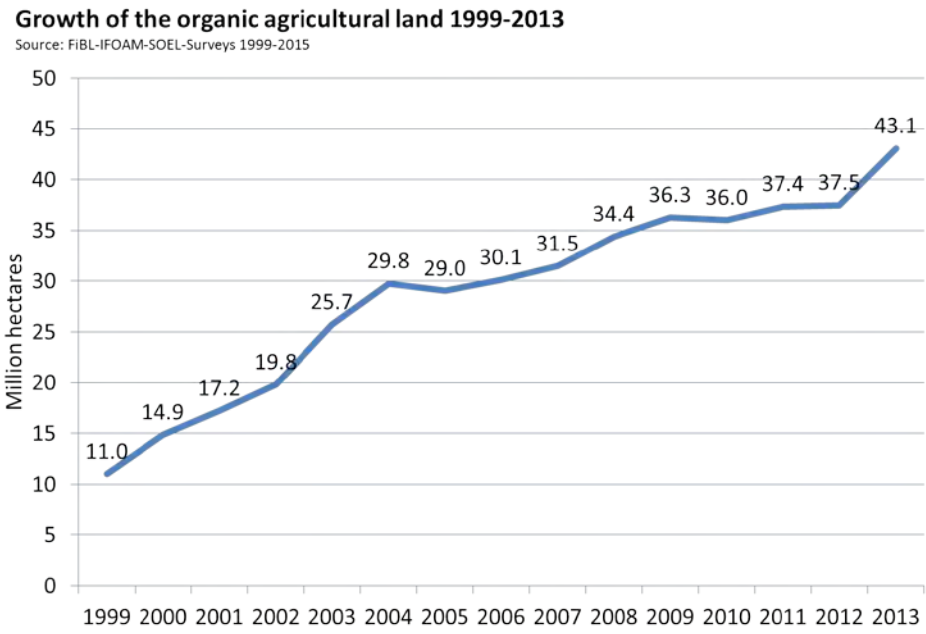


Figure 5: World: Growth of the organic agricultural land 1999-2013

Source: FiBL-IFOAM-SOEL surveys 2000-2015

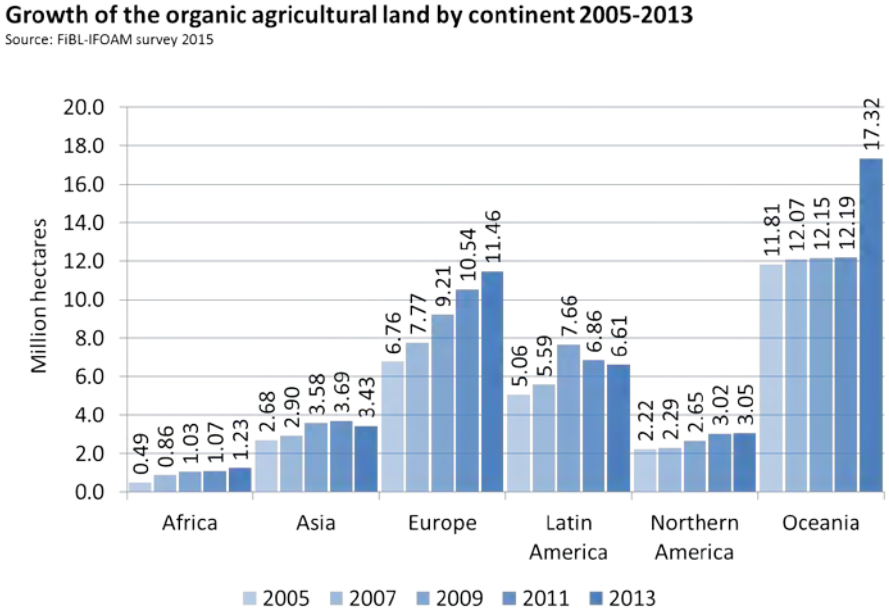


Figure 6: Growth of the organic agricultural land by continent 2005 to 2013

Source: FiBL-IFOAM-SOEL surveys 2000-2015

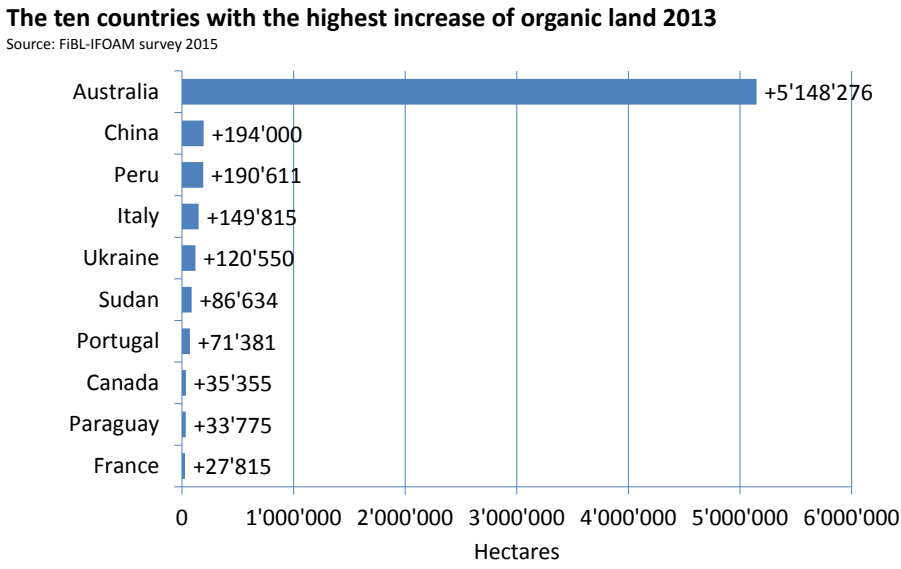


Figure 7: World: The countries with the highest increase of organic agricultural land 2013

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

Table 7: World: Development of organic agricultural land by country 2010-2013

Important note: A direct year-to-year comparison is not always possible for many countries, because the data sources may have changed over the years, or data access may have improved. The figures published here may differ from previously published data due to data revisions. Data are not available for all countries for every year and, in these cases, the figure of the previous year is used (see also page 281).

Country	2010 [ha]	2011 [ha]	2012 [ha]	2013 [ha]	Change 12/13 [ha]	Change 12/13 %
Afghanistan	61	61	61	61		
Albania	284	448	515	662	147	28.5%
Algeria	623	692	700	700		
Andorra	2	4		1	1	
Angola			2'486	2'486		
Argentina	4'177'653	3'796'136	3'637'466	3'191'255	-446'211	-12.3%
Armenia	750	750	810	1'000	190	23.5%
Australia	12'001'724	12'001'724	12'001'724	17'150'000	5'148'276	42.9%
Austria	543'605	542'553	537'706	526'689	-11'017	-2.0%
Azerbaijan	21'347	21'959	23'740	23'331	-409	-1.7%
Bahamas				49	49	
Bangladesh	799	6'810	6'860	6'860		
Belarus			Wild collection only			
Belgium	59'220	55'304	59'718	62'529	2'811	4.7%
Belize	1'177	1'204	1'860	1'982	122	6.6%
Benin	1'167	1'696	2'628	1'987	-642	-24.4%
Bermuda			Processing only			
Bhutan		6'150	6'156	6'726	570	9.3%
Bolivia	112'109	32'710	32'710	32'710		
Bosnia and Herzegovina	580	343	343	292	-51	-14.9%
Brazil	932'120	687'040	705'233	705'233		
Bulgaria	25'648	25'022	39'137	56'287	17'150	43.8%
Burkina Faso	13'802	19'684	15'000	16'689	1'689	11.3%
Burundi	350	550	550	550		
Cambodia	8'084	8'285	9'055	9'889	835	9.2%
Cameroon	496	849	663	663		
Canada	703'678	841'216	833'883	869'239	35'355	4.2%
Chad			Wild collection only			
Channel Islands	360	250	260	260		
Chile	31'696	29'068	22'636	23'469	833	3.7%
China	1'390'000	1'900'000	1'900'000	2'094'000	194'000	10.2%
Colombia	33'334	34'060	34'060	31'621	-2'438	-7.2%
Comoros	1'045	2'642	2'642	2'642		
Cook Islands	18	20	20	20		
Costa Rica	11'114	9'570	9'360	7'449	-1'911	-20.4%
Côte d'Ivoire	18'133	20'658	19'457	19'263	-194	-1.0%
Croatia	23'352	32'036	31'903	40'641	8'737	27.4%
Cuba	2'106	2'209	5'280	7'389	2'109	39.9%
Cyprus	3'575	3'575	3'923	3'923		
Czech Republic	448'202	460'498	468'670	474'231	5'561	1.2%
Democratic Republic of the Congo	32'523	41'032	51'838	51'838		
Denmark	162'903	162'173	175'113	169'298	-5'815	-3.3%
Dominica		240	240	240		
Dominican Republic	165'109	186'931	168'978	180'609	11'631	6.9%
Ecuador	64'751	50'037	56'037	42'781	-13'255	-23.7%
Egypt	82'167	82'167	85'801	85'801		

Country	2010 [ha]	2011 [ha]	2012 [ha]	2013 [ha]	Change 12/13 [ha]	Change 12/13 %
El Salvador	6'736	6'736	6'736	6'736		
Estonia	112'972	133'779	144'150	151'256	7'106	4.9%
Ethiopia	137'196	140'475	164'777	164'777		
Falkland Islands (Malvinas)	398'806	398'806	403'212	403'212		
Faroe Islands	253	253	253	253		
Fiji	100	2'006	2'164	2'164		
Finland	169'168	188'189	197'751	206'170	8'419	4.3%
France	845'442	975'141	1'032'941	1'060'756	27'815	2.7%
French Guiana (France)	1'776	3'974	2'407	2'702	295	12.3%
French Polynesia	1'727	105	2'469	2'469		
Georgia	1'401	1'999	1'999	1'999		
Germany	990'702	1'015'626	1'034'355	1'060'669	26'314	2.5%
Ghana	12'635	19'893	28'161	28'201	40	0.1%
Greece	309'823	213'276	462'618	383'606	-79'012	-17.1%
Grenada	85	85	85	85		
Guadeloupe (France)	27	166	164	193	29	17.7%
Guatemala	13'375	13'380	13'380	13'380		
Guinea-Bissau				1'843	1'843	
Guyana	4'249	4'249	4'249		Wild collection	
Haiti	188	912	806	2'878	2'073	257.2%
Honduras	17'825	23'826	24'950	24'950		
Hungary	127'605	124'402	130'609	140'292	9'683	7.4%
Iceland	5'806	8'246	8'240	9'710	1'470	17.8%
India	780'000	1'084'266	500'000	510'000	10'000	2.0%
Indonesia	83'630	74'034	88'247	65'688	-22'560	-25.6%
Iran (Islamic Republic of)	7'256	43'332	42'634	12'156	-30'478	-71.5%
Iraq				40	40	
Ireland	47'864	54'122	52'793	52'793		
Israel	8'794	7'095	6'187	7'471	1'284	20.8%
Italy	1'113'742	1'096'889	1'167'362	1'317'177	149'815	12.8%
Jamaica	542	542	542	542		
Japan	9'067	9'401	10'611	10'611		
Jordan	1'469	2'567	2'895	2'898	3	0.1%
Kazakhstan	133'562	196'215	291'203	291'203		
Kenya	4'842	4'969	4'894	4'894		
Kosovo		11	111	114	3	2.8%
Kyrgyzstan	15'040	15'097	2'696	2'856	160	5.9%
Lao PDR	6'006	5'990	5'990	6'442	452	7.5%
Latvia	166'320	184'096	195'658	200'433	4'775	2.4%
Lebanon	1'227	3'303	3'303	2'571	-732	-22.2%
Lesotho		183	617	560	-57	-9.2%
Liechtenstein	1'020	1'095	1'086	1'137	51	4.7%
Lithuania	143'644	152'305	156'539	166'330	9'791	6.3%
Luxembourg	3'720	3'720	4'130	4'448	318	7.7%
Macedonia (FYROM)	35'164	26'431	12'731	3'146	-9'585	-75.3%
Madagascar	20'254	30'243	30'265	30'265		
Malawi	824	166	35	265	229	647.5%
Malaysia	1'582	1'582	603	603		
Mali	15'199	14'790	14'927	3'727	-11'200	-75.0%
Malta	24	23	37	37		
Martinique (France)	193	298	200	269	69	34.5%
Mauritius	35	30	16	16		

Statistics: Development of Organic Agricultural Land

Country	2010 [ha]	2011 [ha]	2012 [ha]	2013 [ha]	Change 12/13 [ha]	Change 12/13 %
Mayotte				5	5	
Mexico	332'485	366'904	487'393	501'364	13'970	2.9%
Moldova	32'105	22'102	22'102	22'102		
Mongolia				12'922	12'922	
Montenegro	3'561	3'068	3'068	3'068		
Morocco	17'030	17'030	16'600	8'660	-7'940	-47.8%
Mozambique	5'519	4'468	3'840	13'998	10'158	264.5%
Myanmar	60	202	897	897		
Namibia	124	14'112	14'123	23'086	8'963	63.5%
Nepal	9'789	8'697	10'273	9'361	-913	-8.9%
Netherlands	46'233	47'205	48'038	49'394	1'356	2.8%
New Caledonia	PGS group (area data not available)					
New Zealand	124'464	133'321	106'753	106'753		
Nicaragua	33'621	33'621	33'621	33'621		
Niger	48	76	106	106		
Nigeria	11'979	9'473	9'521	250	-9'271	-97.4%
Niue	159	61	61	61		
Norway	57'219	55'500	55'260	51'662	-3'598	-6.5%
Oman	39	38	38	38	-0.1	-0.3%
Pakistan	22'103	24'924	22'397	22'397		
Palestinian, State of	6'354	6'354	6'354	6'354		
Panama	3'242	4'576	4'576	15'183	10'607	231.8%
Papua New Guinea	3'156	11'337	11'798	20'939	9'141	77.5%
Paraguay	51'223	51'190	28'499	62'274	33'775	118.5%
Peru	216'756	185'964	197'837	388'448	190'611	96.3%
Philippines	79'992	96'317	80'974	101'278	20'304	25.1%
Poland	521'970	609'412	661'956	661'956		
Portugal	201'054	200'151	200'151	271'532	71'381	35.7%
Republic of Korea	15'518	19'312	25'467	21'210	-4'257	-16.7%
Réunion (France)	276	556	594	595	1	0.2%
Romania	182'706	229'946	288'261	288'261		
Russian Federation	44'017	126'848	146'251	144'254	-1'997	-1.4%
Rwanda	3'600	3'705	3'705	3'705		
Samoa	9'714	33'515	33'515	33'515		
San Marino	Processing only					
Sao Tome and Principe	4'411	4'467	4'051	4'051		
Saudi Arabia	42'376	18'563	13'569	36'595	23'026	169.7%
Senegal	28'175	13'000	6'736	7'176	440	6.5%
Serbia	8'635	6'237	6'340	8'228	1'888	29.8%
Singapore	Processing only					
Slovakia	174'471	166'700	166'700	166'700		
Slovenia	30'696	32'149	35'101	38'665	3'564	10.2%
Solomon Islands	1'306	1'307	1'307	1'307		
South Africa	55'621	41'947	43'170	37'466	-5'705	-13.2%
Spain	1'456'672	1'621'898	1'593'197	1'610'129	16'932	1.1%
Sri Lanka	22'260	19'469	19'517	19'517		
Sudan	53'602	53'017	54'845	141'479	86'634	158.0%
Swaziland	6	14	8	3	-5	-59.0%
Sweden	438'693	480'185	477'685	500'996	23'311	4.9%
Switzerland	119'613	123'000	125'961	128'140	2'179	1.7%
Syrian Arab Republic	19'987	19'987	19'987	19'987		
Taiwan	2'962	5'016	5'850	5'937	87	1.5%
Tajikistan	391	460	12'659	12'659		
Tanzania	72'665	115'022	186'537	186'537		

Country	2010 [ha]	2011 [ha]	2012 [ha]	2013 [ha]	Change 12/13 [ha]	Change 12/13 %
Thailand	34'079	34'829	32'577	33'840	1'263	3.9%
Timor-Leste	24'750	24'754	24'690	24'690		
Togo	3'409	1'336	3'889	4'638	749	19.3%
Tonga		248	398	398		
Tunisia	175'066	178'521	137'188	139'087	1'899	1.4%
Turkey	383'782	442'582	523'627	461'396	-62'231	-11.9%
Uganda	228'419	228'166	231'157	231'157		
Ukraine	270'226	270'320	272'850	393'400	120'550	44.2%
United Arab Emirates	360	958	3'905	4'150	245	6.3%
United Kingdom	699'638	638'528	590'009	567'751	-22'258	-3.8%
United States of America	1'769'001	2'178'471	2'178'471	2'178'471		
Uruguay	930'965	930'965	930'965	930'965		
Uzbekistan	65	209	213	213		
Vanuatu	2'664	2'197	4'106	4'106		
Venezuela (Bolivarian Republic of)	337	59	59	47	-12	-20.5%
Viet Nam	19'272	23'134	36'285	37'490	1'205	3.3%
Zambia	7'310	7'310	7'310	7'552	242	3.3%
Zimbabwe	1'995	466	626	374	-252	-40.3%
Total*	36'017'570	37'357'155	37'490'215	43'091'113	5'600'898	14.9%

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see previous editions of "The World of Organic Agriculture" and annex, page 281.
*Total includes correction value for French overseas departments.

All organic areas, including non-agricultural areas

Apart from the organic agricultural land, there are additional organic areas. The largest part of these are wild collection areas and areas for beekeeping. Further areas are for aquaculture, forest areas, and grazing areas on non-agricultural land. According to the FiBL-IFOAM survey, these areas totalled more than 35 million hectares, and all organic areas together constituted 78 million hectares.

It should be noted that many countries do not report the non-agricultural organic areas; they only communicate the organic agricultural land area. We can, therefore, assume that the data on the other areas is incomplete, in particular the data for aquaculture and forests.

More information on the use of the wild collection areas is available in the corresponding chapter (page 76).

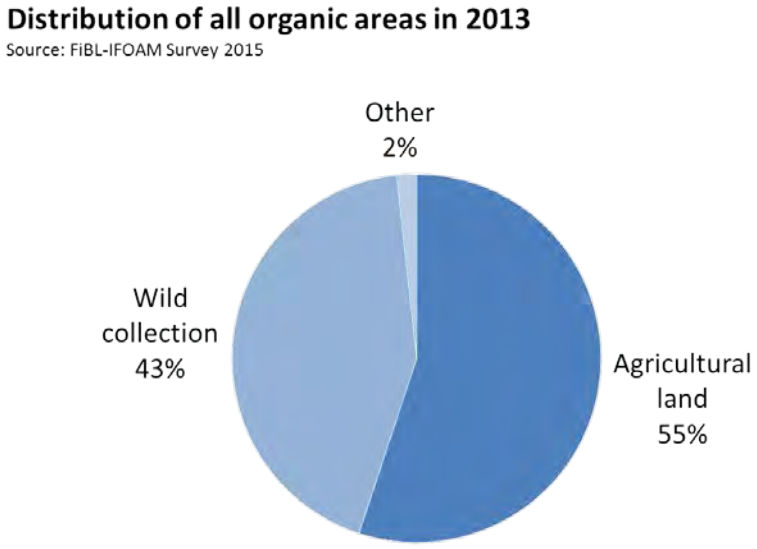


Figure 8: World: Distribution of all organic areas 2013. Total: 78 million hectares

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

Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2013

Region	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]*	Other non agr. land [ha]	Total [ha]
Africa	1'227'088		42'796		10'118'473	840'000	12'228'358
Asia	3'425'939	45'302	123		7'794'340	115	11'265'818
Europe	11'460'773	5'050	27'130	24'094	13'357'745	15'559	24'890'350
Latin America	6'611'636	3'127	3'000		2'749'717	34'264	9'401'744
North America	3'047'710		68	4'317	71'821		3'123'915
Oceania	17'321'733				765		17'322'498
Total*	**43'091'113**	**53'478**	**73'117**	**28'411**	**34'092'861**	**889'938**	**78'228'918**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.
* Wild collection and beekeeping areas
** Total includes correction value for French overseas departments.

Table 9: World: All organic areas by country 2013

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Afghanistan	61						61
Albania	662				330'677		331'339
Algeria	700						700
Andorra	1						1
Angola	2'486						2'486
Argentina	3'191'255				458'601	26'118	3'675'974
Armenia	1'000				11'250		12'250
Australia	17'150'000						17'150'000
Austria	526'689						526'689
Azerbaijan	23'331		123		937		24'391
Bahamas	49						49
Bangladesh	6'860	9'338					16'198
Belarus					2'742		2'742
Belgium	62'529				3	152	62'684
Belize	1'982						1'982
Benin	1'987				3'543		5'530
Bermuda			Processing only				
Bhutan	6'726				15'605		22'330
Bolivia	32'710				785'453		818'163
Bosnia and Herzegovina	292				63'910		64'202
Brazil	705'233				1'209'773		1'915'006
Bulgaria	56'287				679'845		736'132
Burkina Faso	16'689				80'018		96'707
Burundi	550						550
Cambodia	9'889						9'889
Cameroon	663				110'000		110'663
Canada	869'239		68	4'317	71'821		945'444

Statistics: All Organic Areas

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Chad					11'000		11'000
Channel Islands	260						260
Chile	23'469				61'751	8'146	93'366
China	2'094'000				1'435'000		3'529'000
Colombia	31'621				7'320		38'941
Comoros	2'642				70		2'712
Cook Islands	20						20
Costa Rica	7'449						7'449
Côte d'Ivoire	19'263				344		19'608
Croatia	40'641				8		40'648
Cuba	7'389						7'389
Cyprus	3'923						3'923
Czech Republic	474'231						474'231
Democratic Republic of the Congo	51'838						51'838
Denmark	169'298				2'648		171'946
Dominica	240						240
Dominican Republic	180'609				5'260		185'869
Ecuador	42'781	3'123	3'000		1'260		50'164
Egypt	85'801						85'801
El Salvador	6'736						6'736
Estonia	151'256			2'135	40'579		193'969
Ethiopia	164'777				180		164'957
Falkland Islands (Malvinas)	403'212						403'212
Faroe Islands	253						253
Fiji	2'164				653		2'817
Finland	206'170				9'000'000		9'206'170
France	1'060'756	1			2'809		1'063'566
French Guiana (France)	2'702						2'702
French Polynesia	2'469						2'469
Georgia	1'999				1'405		3'405
Germany	1'060'669						1'060'669
Ghana	28'201				19'813		48'014
Greece	383'606						383'606
Grenada	85						85
Guadeloupe (France)	193						193
Guatemala	13'380				5		13'385
Guinea-Bissau	1'843						1'843
Guyana					58'000		58'000
Haiti	2'878						2'878
Honduras	24'950						24'950
Hungary	140'292						140'292
Iceland	9'710			7'727	212'763		230'200
India	510'000				5'180'000		5'690'000
Indonesia	65'688	94			10'330		76'111

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Iran	12'156				27'552		39'708
Iraq	40						40
Ireland	52'793						52'793
Israel	7'471						7'471
Italy	1'317'177				62'647		1'379'824
Jamaica	542				0		542
Japan	10'611					115	10'726
Jordan	2'898						2'898
Kazakhstan	291'203				863		292'066
Kenya	4'894				130'903		135'797
Kosovo	114						114
Kyrgyzstan	2'856						2'856
Lao PDR	6'442				16'786		23'228
Latvia	200'433						200'433
Lebanon	2'571						2'571
Lesotho	560				50'000		50'560
Liechtenstein	1'137						1'137
Lithuania	166'330	5'049				747	172'125
Luxembourg	4'448						4'448
Macedonia (FYROM)	3'146			8'112	198'000		209'258
Madagascar	30'265				23'711		53'975
Malawi	265						265
Malaysia	603						603
Mali	3'727				3'978		7'705
Malta	37						37
Martinique (France)	269						269
Mauritius	16						16
Mayotte	5						5
Mexico	501'364				30'364		531'727
Moldova	22'102						22'102
Mongolia	12'922						12'922
Montenegro	3'068				139'809		142'877
Morocco	8'660				817'690		826'350
Mozambique	13'998				31'400		45'398
Myanmar	897						897
Namibia	23'086				2'400'000		2'423'086
Nepal	9'361				24'422		33'783
Netherlands	49'394						49'394
New Caledonia			PGS group (area data not available)				
New Zealand	106'753						106'753
Nicaragua	33'621				11'463		45'084
Niger	106						106
Nigeria	250		150				400
Niue	61				112		173
Norway	51'662						51'662
Oman	38						38
Pakistan	22'397						22'397
Palestinian, State of	6'354						6'354
Panama	15'183						15'183

Statistics: All Organic Areas

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Papua New Guinea	20'939						20'939
Paraguay	62'274						62'274
Peru	388'448	4			120'467		508'919
Philippines	101'278						101'278
Poland	661'956						661'956
Portugal	271'532		19'533				291'065
Republic of Korea	21'210						21'210
Réunion (France)	595						595
Romania	288'261				1'082'138		1'370'399
Russian Federation	144'254				13'723		157'977
Rwanda	3'705				80		3'784
Samoa	33'515						33'515
San Marino				Processing only			
Sao Tome and Principe	4'051						4'051
Saudi Arabia	36'595						36'595
Senegal	7'176				22'000		29'176
Serbia	8'228						8'228
Singapore				Processing only			
Slovakia	166'700						166'700
Slovenia	38'665						38'665
Solomon Islands	1'307						1'307
South Africa	37'466				31'709		69'175
Spain	1'610'129				38'184	11'603	1'659'916
Sri Lanka	19'517						19'517
Sudan	141'479				5'000	840'000	986'479
Swaziland	3						3
Sweden	500'996					3'057	504'053
Switzerland	128'140			6'121			134'261
Syrian Arab Republic	19'987				8'000		27'987
Taiwan	5'937						5'937
Tajikistan	12'659				1'055'890		1'068'549
Tanzania	186'537				15'040		201'577
Thailand	33'840	270					34'109
Timor-Leste	24'690						24'690
Togo	4'638				242		4'880
Tonga	398						398
Tunisia	139'087		42'646				181'733
Turkey	461'396				957'261		1'418'657
Uganda	231'157				158'328		389'485
Ukraine	393'400				530'000		923'400
United Arab Emirates	4'150						4'150
United Kingdom	567'751		7'597				575'348
United States of America	2'178'471						2'178'471

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Uruguay	930'965						930'965
Uzbekistan	213				5'000		5'213
Vanuatu	4'106						4'106
Venezuela	47						47
Viet Nam	37'490	35'600			1'300		74'390
Zambia	7'552				6'133'424		6'140'976
Zimbabwe	374				70'000		70'374
Total*	**43'091'113**	**53'478**	**73'117**	**28'411**	**34'092'861**	**889'938**	**78'228'918**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.
* Total includes correction value for French overseas departments.

Organic producers and other operator types

Producers

Almost 2 million organic producers were reported in the current survey. According to the data obtained, more than three-quarters of the producers are in Asia, Africa, and Latin America (see Figure 9). The country with the most producers is India, followed by Uganda and Mexico (see Figure 10).

There has been an increase of more than 71'000 producers, or almost 4 percent over 2012. In 2013, India, Papua New Guinea, Turkey, Peru, and Senegal reported significant increases. The sum of these five countries represents almost the total global increase.

Finding precise figures on the number of organic farms remains difficult, as:

- Some countries report only the numbers of companies, projects, or grower groups, which may each comprise a number of individual producers;
- Some countries do not provide data on the number of producers at all;
- Some countries with wild collection areas include collectors; and
- Some countries provide the number of producers per crop, and there may be overlaps for those growers who grow several crops.

The number of producers should, therefore, be treated with caution, and it may be assumed that the total number of organic producers is higher than that reported here.

Table 10: World: Development of the numbers of producers by region 2012 to 2013

Region	2012 [no.]	2013 [no.]	Change in numbers	Change in %
Africa	572'863	574'129	+1'266	+0.2
Asia	685'437	730'744	+45'307	+6.6
Europe	321'474	334'870	+13'396	+4.2
Latin America	316'583	319'459	+2'876	+0.9
North America	16'470	16'393	-77	-0.5
Oceania	14'605	22'997	+8'392	+57.5
Total	**1'927'432**	**1'998'592**	**+71'160**	**+3.7**

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

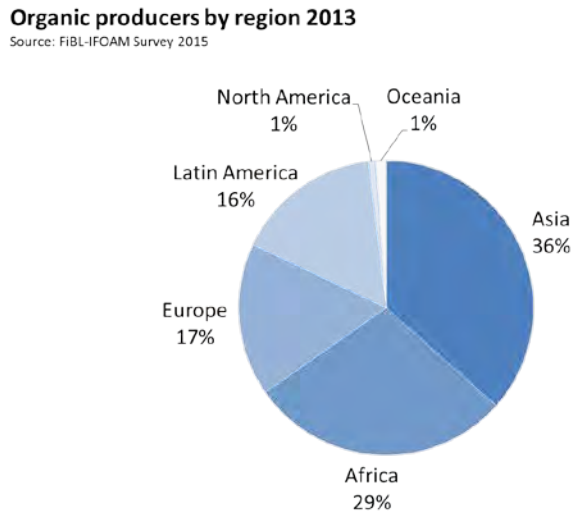


Figure 9: World: Distribution of organic producers by region 2013 (Total: 2 million producers)

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

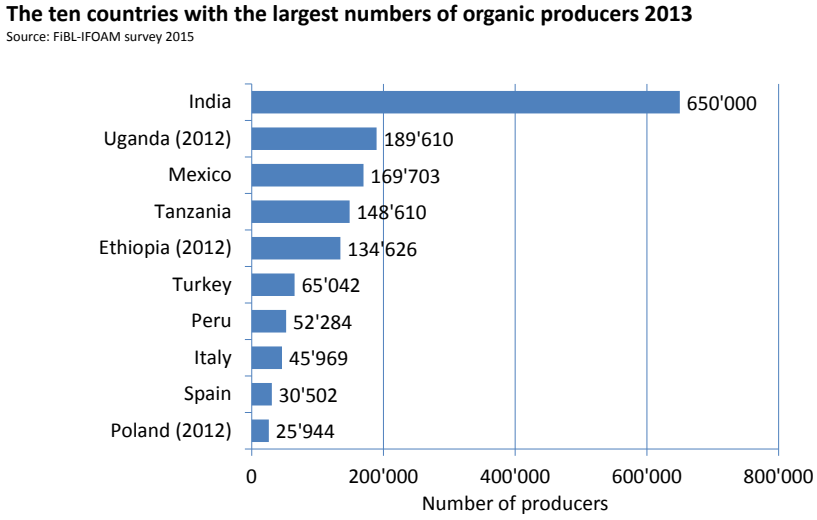


Figure 10: World: The ten countries with the largest numbers of organic producers 2013

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

Further operator types

Regarding data on further operator types, there are at almost 51'000 processors and at least 6'200 importers; most of these in Europe. However, not all countries reported the number of processors, exporters, importers or other operator types. For instance, data for the United States is missing, and it can be assumed that the number of processors, importers and exporters is far higher than that indicated in the table below.

Further operator types reported were beekeepers, exporters, importers, smallholder groups, and aquaculture enterprises, as well as the number of collectors (wild collection).

Table 11: World: Organic producers and other operator types by country 2013

We are doing our best to ensure that this overview table, which was published for the first time in the 2011 edition of "The World of Organic Agriculture", will be more comprehensive in the future. For many countries (particularly those with no private or governmental data collection system), data on the various operator types are missing or are incomplete, and only the number of producers or the total number of all operators is available.

Country	Producers[1]	Processors	Importers	Exporters
Afghanistan	264			
Albania (2012)	46	27	4	20
Algeria	57			
Andorra				
Angola				
Argentina	1'018	289		125
Armenia	21	13		
Australia	1'707	719		
Austria	21'810			
Azerbaijan	288	14		
Bahamas				
Bangladesh (2011)	9'335			
Belarus				
Belgium	1'487	787	121	
Belize	900			
Benin	2'355	4 (2012)		9 (2012)
Bermuda (2012)				
Bhutan				2
Bolivia (2011)	9'837	273		
Bosnia and Herzegovina	24	8		6
Brazil (2012)	12'526			
Bulgaria	3'854	92	3	10
Burkina Faso	11'395	23		24 (2012)
Burundi	36 (2011)	1 (2009)		1 (2009)
Cambodia	6'753	2		2
Cameroon (2012)	88	8		16
Canada	3'513	1'447		
Chad (2012)				
Chile	446	133		88
Colombia	4'775	47		45
Comoros	1'416 (2011)	4 (2009)		4 (2009)
Cook Islands (2012)	44			
Costa Rica	3'000 (2009)	61 (2012)		

[1] Some countries report only the numbers of companies, projects or growers groups, which my each compromise a number of producers. See also explanation on page 56.

Country	Producers[1]	Processors	Importers	Exporters
Côte d'Ivoire	277	8		11 (2012)
Croatia	1'608	61	34	6 (2012)
Cuba	2	6		3
Cyprus (2012)	719	53		
Czech Republic	3'910	471	89	42
Democratic Republic of the Congo (2012)	1'123	4		4
Denmark	2'589	760		
Dominican Republic	24'412	200		
Ecuador	9'245	226		
Egypt (2009)	790			
El Salvador (2007)	2'000			
Estonia	1'553	84		
Ethiopia (2012)	134'626			23
Falkland Islands (Malvinas)	8			8
Faroe Islands				
Fiji	171 (2012)	5		
Finland	4'284	558	72	
France	25'467	9'297	181	
French Guiana (France)	43	4		
French Polynesia	23			
Georgia	150			
Germany	23'271	8'293 (2012)		308 (2012)
Ghana	1'915	20		10
Greece (2012)	23'433	1'551	4	
Grenada (2010)	3			
Guadeloupe (France)	34	5		
Guatemala	3'008 (2010)	23 (2011)		92 (2011)
Guinea-Bissau				
Haiti	1'210			
Honduras	4'989 (2011)	26 (2011)	1 (2009)	25 (2009)
Hungary	1'673	371	15	
Iceland	33	26	2	1
India	650'000		699 (2012)	699 (2012)
Indonesia	5'700	66		
Iran (Islamic Republic of)	1'663	8		33
Ireland	1'263 (2012)	211 (2012)	33 (2012)	1 (2011)
Israel	326	93	24	42
Italy	45'969	10'610	260	
Jamaica (2009)	80			
Japan (2012)	2'130	1'805	193	
Jordan (2012)	98	7		3
Kenya	1'2647 (2011)		1 (2011)	30 (2012)
Kosovo	10	10		8 (2012)
Kyrgyzstan	1'128			
Lao PDR (2011)	1'342			
Latvia	3'473	192	7	2
Lebanon	132	62	11	5
Lesotho	2	2		
Liechtenstein	38			
Lithuania	2'555	108		
Luxembourg	212	43 (2009)	3 (2009)	
Macedonia (FYROM)	382	7	2	6
Madagascar	14'550 (2012)		136 (2011)	135 (2011)
Malawi				
Malaysia	119			

Statistics: Producers and Other Operator Types

Country	Producers[1]	Processors	Importers	Exporters
Mali	8'048	2 (2012)		6 (2012)
Malta (2012)	12	4	2	
Martinique (France)	39	6		
Mauritius	3 (2011)	1 (2009)		1 (2009)
Mayotte	2			
Mexico	169'703	95		
Moldova (2011)	172			
Mongolia				
Montenegro (2010)	62			
Morocco (2010)	120			
Mozambique	5	2		
Myanmar (2012)	15			
Namibia	12	9		6
Nepal	687			
Netherlands (2012)	1'646	1'035		
New Caledonia	50			
New Zealand (2012)	987	274	12	
Nicaragua (2009)	10'060	30		
Niger (2012)				
Nigeria (2011)	80	80		80
Niue (2012)	122			
Norway	2'452	496	72	
Oman	38			
Pakistan (2012)	105	15		
Palestinian, State of (2010)	832			
Panama	1'300	2 (2011)		
Papua New Guinea	17'948			
Paraguay	7'905	14		
Peru	52'284			153 (2010)
Philippines	3'008	20		20 (2012)
Poland (2012)	25'944	312	30	
Portugal	3'308	470	7	
Republic of Korea	13'963			4'334 (2012)
Réunion (France)	144	13		
Romania (2012)	15'315	105	3	
Russian Federation	70	39		
Rwanda (2011)	876			
Samoa	743 (2012)	4 (2010)		
San Marino (2012)		2		
Sao Tome and Principe (2012)	2'180	3		3
Saudi Arabia (2012)	79			
Senegal	18'393	3		6
Serbia	1'281	49	33	23
Singapore		2 (2012)		1 (2010)
Slovakia (2011)	365	41	5	
Slovenia	3'049	193	9	
Solomon Islands (2012)	384			
South Africa	250	172	1 (2010)	49
Spain	30'502	2'842	112	49
Sri Lanka	404 (2012)	75 (2012)		6 (2011)
Sudan	222	2		4 (2012)
Swaziland		2		
Sweden	5'584	762	33	
Switzerland	6'308	847		
Syrian Arab Republic (2010)	2'458			

Country	Producers[1]	Processors	Importers	Exporters
Taiwan	2'988			
Tajikistan (2012)	10'486	15		
Tanzania	148'610			28 (2011)
Thailand	9'279	166		
Timor-Leste (2012)	72	1		
Togo	9'428	11 (2012)		15 (2012)
Tonga	123			
Tunisia	2'810	92	20	60
Turkey	65'042	118	35	39
Uganda (2012)	189'610			
Ukraine	175	59 (2012)	41 (2012)	36 (2012)
United Arab Emirates	50			
United Kingdom	3'918	2'332	95 (2012)	
United States of America (2011)	12'880			
Uruguay (2006)	630			
Uzbekistan (2012)		2		2
Vanuatu	696			
Venezuela (2009)				
Viet Nam	6'929 (2012)	33 (2010)		4 (2012)
Zambia	10'055 (2009)	3		3
Zimbabwe	2'000			1
Total	**1'998'592**	**50'936**	**6'213**	**2'114**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

Market and international trade data

Domestic sales

Whereas Amarjit Sahota presents global trends and a global figure for the organic market along with much background information (page 120), in this chapter we show the country-related data that was compiled under the framework of the global survey on organic agriculture. For Europe, data was collected in the framework of the OrganicDataNetwork project (see also article on the European market on page 181). Data on total domestic sales value were available for more than 50 countries, which means that for many countries with organic farming activities such data is missing.[1]

The countries with the largest market for organic food are the United States (24.3 billion euros), followed by Germany (7.6 billion euros), France (4.4 billion euros) and China (2.4 billion euros) – a country for which, for the first time, official retail sales data became available. The largest single market is the United States followed by the European Union (22.2 billion euros) and China. By region, North America has the lead (26.7 million euros), followed by Europe (24.3 million euros) and Asia.

Market growth was noted in all countries for which 2013 data are available, in some cases double digit; e.g. in the United States, the market grew by elven percent, or in Switzerland, by 12 percent.

The highest per capita consumption is in Europe: In 2013, Switzerland had the highest per capita consumption (210 euros) worldwide, followed by Denmark (163), and Luxembourg (157 euros). For the European countries, the per-capita consumption was adjusted for Purchasing Power Parties, which changes the order of countries: Switzerland has still the lead, but number two is Luxembourg and the gap between Switzerland, with its high costs of living, and the following countries is not so big anymore. For more information, see page 197. Looking at the shares the organic market has of the total market, the leader is Denmark (8 percent), followed by Switzerland (6.9 percent), Austria (6.5 percent), the United States (4.3 percent) and Germany (3.7 percent).

Export data

International trade data are available for more and more countries. These can be expressed as total export/import volumes in tons or as values. Some countries also provide a breakdown by crop and product.

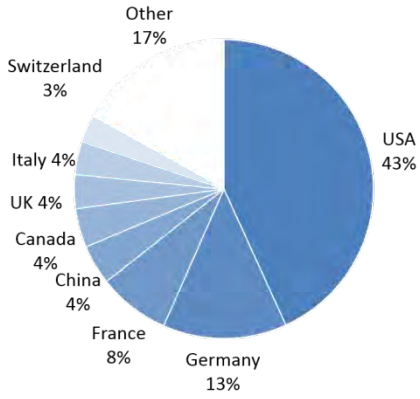
Table 12 shows the values of total exports, where available. More than 40 countries had data on the export values.

It should be noted though that the export values are not strictly comparable due to different data collection methods.

[1] Some countries also provide a breakdown by product, be it in value (euros) or volume (tons), and the European OrganicDataNetwork project has made these data accessible (for Europe) on its website at www.organicdatanetwork.net.

Global market: Distribution of retail sales value by country 2013

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



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

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

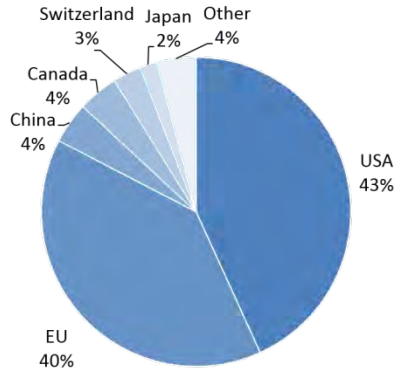


Figure 11: Global market of organic food: Distribution of retail sales by country 2013

Figure 12: Global market of organic food: Distribution of retail sales by single markets 2013

Source: FiBL-AMI-OrganicDataNetwork s survey 2015, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 281.

The ten countries with the largest markets for organic food 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015

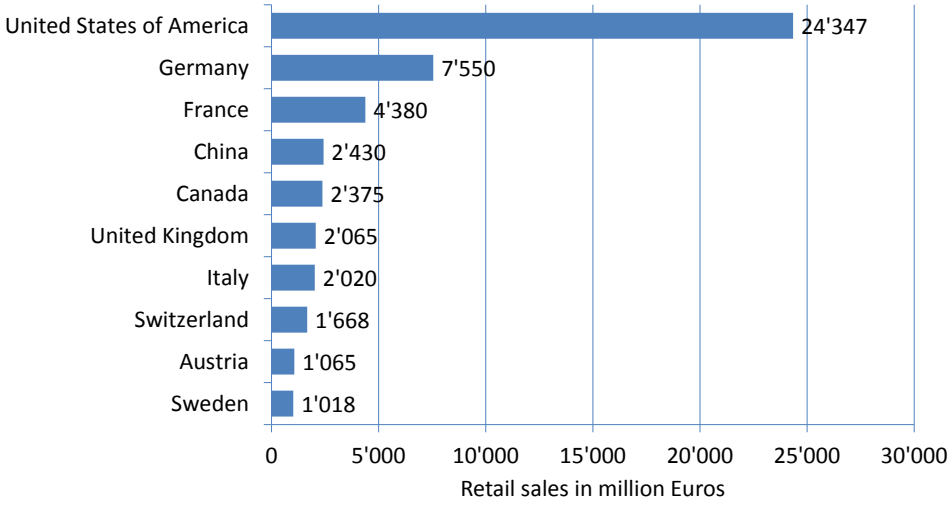


Figure 13: Global market: The countries with the largest markets for organic food 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 281.

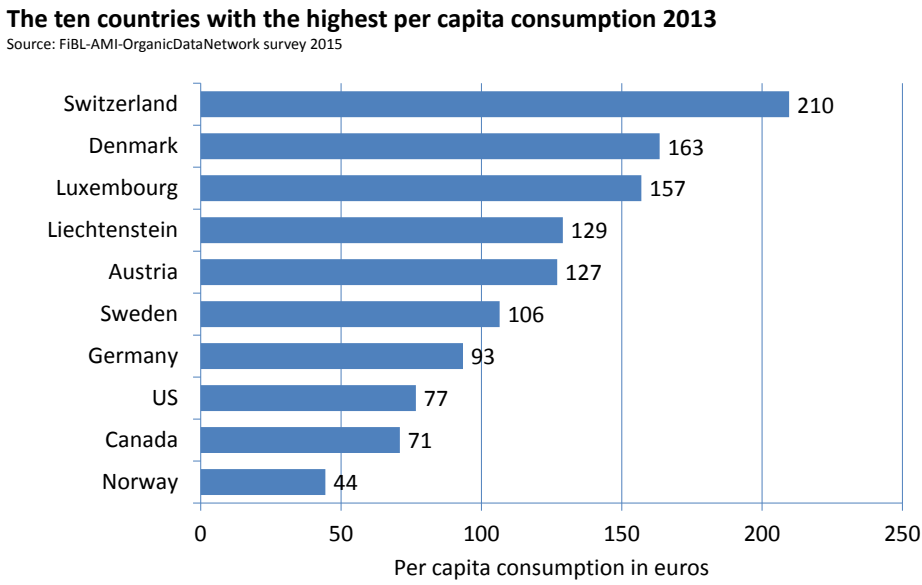


Figure 14: Global market: The countries with the highest per capita consumption 2013

Source: FiBL-AMI-OrganicDataNetwork survey 2015, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 281.

Table 12: Global market data: Domestic sales, per capita consumption, and exports by country 2013

It should be noted that for market and trade data, comparing country statistics remains very problematic, due to differing methods of data collection. Comments on this table should be sent to helga.willer@fibl.org. Revisions will be posted at http://www.organic-world.net/statistics-data-revisions.html and included into the database.

Country	Data year	Retail sales [Mio €]	€/person	Export [Mio €]
Argentina	2009			122
Australia	2013	962	42	248
Austria	2011	1'065	127	80
Azerbaijan	2011	3	0.3	
Belgium	2013	403	36	
Bhutan	2011			
Bolivia	2011			179
Bosnia and Herzegovina	2013	0.3		
Brazil	2013	700	3	
Bulgaria	2010	7	1	
Cambodia	2009			1
Canada	2013	2'375	71	370
Chile	2009	2	0.1	
	2013			134
China	2013	2'430	2	365
Colombia	2007			13
Costa Rica	2008	1	0.3	
	2009			19
Croatia	2011			3
	2012	104	25	
Cyprus	2006	2	2	
Czech Republic	2012	70	7	24
Denmark	2013	917	163	206
Dominican Republic	2013			172

Country	Data year	Retail sales [Mio €]	€/person	Export [Mio €]
Estonia	2013	22	17	
Ethiopia	2010			26
Falkland Islands (Malvinas)	2013			2
Finland	2013	215		
France	2013	4'380		393
Germany	2013	7'550	93	
Greece	2010	60	5	
Hungary	2009	25	2	20
India	2011		0.1	
	2012	130		291
Ireland	2011	99	22	
Italy	2012		31	
	2013	2'020		1'260
Japan	2009	1'000	8	
Kenya	2008	0.3	0.01	
Kosovo	2013			5
Kyrgyzstan	2012			
	2013	0.3		0.2
Latvia	2011	4	2	
Liechtenstein	2012	5	129	
Lithuania	2011	6	2	
Luxembourg	2013	84	157	
Mexico	2013	14	0.1	373
Moldova	2011			15
Montenegro	2010	0.1	0.2	
Netherlands	2012			783
	2013	840		
New Zealand	2012	82	19	136
Norway	2013	224	44	
Paraguay	2011			71
Peru	2010	14	0.5	
	2013			198
Poland	2011	120	3	
Portugal	2011	21	2	
Republic of Korea	2012		9	
Romania	2011	80	4	200
Russian Federation	2009			4
	2012	120	1	
Samoa	2010			0.1
Senegal	2012			1
	2013	1		
Serbia	2013			10
Slovakia	2010	4	1	
Slovenia	2009			0.1
	2013	49	24	
South Africa	2013			
South Korea	2013			
Spain	2012	998	21	590
Sweden	2013	1'018	106	
Switzerland	2013	1'668	210	
Thailand	2009	51	1	51
Tunisia	2013			54
Turkey	2009	4	0.1	20
Uganda	2012			32
Ukraine	2013	12	0.3	36
United Kingdom	2013	2'065	33	
United States of America	2013	24'347	77	400
Viet Nam	2013			195

Source: FiBL-AMI- OrganicDataNetwork survey 2015, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 281.
Blank cells: No data available.

Organic farming in developing countries and in emerging markets

The countries listed on the Development Assistance Committee (DAC) list of recipients for Official Development Assistance (ODA) from the Organization for Economic Cooperation and Development (OECD) are analyzed in this section.[1] More than 1.7 million producers from the DAC countries were counted (85 percent of all organic producers). Almost a quarter of the world's organic agricultural land, 11.7 million hectares, is located in countries listed on the DAC list. If wild collection and beekeeping areas are included, the total area is 35 million hectares. Most of the agricultural land is in Latin American countries (6.2 million hectares), with Asia (3.3 million) and Africa (1.2 million) in second and third place. The countries with the largest areas of organic agricultural land are Argentina, China, Uruguay, Brazil, and India (in that order). Not surprisingly, that most of them are large countries (Figure 15).

However, when it comes to organic agricultural land as a percentage of the total area under agriculture, the order is different. The highest percentages of organic agricultural land are in the Dominican Republic, some Pacific Islands countries, and Sao Tome and Principe. Argentina, with by far the largest area under organic management (with 3.2 million hectares), is ranked ninth when organic agricultural area is expressed as a proportion of the total agricultural area. In the top ten countries on the DAC list, the shares of organic land are comparable to those in many European countries. These high shares can probably be attributed in part to a high potential for, and focus on, exports. Support activities may also play a role. However, out of all countries on the DAC list that was covered in the survey, only a 20 percent have a proportion of organic agricultural land that is higher than one percent of the total agricultural area (Figure 16).

Land use details were available for more than 70 percent of the agricultural land; crop data are missing for some of the world's largest producing countries (India and Brazil). However, the available statistics show that the shares of grassland/grazing areas and of permanent crops are relatively high when compared with other regions. Arable land, by contrast, is of minor importance. This is because exports play an important role, either for meat products (mainly from Latin America) or for permanent crops. The most important permanent crops are export crops, such as coffee, cocoa, and sugarcane from Latin America and olives from the Mediterranean countries.

Table 13: Countries on the DAC list: Development of organic agricultural land 2008-2013

Region	2008 [ha]	2009 [ha]	2010 [ha]	2011 [ha]	2012 [ha]	2013 [ha]
Africa	855'400	1'026'431	1'075'521	1'072'848	1'148'867	1'226'488
Asia	3'297'940	3'500'058	2'689'884	3'629'209	3'150'217	3'337'066
Europe	401'837	648'457	734'337	771'542	841'687	892'408
Latin America	6'821'159	7'261'483	7'142'809	6'452'213	6'407'557	6'205'212
Oceania	22'623	25'918	17'117	50'691	53'370	62'511
Total	**11'398'959**	**12'462'346**	**11'659'669**	**11'976'502**	**11'601'698**	**11'723'686**

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

[1] The list is available at
http://www.oecd.org/document/45/0,3746,en_2649_34447_2093101_1_1_1_1,00.html

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

Source: FiBL-IFOAM survey 2015

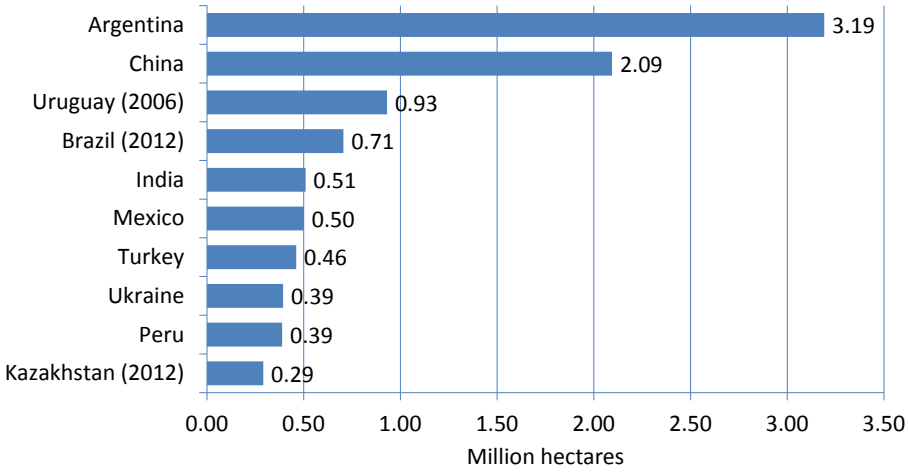


Figure 15: Countries on the DAC list: The countries with the largest areas of organic agricultural land in 2013

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

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

Source: FiBL-IFOAM survey 2015

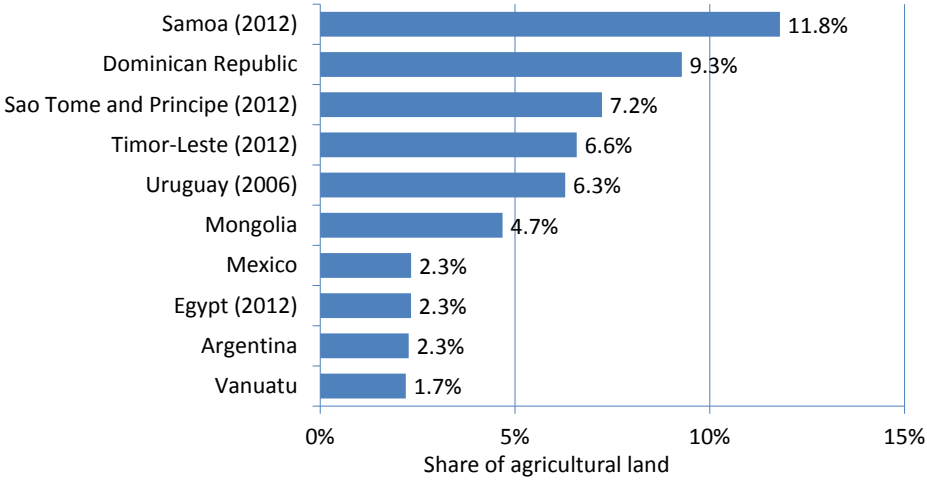


Figure 16: Countries on the DAC list: The ten countries with the highest shares of organic agricultural land in 2013

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

Land use and crop data

Almost two-thirds of the 43.1 million hectares of organic agricultural land in 2013 was grassland/grazing areas (27 million hectares). The cropland area (arable land with 7.7 million hectares and permanent crops with 3.2 million hectares) constituted 10.9 million hectares, and thus more than a quarter of the organic agricultural land. The cropland area is probably much higher because details on land use are not available for some countries with large organic agricultural areas, for example, India. General land use information was available for almost 90 percent of the organic agricultural land, which does not however mean that detailed crop information is available for all areas as not all countries provided detailed crop data.[1]

The FAO classification[2] of land use was utilized for this survey, with slight modifications. A system similar to that of Eurostat was used for the classification of crops.[3] The following main levels were used to classify the land use data: arable land; permanent crops; cropland for which no further details were available (cropland = arable land + permanent cropland with no details available); permanent grassland/grazing areas; other agricultural areas (such as for instance hedges); and agricultural land for which no details were available at all. For crop groups included in these land use type see Table 15. Aquaculture, forest, and grazed non-agricultural land were distinguished from "agricultural land" with a separate category, as were organic wild collection areas.

The land use information can be summarized by geographical region, as follows:

- Africa: Land use information was available for about two-thirds of the organic agricultural land in Africa. Almost half of the agricultural land is used for permanent crops. The main permanent crops are cash crops such as coffee and olives. For land use details in Africa, see page 145.
- Asia: Land use details are known for more than fifty percent of the organic agricultural land in Asia. Arable land is mainly used for cereals, including rice. Furthermore, oilseeds are important. For land use details in Asia, see page 166.
- Europe: In Europe, the agricultural land use is well known, and the main crop categories are well documented. Permanent pastures and arable land have approximately equal shares of the organic agricultural area. Arable land is mainly used for the cultivation of green fodder (almost 2 million hectares) followed by cereals (1.8 million hectares). Permanent crops account for eleven percent of organic agricultural land. More than one-third of this land was used for olives, followed by grapes, nuts, and fruits. For land use details in Europe, see page 190.
- Latin America and the Caribbean: Most of the organic agricultural land in Latin America for which information was available is permanent pasture. Permanent crops account for about one tenth of the agricultural area. More than half of the permanent cropland is used for coffee, followed by cocoa and tropical fruits. For land use details in Latin America and the Caribbean, see page 233.

[1] For some countries, only information on the main uses (arable crops, permanent crops, and permanent grassland) was available. For other countries, very detailed statistical land use information can be found. The Eurostat statistics, for instance, list each vegetable type for many countries.

[2] For more details, see the FAOSTAT homepage, faostat.fao.org at Home > Concepts and Definitions > Glossary, or http://faostat.fao.org/site/379/DesktopDefault.aspx?PageID=379

[3] For details, see www.organic-world.net. For the data collected, a classification system developed in cooperation with AMI, the German Agricultural Market Information Company, is used. The questionnaire, as well as some background information, is also available at www.organic-world.net.

– North America: As in Europe, arable land and permanent grassland/grazing areas have almost equal shares. A major proportion of the arable land is used for cereal production and cultivation of green fodder. For land use details in North America, see page 249.
– Oceania: Most of the land in Australia is used for extensive grassland/grazing areas, and only little information is available on the remaining land. For land use details in Oceania, see page 265.

Table 14: World: Land use in organic agriculture by region (including in-conversion areas) 2013

Land use	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	World [ha]
Agricultural land, no details	340'301	607'773	226'394	721'672		435'731	2'328'106
Arable crops	237'219	1'253'249	4'599'369	209'335	1'321'654	38'679	7'659'506
Cropland, no details	8'002	1'086'194	72'187	484'955	388'912	48'351	2'088'601
Other agr. land	9'518	62'970	437'939	7'552	219'957		737'936
Permanent crops	567'634	388'077	1'296'073	845'020	67'089	70'950	3'234'842
Permanent grassland	64'415	27'676	4'828'810	4'343'102	1'050'097	16'728'022	27'042'122
Total	1'227'088	3'425'939	11'460'773	6'611'636	3'047'710	17'321'733	43'091'113

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Totals include correction values for some countries for land with double cropping during one year.

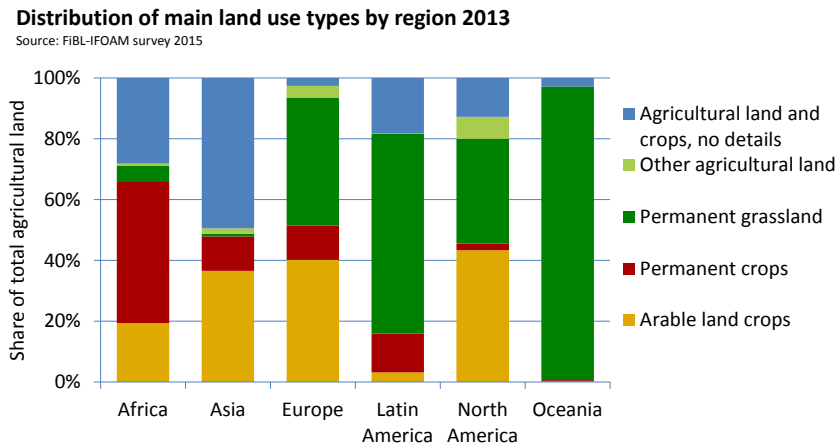


Figure 17: World: Distribution of main land use types by region 2013

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

Distribution of main land use types and crop categories 2013

Source: FiBL-IFOAM Survey 2015; based on information from the private sector, certifiers, and governments.

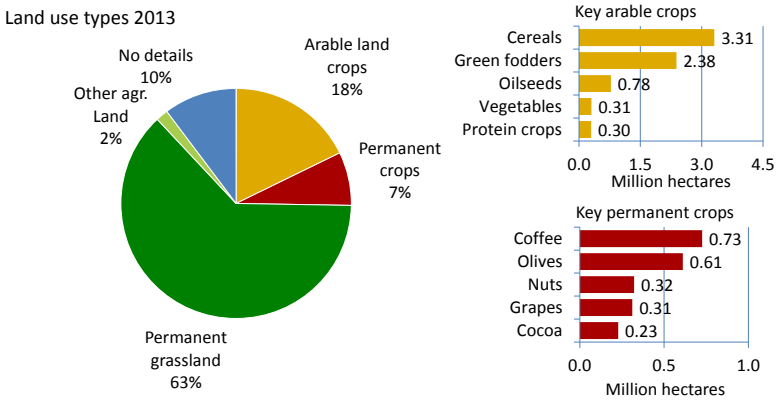


Figure 18: World: Distribution of main land use types and crop categories 2013

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

Development of the organic land by land use type 2004-2013

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

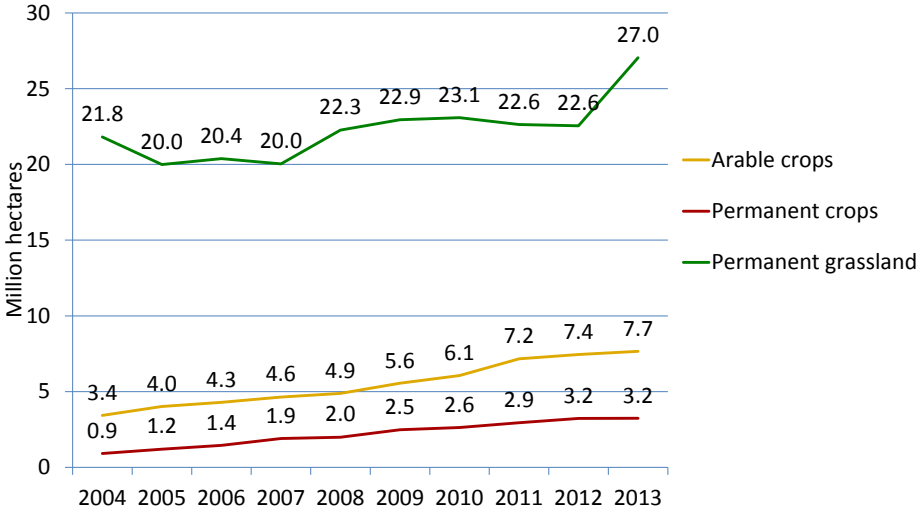


Figure 19: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2013

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

Table 15: World: Land use and crop categories in organic agriculture worldwide 2013

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		2'348'071
Arable crops	Arable crops, no details	196'089
	Cereals	3'309'788
	Flowers and ornamental plants	9'877
	Green fodder from arable land	2'381'943
	Hops	188
	Industrial crops	21'876
	Medicinal and aromatic plants	86'624
	Mushrooms and truffles	1'518
	Oilseeds	779'803
	Protein crops	296'073
	Root crops	50'628
	Seeds and seedlings	4'802
	Strawberries	3'638
	Sugarcane	42'328
	Textile crops	89'748
	Tobacco	1'690
	Vegetables	305'342
	Arable crops, other	77'550
Arable crops total		*7'659'506*
Cropland, no details		2'068'636
Other agricultural land	Fallow land, crop rotation	558'620
	Hedges	618
	Home gardens	839
	Other agricultural land, no details	51'738
	Pathways	8
	Unutilized land	126'113
Other agricultural land total		*737'936*
Permanent crops	Berries	42'688
	Citrus fruit	81'577
	Cocoa	227'695
	Coconut	58'656
	Coffee	725'627
	Flowers and ornamental plants, permanent	22
	Fruit, no details	3'869
	Fruit, temperate	213'023
	Fruit, tropical and subtropical	209'240
	Grapes	311'595
	Medicinal and aromatic plants, permanent	35'001
	Nurseries	752
	Nuts	322'074
	Olives	611'452
	Tea/mate, etc.	71'054
	Permanent crops, other	320'518
Permanent crops total		*3'234'842*
Permanent grassland		27'042'122
Total		**43'091'113**

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

Arable land

With a total of almost 7.7 million hectares, organic arable land constitutes 18 percent of the world's organic agricultural land. An increase of 2.9 percent over 2012 was reported, and there was an increase in almost all crop categories. Almost two-thirds of the arable land is located in Europe, followed by North America (17 percent), Asia (15 percent) (see Figure 20).

Most of this category of land is used for cereals including rice (3.3 million hectares), followed by green fodder (2.4 million hectares) and oilseeds (0.8 million hectares). It should be noted that the increase for some of the crop groups (in particular cereals, oilseeds and vegetables) is due to the fact that for China more detailed data on land use has become available.

Table 16: Use of organic arable land (including in-conversion areas), 2012 and 2013 compared

Crop group	2012 [ha]	2013 [ha]	Change in hectares	Change in %
Cereals	2'663'948	3'309'788	+645'841	+24.2%
Flowers and ornamental plants	9'631	9'877	+246	+2.6%
Green fodder from arable land	2'314'828	2'381'943	+67'115	+2.9%
Hops	198	188	-10	-5.0%
Industrial crops	18'194	21'876	+3'682	+20.2%
Medicinal and aromatic plants	70'998	86'624	+15'625	+22.0%
Mushrooms and truffles	1'037	1'518	+481	+46.4%
Oilseeds	640'320	779'803	+139'483	+21.8%
Protein crops	317'446	296'073	-21'373	-6.7%
Root crops	54'945	50'628	-4'317	-7.9%
Seeds and seedlings	3'808	4'802	+994	+26.1%
Strawberries	3'268	3'638	+371	+11.3%
Sugarcane	38'314	42'328	+4'014	+10.5%
Textile crops	86'969	89'748	+2'779	+3.2%
Tobacco	1'026	1'690	+664	+64.7%
Vegetables	244'558	305'342	+60'785	+24.9%
Total*	**7'444'115**	**7'659'506**	**+215'390**	**+2.9%**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Not all countries included in the survey provided data on land use or crop areas.
*Total includes arable crop groups for which no further details were available.

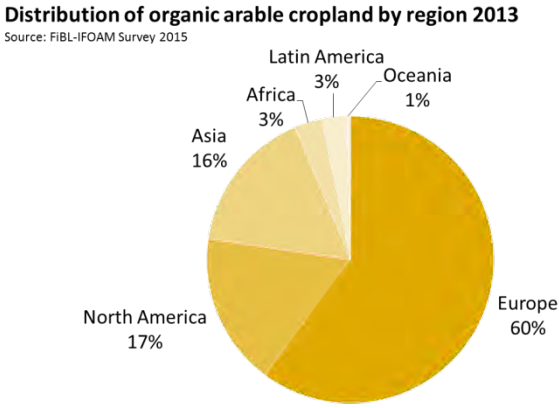


Figure 20: World: Distribution of organic arable cropland by region 2013

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

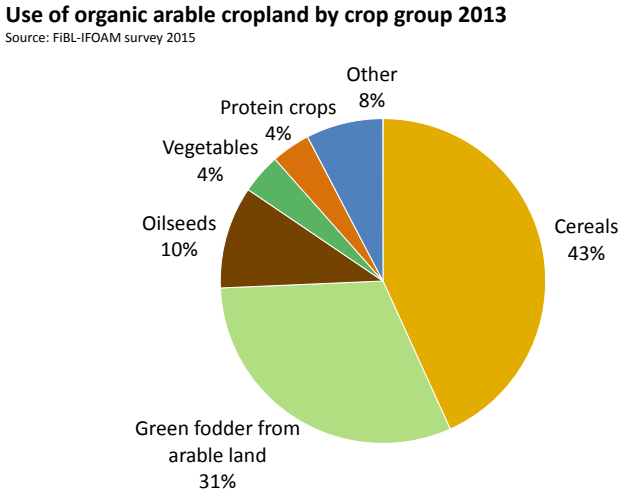


Figure 21: World: Use of arable cropland by crop group 2013

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

Permanent crops

Permanent crops account for more than 3.2 million hectares, which is almost 2 percent of the world's permanent cropland.[1] Compared with the previous survey, an increase of almost 2'500 hectares was reported. With seven percent, permanent cropland has a higher share in organic agriculture than in total agriculture, where permanent crops account for approximately three percent of the total. Most of the permanent cropland is in Europe (1.3 million hectares), followed by Latin America (0.8 million hectares), and Africa (0.6 million hectares) (see Table 14). The most important crops are coffee, with more than 0.7 million hectares reported and constituting almost one quarter of the organic permanent cropland, followed by olives (0.6 million hectares), nuts (0.32 million hectares), grapes (0.31 million hectares), and cocoa (0.2 million hectares).

Table 17: Use of organic permanent cropland (including in-conversion areas), 2012 and 2013 compared

Crop group	2012 [ha]	2013 [ha]	Change inn hectares	Change in %
Berries	42'618	42'688	+69	+0.2%
Citrus fruit	65'838	81'577	+15'739	+23.9%
Cocoa	205'419	227'695	+22'277	+10.8%
Coconut	58'122	58'656	+533	+0.9%
Coffee	695'959	725'627	+29'668	+4.3%
Flowers and ornamental plants, permanent	57	22	-35	-61.7%
Fruit, temperate	163'969	213'023	+49'055	+29.9%
Fruit, tropical and subtropical	218'135	209'240	-8'895	-4.1%
Grapes	284'155	311'595	+27'439	+9.7%
Medicinal and aromatic plants, permanent	39'821	35'001	-4'820	-12.1%
Nurseries	95	752	+657	+691.8%
Nuts	271'323	322'074	+50'751	+18.7%
Olives	576'041	611'452	+35'412	+6.1%
Tea/mate, etc.	97'736	71'054	-26'682	-27.3%
Total*	**3'232'345**	**3'234'842**	**+2'497**	**+0.1%**

Source: FiBL-IFOAM-survey 2015, based on data from governments, the private sector, and certifiers. For detailed data sources see annex, page 281.
Blank cells: No data available. Not all countries included in the survey provided data on land use or crop areas.
*Total includes arable crop groups for which no further details were available.

[1] There were 163'893'470 hectares of permanent cropland in 2012 according to FAOSTAT, FAO, Rome. See the FAO Homepage: faostat.fao.org > Resources > Resourcestat > Land at http://faostat.fao.org/site/377/DesktopDefault.aspx?PageID=377#ancor

Distribution of organic permanent cropland by region 2013
Source: FiBL-IFOAM Survey 2015

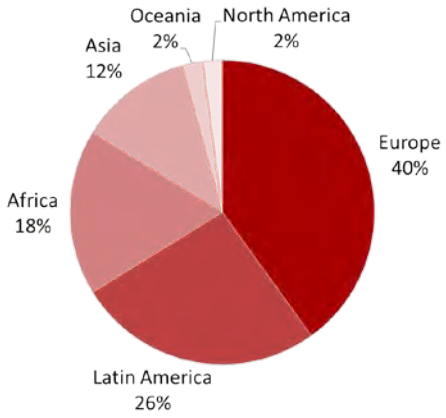


Figure 22: World: Distribution of permanent cropland by region 2013

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

Use of permanent cropland by crop group 2013
Source: FiBL-IFOAM Survey 2015

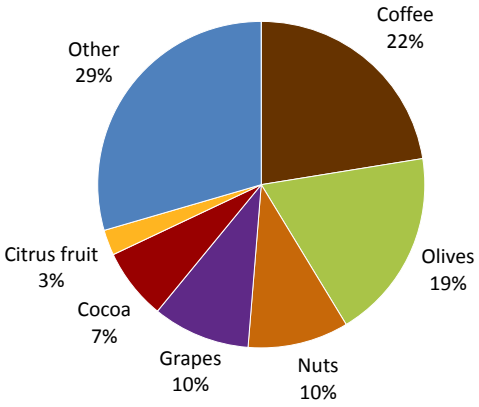


Figure 23: World: Use of permanent cropland by crop group 2012

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

Wild collection and beekeeping areas

The collection of wild harvested crops is defined in the IFOAM Norms (IFOAM 2014), and wild collection activities are also regulated by organic laws. A collection area (including beekeeping) of 34.1 million hectares was reported in 2013. The organic wild collection areas are concentrated in Europe, Africa, Asia, and Latin America (Figure 24); the distribution is thus quite different from that of the organic agricultural land.

The countries with the largest areas are Finland (mainly berries), followed by Zambia (beekeeping) and India (Figure 25).

Wild berries, apiculture, medicinal and aromatic plants, as well as shea nuts in Africa and Brazil nuts in Latin America, play the most important roles (see Table 19).

Table 18: Wild collection and beekeeping areas by region 2013

Region	2012 [ha]	2013 [ha]	Change in hectares	Change in %
Africa	9'873'768	10'118'473	+244'705	+2.5
Asia	6'864'134	7'794'340	+930'206	+13.6
Europe	10'695'304	13'357'745	+2'662'441	+24.9
Latin America	2'875'166	2'749'717	-125'450	-4.4
North America	49'871	71'821	+21'950	+44.0
Oceania	765	765		
Total	**30'359'009**	**34'092'861**	**+3'733'852**	**+12.3**

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

Table 19: Wild collection and beekeeping areas by crop group 2013

Land use	Are [ha]
Apiculture	6'697'166
Berries, wild	9'001'046
Forest honey	119'137
Fruit, wild	25'260
Medicinal and aromatic plants, wild	1'814'825
Mushrooms, wild	3'902
Nuts, wild	942'841
Oil plants, wild	685'494
Palm sugar	100
Palmito, wild	6'800
Rose hips, wild	43'860
Seaweed	200'032
Wild collection, no details	14'394'580
Wild collection, other	157'818
Total	**34'092'861**

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

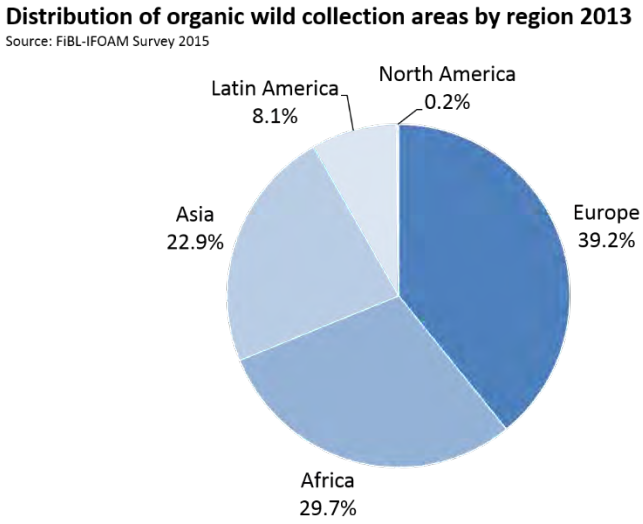


Figure 24: World: Distribution of organic wild collection and beekeeping areas by region in 2013

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

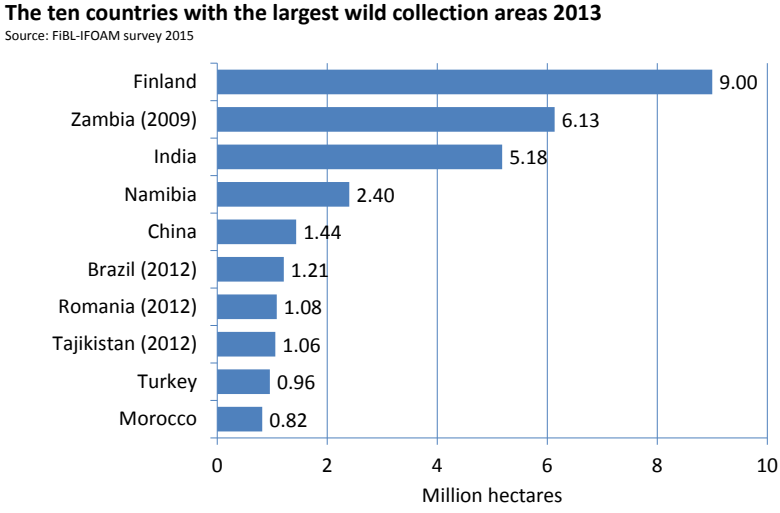


Figure 25: World: The ten countries with the largest organic wild collection and beekeeping areas in 2013

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

Table 20: Wild collection and beekeeping areas by country 2012

Country	Land use	Area [ha]
Albania	Wild collection, no details	330'677
Argentina	Apiculture	454'229
	Wild collection, no details	4'372
Armenia	Wild collection, no details	11'250
Azerbaijan	Berries, wild	161
	Fruit, wild	541
	Medicinal and aromatic plants, wild	56
	Nuts, wild	179
Belarus	Berries, wild	100
	Mushrooms, wild	2'642
Belgium	Wild collection, no details	3
Benin	Nuts, wild	3'543
Bhutan	Wild collection, no details	15'605
Bolivia	Nuts, wild	785'453
Bosnia and Herzegovina	Wild collection, no details	63'910
Brazil	Wild collection, no details	1'209'773
Bulgaria	Rose hips, wild	1'588
	Wild collection, no details	678'025
	Wild collection, other	232
Burkina Faso	Nuts, wild	65'631
	Oil plants, wild	14'008
	Wild collection, no details	69
	Wild collection, other	310
Cameroon	Forest honey	110'000
Canada	Wild collection, no details	1'294
	Wild collection, other	70'527
Chad	Wild collection, other	11'000
Chile	Berries, wild	634
	Fruit, wild	18'434
	Rose hips, wild	42'272
	Wild collection, no details	410
China	Wild collection, no details	1'435'000
Colombia	Palmito, wild	6'800
	Wild collection, other	520
Comoros	Medicinal and aromatic plants, wild	29
	Wild collection, no details	41
Côte d'Ivoire	Nuts, wild	344
Croatia	Wild collection, no details	7
Denmark	Wild collection, no details	2'648
Dominican Republic	Apiculture	130
	Forest honey	130
	Wild collection, no details	5'000
Ecuador	Mushrooms, wild	1'260
Estonia	Wild collection, no details	40'579
Ethiopia	Apiculture	180
Fiji	Wild collection, other	653
Finland	Berries, wild	9'000'000
France	Wild collection, no details	2'809
Georgia	Apiculture	12
	Wild collection, no details	1'393
Ghana	Nuts, wild	19'813
Guatemala	Apiculture	5
Guyana	Wild collection, no details	58'000
Iceland	Seaweed	200'032
	Wild collection, no details	12'731
India	Wild collection, no details	5'180'000
Indonesia	Forest honey	9'007
	Palm sugar	100

Country	Land use	Area [ha]
	Wild collection, other	1'222
Iran (Islamic Republic of)	Apiculture	7'850
	Wild collection, no details	19'702
Italy	Wild collection, no details	62'647
Kazakhstan	Medicinal and aromatic plants, wild	863
Kenya	Apiculture	89'417
	Oil plants, wild	41'486
Lao People's Democratic Republic	Wild collection, no details	16'786
Lesotho	Wild collection, no details	50'000
Macedonia (FYROM)	Wild collection, no details	198'000
Madagascar	Fruit, wild	141
	Medicinal and aromatic plants, wild	20'152
	Nuts, wild	3'364
	Wild collection, no details	13
	Wild collection, other	41
Mali	Nuts, wild	3'978
Mexico	Apiculture	7'455
	Fruit, wild	6'032
	Medicinal and aromatic plants, wild	60
	Wild collection, no details	3'687
	Wild collection, other	13'130
Montenegro	Medicinal and aromatic plants, wild	139'809
Morocco	Berries, wild	150
	Medicinal and aromatic plants, wild	186'000
	Oil plants, wild	630'000
	Wild collection, other	1'540
Mozambique	Wild collection, other	31'400
Namibia	Medicinal and aromatic plants, wild	1'436'079
	Wild collection, no details	963'921
Nepal	Wild collection, no details	24'422
Nicaragua	Apiculture	11'463
Niue	Fruit, wild	112
Peru	Nuts, wild	60'536
	Wild collection, no details	59'932
Romania	Wild collection, no details	1'082'138
Russian Federation	Wild collection, no details	13'723
Rwanda	Medicinal and aromatic plants, wild	68
	Wild collection, no details	12
Senegal	Wild collection, other	22'000
South Africa	Medicinal and aromatic plants, wild	31'709
Spain	Wild collection, no details	38'184
Sudan	Wild collection, other	5'000
Syrian Arab Republic	Wild collection, no details	8'000
Tajikistan	Wild collection, no details	1'055'890
Tanzania	Wild collection, no details	15'040
Togo	Wild collection, other	242
Turkey	Wild collection, no details	957'260
	Wild collection, other	1
Uganda	Wild collection, no details	158'328
Ukraine	Wild collection, no details	530'000
Uzbekistan	Wild collection, no details	5'000
Viet Nam	Wild collection, no details	1'300
Zambia	Apiculture	6'126'424
	Wild collection, no details	7'000
Zimbabwe	Wild collection, no details	70'000
Total		**34'092'861**

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

Beehives

Almost 1.1 million organic beehives were reported in 2013, which represent 1.4 percent of the world's total global beehives, according to FAO data from 2012.[1] Organic beehives are concentrated mainly in Europe (59 percent) and Africa (22 percent) (see Figure 26). The countries with the largest numbers of organic beehives are Zambia (191'434), followed by Italy (140'004) and Bulgaria (117'360) (Figure 28). Their number has more than doubled since 2007, when 527'000 beehives were reported (Figure 27).

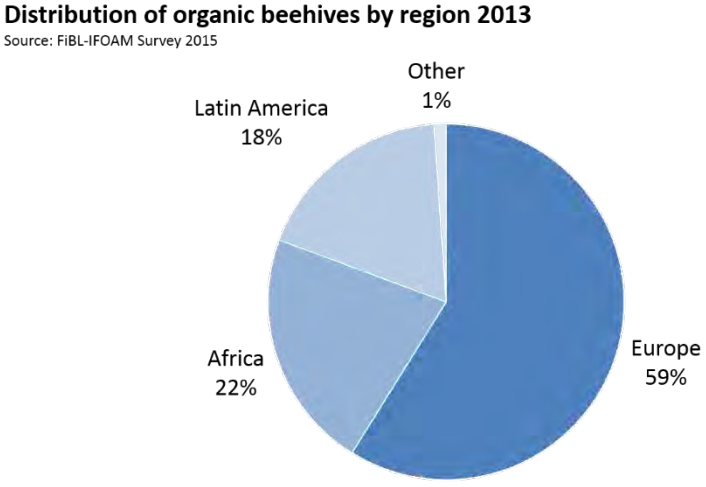


Figure 26: World: Distribution of organic beehives by region in 2013

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

[1] According to FAO, there were 81'027'785 beehives in 2012. The FAOSTAT website > Production > Live animals at http://faostat.fao.org/site/573/DesktopDefault.aspx?PageID=573#ancor

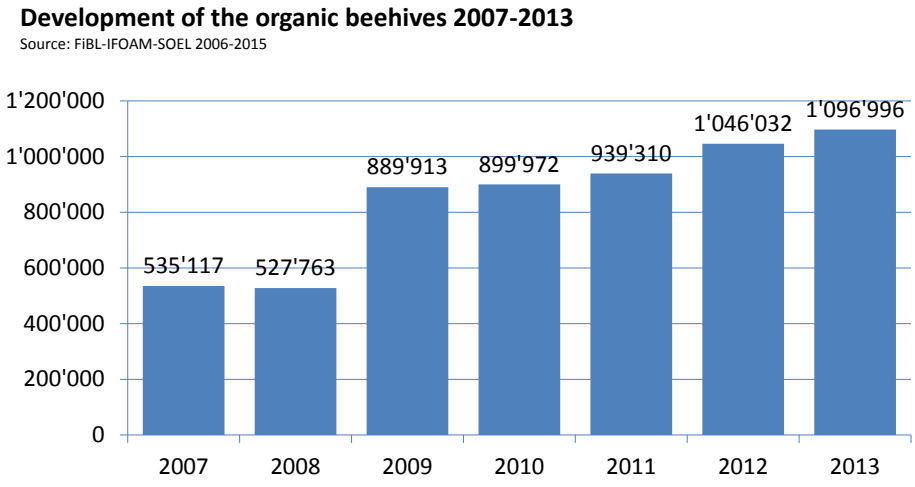


Figure 27: Development of the organic beehives 2007-2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015. For detailed data sources see annex, page 281.

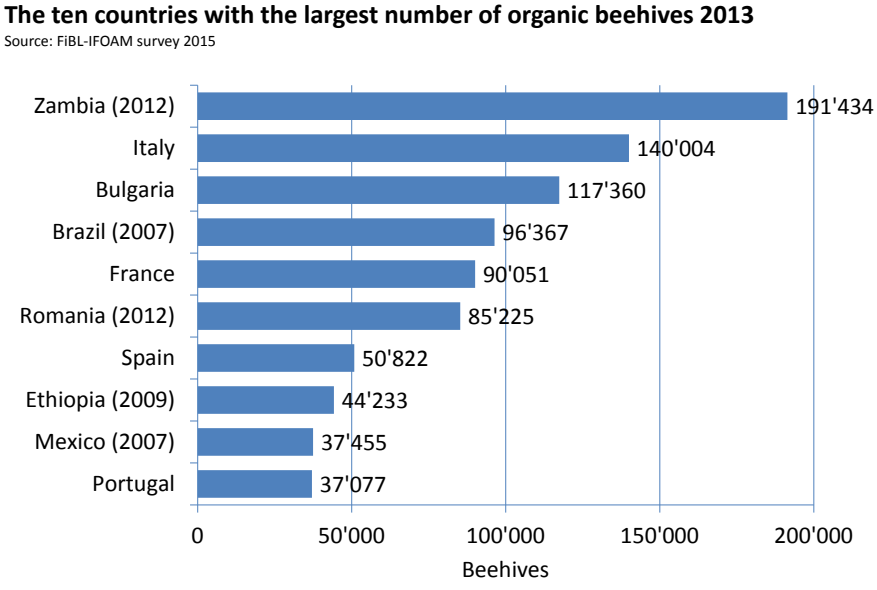


Figure 28: The ten countries with the largest number of organic beehives in 2013

Source: FiBL-IFOAM- survey-2015. For detailed data sources see annex, page 281.

Table 21: Number of beehives by country 2013

Country	Beehives [no]
Argentina	23'299
Armenia	580
Australia	6'475
Austria	19'503
Azerbaijan	932
Belgium	200
Bosnia and Herzegovina	329
Brazil	96'367
Bulgaria	117'360
Burkina Faso	11
Canada	85
Chile	5'414
Croatia	2'678
Cuba	24'100
Czech Republic	703
Estonia	1'510
Ethiopia	44'233
Finland	3'030
France	90'051
French Guiana (France)	21
Georgia	570
Greece	14'865
Guadeloupe (France)	36
Hungary	19'296
Iran	1'500
Ireland	58
Italy	140'004
Kosovo	40
Latvia	16'701
Lebanon	474
Liechtenstein	1
Lithuania	804
Luxembourg	512
Martinique (France)	120
Mexico	37'455
Montenegro	159
Morocco	2'200
Nicaragua	13'367
Norway	1'395
Poland	1'989
Portugal	37'077
Réunion (France)	300
Romania	85'225
Saudi Arabia	1'354
Senegal	32
Serbia	1'940
Slovakia	448
Slovenia	1'803
South Africa	4
Spain	50'822
Sweden	2'182
Switzerland	2'549
Tunisia	757
Turkey	32'342
Ukraine	300
Zambia	191'434
Total	**1'096'996**

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

Statistics on selected crops

In this section, some of the data received on key crops and crop groups are presented: area under organic management, including conversion areas, and comparison with the total area of the crops (if available). FiBL collected land use and crop data for the first time in 2004; hence, the development graphs show the growth since that year.

It should be noted that the organic areas are compared with the *area harvested* in 2012 as provided by FAO. The data may not necessarily be directly comparable to the areas sown or planted as registered by the certification bodies, and may differ from which crops were harvested, due to natural catastrophes for instance.

In some cases, the area data may refer to mixed cropping areas or to agroforestry areas in the case of tropical fruit, where the provided crop surfaces are the total surface of the agroforestry system, including shade trees and other crops. This should be kept in mind when comparing the organic crop area to the overall area for a certain crop; particularly in the case of tropical crops.

Data on conversion status: For some countries, data were collated from several certifiers, some of which provided information on the conversion status while others did not. Therefore, the sum of land under conversion and the fully converted land is not necessarily the same as the total land under organic agricultural management.

The tables presented here are an example of the information available, including other crops, in the FiBL database, which is available at www.organic-world.net. At this website, slides on key crops with more graphs than shown here are available.

Table 22: Selected key crops in organic agriculture 2013 (overview): Land under organic management (including conversion areas)

Crops	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	6'531	793'568	1'844'578	37'738	624'649	2'724	**3'309'788**
Citrus fruit	9'283	11'891	37'347	15'048	7'528	480	**81'577**
Cocoa	23'063			204'601		31	**227'695**
Coffee	194'544	67'598		445'178		18'308	**725'627**
Fruit, temperate	8'314	39'922	138'566	5'617	19'321	1'282	**213'023**
Fruit, tropical and subtropical	19'899	39'894	24'494	117'782	6'717	455	**209'240**
Grapes	925	21'482	258'348	12'064	15'994	2'782	**311'595**
Oilseeds	125'861	325'126	190'419	34'523	103'657	217	**779'803**
Olives	125'350	2'203	478'445	4'985		470	**611'452**
Protein crops	2'020	18'725	226'947	611	47'753	18	**296'073**
Vegetables	5'986	66'899	105'123	62'732	63'214	1'388	**305'342**

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

› Cereals

Table 23 shows that at least 3.3 million hectares of cereals were under organic management in 2013. Comparing the organic figure with FAO's figure for the world's harvested cereal area of 697 million hectares in 2012 (FAOSTAT),[1] 0.5 percent of the total cereal area is under organic management.

Cereals include wheat, spelt, barley, oats, grain maize, rye, and triticale (see Figure 30).

The key cereal producers worldwide, according to FAO, are India (97.1 million hectares), China (93 million hectares), the United States (60.2 million hectares), and the Russian Federation (36.9 million hectares).

Of these four countries, information on the organic cereal area was available for all except India. China (almost 600'000 hectares) and the United States (almost 330'000 hectares) are the largest organic cereal producers. In China, 0.3 percent of the total cereal area was organic, and in the United States, the organic cereal area represented 0.5 percent of the total cereal area. The United States was followed by Canada (296'175 hectares) and Germany (more than 200'000 hectares). In Italy, one of the biggest organic cereal producers (191'400 hectares), 5.4 percent of the total cereal area is organic.

Some countries reach proportions that are far higher than the global organic cereal share of 0.4 percent. For example, Austria (12 percent), Sweden (9.2 percent), Estonia (almost 8 percent), and Lithuania (6.5 percent) greatly exceed the global 0.5 percent.

As some of the world's large cereal producers (such as India, and the Russian Federation) did provide only little or no land use and crop details, it can be assumed that the cereal area is larger than what is shown here.

The organic cereal area has more than doubled since 2004 (1.2 million hectares), and in 2013, it increased by 654'000 hectares or 24 percent, mainly due to better land use data received from China.

The available data on the conversion status indicate that at least 17.5 percent of the organic cereal area was in-conversion in 2013 (more than half a million hectares). Thus, there could be a considerable increase in supply of organic cereals in the near future.

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT homepage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

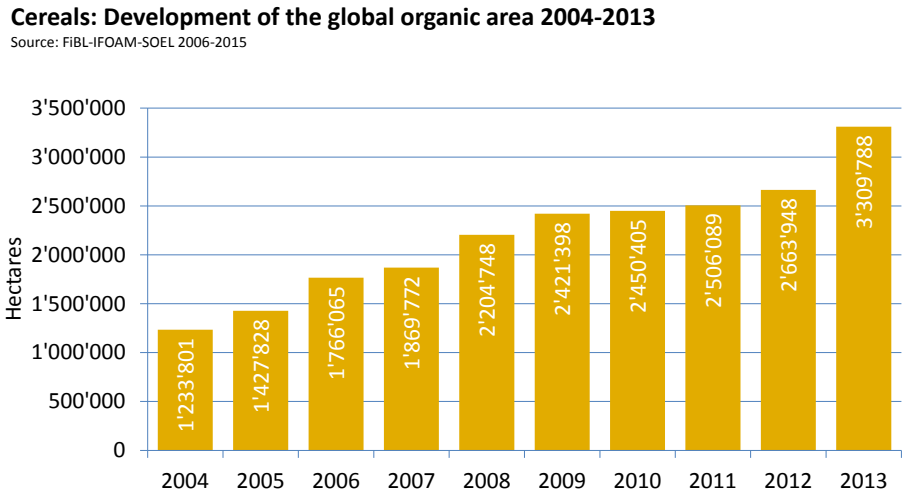


Figure 29: Cereals: Development of the global organic area 2004-2013
Source: FiBL-IFOAM-SOEL 2006-2015

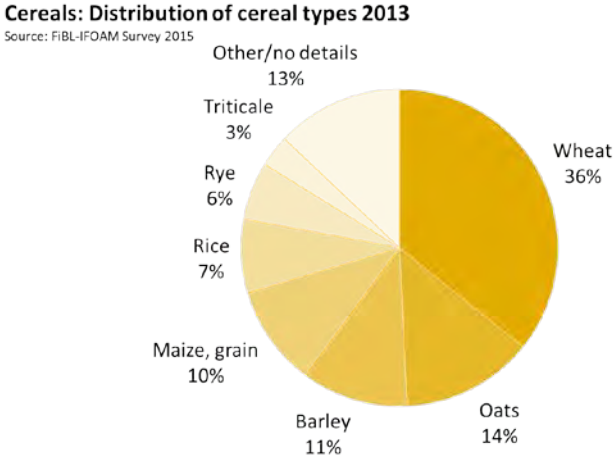


Figure 30: Cereals: Distribution of cereal types 2013
Source: FiBL-IFOAM survey 2015

Table 23: Organic cereal area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	21'639	0.2%		
Australia	2'724	0.0%		
Austria	100'727	12.1%		
Azerbaijan	1'598	0.2%		1'598
Bangladesh	101	0.0%		
Belgium	6'940	2.0%	5'319	1'622
Bhutan	3'024	5.3%		3'024
Bolivia	904	0.1%	435	469
Bosnia and Herzegovina	191	0.1%	187	4
Bulgaria	7'669	0.4%	2'629	5'040
Burkina Faso	23	0.001%		
Cambodia	2'964	0.1%	2938	26
Canada	296'175	2.1%	296'175	
Chile	129	0.0%		
China	588'411	0.6%	348'772	239'639
Colombia	100	0.0%	98	2
Costa Rica	55	0.1%		
Croatia	7'293	1.2%	3'705	3'588
Cyprus	752	1.9%	727	25
Czech Republic	25'884	1.8%	23'358	2'526
Denmark	55'646	3.7%	50'966	4'680
Dominican Republic	350	0.2%		
Ecuador	995	0.1%	987	8
Estonia	23'090	7.8%	20'810	2'280
Finland	44'999	4.3%	44'999	
France	134'328	1.4%	116'215	18'114
Georgia	35	0.0%	4	31
Germany	202'000	3.1%		
Greece	42'651	4.3%	22'436	20'216
Hungary	29'506	1.1%	24'026	5480
Indonesia	1'545	0.01%	1'488	55
Iran	6	0.0001%		6
Israel	1'326	1.6%	1'326	
Italy	191'400	5.4%	151'880	39'520
Japan	3'098	0.2%	3'098	
Jordan	125	0.2%		
Kazakhstan	130'882	0.8%	101'210	25'000
Kyrgyzstan	695	0.1%	437	258
Lao PDR	1'030	0.1%		
Latvia	28'000	5.0%		
Liechtenstein	161	-	161	
Lithuania	75'698	6.5%	65'119	10'579
Luxembourg	714	2.6%	714	
Macedonia (FYROM)	1'550	1.0%	781	769
Madagascar	89	0.005%		
Malta	0	0.002%	0	
Mexico	4'267	0.04%	4'267	
Moldova	8'399	-		
Mongolia	6'461	2.1%		
Morocco	588	0.01%	488	100
Mozambique	37	0.001%	37	
Myanmar	60	0.001%	60	
Namibia	120	0.04%	120	

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Netherlands	4'112	2.0%	3'586	489
Nigeria	6	0.00003%		
Norway	7'549	2.6%	6'780	769
Pakistan	9'633	0.1%		
Peru	6'499	0.5%	8	
Philippines	554	0.0%	508	
Poland	122'818	1.6%	79'609	43'209
Republic of Korea	9'177	1.0%		
Romania	105'148	1.9%	51'903	53'246
Russian Federation	9'889	0.03%	612	329
Saudi Arabia	10'665	4.3%	10'634	31
Senegal	3'689	0.3%	113	3'576
Serbia	2'273	0.1%	665	1'608
Slovakia	15'406	1.9%	10'768	4'638
Slovenia	1'613	1.6%	1227	386
South Africa	981	0.03%	736	245
Spain	159'124	2.8%	141'878	17'247
Sweden	91'309	9.2%	84'636	6'673
Switzerland	7'081	4.8%		
Taiwan	2'059	-	2'059	
Tanzania	456	0.01%	128	328
Thailand	20'117	0.1%		
Tunisia	414	0.03%	1'088	
Turkey	159'195	1.4%	99'065	60'130
Ukraine	127'733	0.9%		
United Kingdom	43'728	1.4%	42'351	1'377
United States of America	328'474	0.5%		
Uruguay	2'800	0.3%	2'800	
Zambia	128	0.01%		
Total	**3'309'788**	**0.5%**	**1'837'127**	**578'939**

Source: FiBL-IFOAM Survey 2015; based on information from the private sector, certifiers, and governments.
For detailed data sources see annex, page 281.
Blank cells: No data available.

› Citrus fruit

The area of organic citrus fruits is shown in Table 24, which includes oranges, lemons, limes, grapefruit, pomelos, tangerines, and "other citrus". According to this data, almost 82'000 hectares of citrus fruit are grown organically worldwide. This constitutes 0.9 percent of the world's total citrus area of 8.7 million hectares in 2012 (FAOSTAT).[1]

As no crop details for the organic area were available for some of the world's leading citrus producers - Brazil (0.9 million hectares), Nigeria (0.8 million hectares) and India (0.75 million hectares) according to FAOSTAT - it can be assumed that the world figures for the area under organic citrus is higher.

In organic agriculture, the largest producer is Italy, with over 28'000 hectares constituting 19.7 percent of Italy's harvested citrus fruit area, followed by Mexico (almost 12'000 hectares, 2.2 percent), and China (more than 11'000 hectares, 0.5 percent).

Ghana has the highest proportion of organic citrus fruit with almost 29 percent of the harvested citrus fruit area according to the available data. It is followed by Italy and France (9.4 percent).

Since 2004, when 28'500 hectares of organic citrus were grown, the area has almost tripled.

Crop details were available for about three-quarters of the organic citrus fruit area: Oranges were grown in 52 percent of the citrus area, followed by lemons and limes with 12 percent (see Figure 31). The available data on the conversion status indicates that at least 18 percent of the organic citrus area was in-conversion in 2013 (15'000 hectares). Thus, there could be a considerable increase in supply of organic citrus fruit in the near future.

Citrus fruit: Use of organic citrus fruit area 2013
Source: FiBL-IFOAM Survey 2015

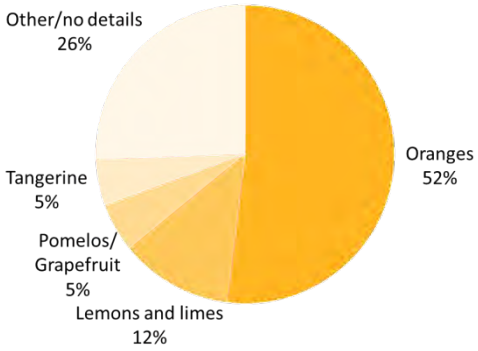


Figure 31: Citrus fruit: Use of organic citrus fruit area 2013
Source: FiBL-IFOAM survey 2015

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Table 24: Organic citrus fruit 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	1'155	0.9%		
Australia	480	1.7%		
Azerbaijan	21	0.9%	2	19
Chile	78	0.5%		
China	11'531	0.5%	5'928	5'602
Colombia	3	0.004%	2	1
Croatia	0	0.01%		0
Cuba	399	1.5%	326	73
Cyprus	67	2.1%	60	7
Dominican Republic	250	1.1%	150	100
Ecuador	691	1.9%	691	
El Salvador	9	0.1%	9	
France	220	9.4%	194	26
Georgia	7	0.03%		7
Ghana	6'783	28.9%	272	
Greece	1'389	2.8%	1'202	187
Indonesia	55	0.1%	55	
Iran	2	0.001%		2
Israel	196	1.1%	196	
Italy	28'816	19.7%	22'178	6'637
Jordan	50	0.7%		
Lebanon	10	0.1%	10	
Madagascar	12	0.1%		
Malta	1	0.6%	0	1
Mexico	11'917	2.2%	11'917	
Morocco	830	0.8%	760	70
Myanmar	20	-	20	
Paraguay	60	0.5%	60	
Peru	75	0.1%	56	
Senegal	16	0.2%	3	13
South Africa	1'631	2.2%	472	184
Spain	6'332	2.0%	4'437	1'894
Tunisia	10	0.03%		
Turkey	523	0.5%	320	203
United States of America	7'528	2.3%		
Uruguay	410	2.7%	410	
Total	**81'577**	**0.9%**	**49'764**	**15'026**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

› Cocoa beans

More than 220'000 hectares of cocoa were grown organically in 2013. This constitutes 2.3 percent of the world's harvested cocoa bean area of 9.9 million hectares 2012 (FAOSTAT).[1]

The world's leading producers are Côte d'Ivoire (2.5 million hectares), Indonesia (1.7 million hectares), Ghana (1.6 million hectares), and Nigeria (almost 1.2 million hectares).

The largest organic cocoa areas are in the Dominican Republic (118'500 hectares), Peru (21'000 hectares) and Mexico (19'000 hectares). Almost 90 percent of the world's organic cocoa area is in Latin America.

Some countries have when compared with the FAO data on harvested crops, very high shares. This can probably be attributed to the fact that some of the organic cocoa bean areas are managed extensively.

The organic cocoa bean area has grown almost fivefold since 2004 (approximately 50'000 hectares) and thus faster than most other crops/crop groups. However, some of the increase must be attributed to continually improving data availability.

The available data on the conversion status indicate that at least 7 percent of the organic cocoa area was in conversion in 2013 (16'500 hectares). Thus, a slight increase in supply of organic cocoa in the near future may be expected.

Cocoa beans: Development of the global organic area 2004-2013

Source: FiBL-IFOAM-SOEL 2006-2015

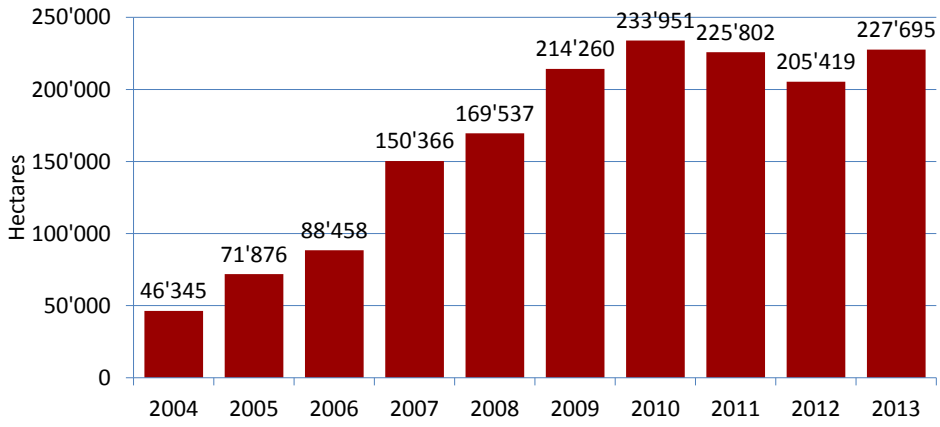


Figure 32: Cocoa beans: Development of the global organic area 2004-2013
Source: FiBL-IFOAM survey 2015

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Table 25: Organic cocoa bean area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Belize	1'982	-	1'946	37
Bolivia	8'266	82.7%	4'919	3'347
Colombia	381	0.4%	370	11
Costa Rica	121	2.6%		
Côte d'Ivoire	81	0.003%		
Dominican Republic	118'513	77.3%	108'234	10'279
Ecuador	13'283	3.4%	12'993	290
Ghana	8'336	0.5%		
Grenada	65	5.2%		
Haiti	2'812	12.8%		
Honduras	753	26.0%		
Madagascar	2'133	21.3%		
Mexico	19'382	16.4%	19'382	
Nicaragua	3'666	57.3%	1'521	2'146
Panama	14'021	-	4'224	436
Papua New Guinea	31	0.02%		
Peru	21'357	35.5%		
Sao Tome and Principe	3'748	18.7%		
Tanzania	3'919	35.6%	3'919	
Togo	1'096	1.0%		
Uganda	3'750	8.2%		
Total	**227'695**	**2.3%**	**157'507**	**16'544**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

For some of the countries in this table, the cocoa share was very high and not plausible; the corresponding figures were, therefore, eliminated. The high organic share, compared with the total area harvested according to FAO, is probably due to the fact that cocoa is grown more extensively in organic agriculture.
Additionally, for the other countries listed in this table, it should be kept in mind that the organic data might not be directly comparable to the overall cocoa area.

› Coffee

More than 725'000 hectares of coffee were grown organically in 2013. This constitutes 7.2 percent of the world's harvested coffee area of 10 million hectares in 2012, according to FAOSTAT[1].

The world's leading producers are Brazil (2.1 million hectares), Indonesia (1.2 million hectares), Colombia (0.8 million hectares), Mexico (almost 0.7 million hectares), and Vietnam (0.6 million hectares). Data on the organic production was available for all of these countries with the exception of Brazil. More than 60 percent of the world's organic coffee area is in Latin America and almost 30 percent in Africa.

In organic farming, the largest areas are in Mexico (243'000 hectares), Ethiopia (147'000 hectares), and Peru (110'000 hectares). Bolivia has the highest share, with 46 percent of organic coffee, followed by Nepal: (45 percent), Timor-Leste (45 percent), and Peru (35 percent). Some of these high percentages must be attributed to the fact that coffee is grown more extensively in organic agriculture, and often in association with other crops.

The organic coffee area has more than quadrupled since 2004.

Coffee: Development of the global organic area 2004-2013

Source: FiBL-IFOAM-SOEL 2006-2015

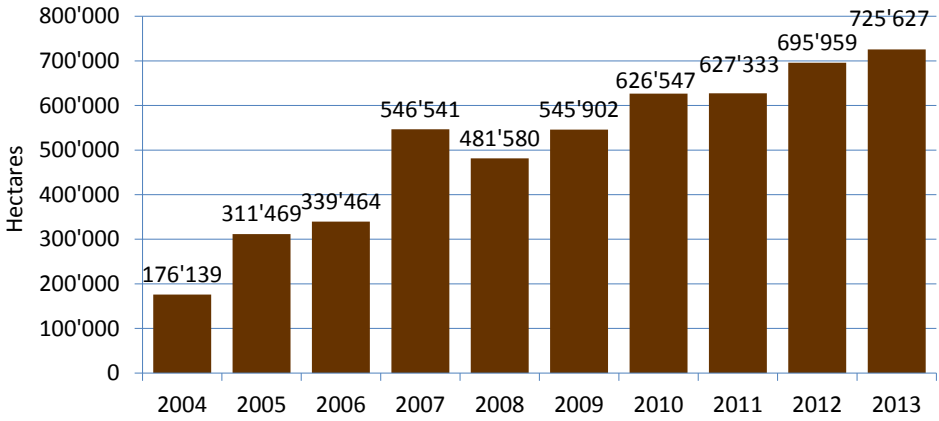


Figure 33: Coffee: Development of organic area 2004-2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Table 26: Organic coffee area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Angola	1'738	5.6%	1'738	
Bolivia	13'715	45.7%	11'820	1'895
Cameroon	99	0.05%		
Colombia	10'495	1.3%	7'973	2'523
Costa Rica	651	0.7%		
Cuba	1	0.04%		1
Dominican Republic	14'956	11.2%	14'156	800
Ecuador	3'464	4.4%	3'313	151
El Salvador	3'639	2.6%	3'617	22
Ethiopia	147'214	27.9%	147'214	
Guatemala	8'425	3.4%	6'925	1'500
Honduras	23'500	8.8%		
Indonesia	36'624	3.0%	36'621	3
Jamaica	7	0.1%		
Kenya	240	0.2%	120	120
Lao PDR	4'301	7.6%		
Madagascar	1'102	0.8%		
Mexico	242'603	34.9%	242'603	
Nepal	804	45.1%	804	
Nicaragua	12'257	10.0%	10'433	1'824
Panama	953	3.2%	227	
Papua New Guinea	18'308	25.1%		
Peru	110'512	35.4%		
Rwanda	82	0.2%		
Sao Tome and Principe	244	-		
Tanzania	26'104	20.5%	6'333	19'771
Thailand	1'180	2.3%		
Timor-Leste	24'690	44.9%		
Uganda	17'721	5.7%		
Total	**725'627**	**7.2%**	**493'896**	**28'609**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

For some of the countries in this table, the coffee share was very high and not plausible; the corresponding figures were, therefore, eliminated. The high organic share compared with the total area harvested according to FAO, is probably because some of the coffee is grown more extensively in organic agriculture.
Also, for the other countries listed in this table, it should be kept in mind that the organic data are perhaps not directly comparable to the overall coffee area.

› Fruit: Temperate fruit

The total area under organic temperate fruit production recorded here (over 200'000 hectares), is 1.8 percent of the total area of temperate fruit grown in the world (11.6 million hectares in 2012 according to FAOSTAT).[1]

Of the six most important temperate fruit growing countries in the world (China, India, Turkey, Iran, the United States, and Russia) only three (China, Turkey, and the United States), provided data on area of organic temperate fruits in 2013. It can, therefore, be assumed that the organic temperate fruit area is higher.

The countries with the largest organic temperate fruit areas are Poland (42'000 hectares), China (almost 35'000 hectares), Italy (28'000 hectares), the United States (18'000 hectares), Turkey (12'000 hectares), and France (10'000 hectares) (Table 28).

Since 2004, when data on land use and crops was collected for the first time (almost 60'000 hectares), the temperate fruit area has more than tripled. However, some of the increase must be attributed to continually improving availability of crop data. The increase in 2013 is partly due to the fact, that for the first time, data on organic temperate fruit has been made available for China.

The key temperate fruits are apples, with almost half of the temperate fruit area, followed by apricots, pears, plums and cherries (Table 27). Poland has one-quarter of the total organic apple area.

The available data on the conversion status indicate that a more than 30 percent of the total temperate fruit area is in-conversion. If this is indicative, there could be a considerable increase in supply of organic temperate fruit in the near future.

Table 27: Organic temperate fruit by crop 2013

Main crop	Area [ha]
Apples	93'219
Apricots	22'282
Cherries	9'299
Fruit, temperate, no details	25'299
Fruit, temperate, other	27'344
Nectarines	907
Peaches	4'074
Peaches and nectarines, no details	2'747
Pears	16'925
Plums	10'420
Quinces	35
Stone fruit, no details	471
Total	**213'023**

Source: FiBL-IFOAM survey 2015

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Temperate fruit: Use of organic temperate fruit area 2013
Source: FiBL-IFOAM Survey 2015

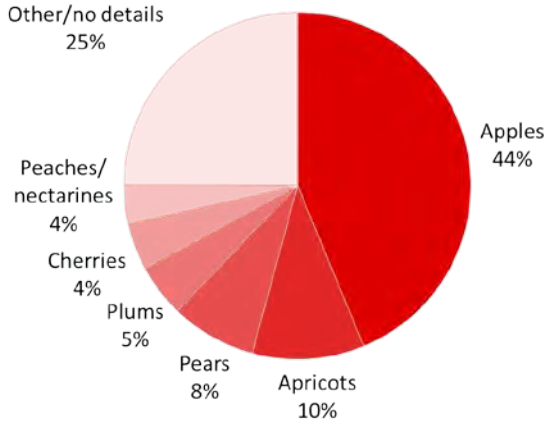


Figure 34: Temperate fruit: Distribution by crop 2013
Source: FiBL-IFOAM survey 2015

Temperate Fruit: Development of the global organic area 2004-2013
Source: FiBL-IFOAM-SOEL 2006-2015

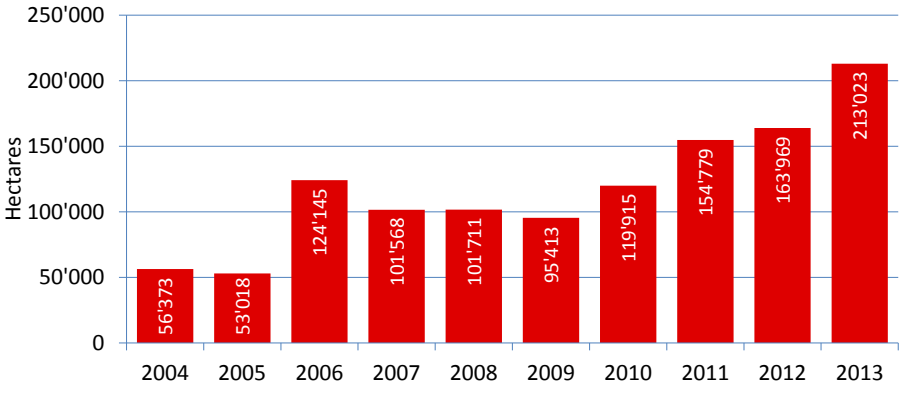


Figure 35: Temperate fruit: Development 2004-2013
Source: FiBL-IFOAM-SOEL surveys 2006-2015

Table 28: Organic temperate fruit 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	3'388	2.8%		
Australia	805	1.3%		
Austria	2'244	7.5%		
Azerbaijan	754	1.6%	112	642
Belgium	529	3.0%	426	103
Bhutan	0.1	0.003%		0.1
Bolivia	11	0.1%	11	
Bulgaria	3'128	6.6%	926	2'202
Canada	1'174	5.4%	1'174	
Chile	1'342	1.3%		
China	34'975	0.6%	16'542	18'433
Colombia	1	0.01%		1
Croatia	1'057	5.1%	589	469
Cyprus	66	2.8%	59	7
Czech Republic	5'998	35.4%[1]	4'768	1'230
Denmark	332	10.3%	308	24
Estonia	499	13.2%	362	136
Finland	67	9.6%	67	
France	10'323	10.1%	7'619	2'704
Georgia	942	4.1%	931	11
Germany	4'700	10.3%		
Greece	674	0.8%	556	118
Hungary	1'604	2.3%	1'064	540
Israel	110	1.0%	110	
Italy	28'324	12.7%	22'812	5'512
Japan	1'088	1.2%	1'088	
Jordan	325	4.9%		
Kyrgyzstan	10	0.02%		10
Latvia	842	23.4%		
Lebanon	38	0.1%	37	1
Lesotho	560	-	560	
Liechtenstein	3	-	3	
Lithuania	1'268	6.9%	1'006	262
Macedonia (FYROM)	154	0.6%	27	127
Madagascar	5	0.1%		
Malta	0	0.2%	0	0
Mexico	108	0.1%	108	
Moldova	1'326	-		
Morocco	100	0.2%	100	
Netherlands	396	2.3%		
New Zealand	477	4.0%		
Norway	176	8.4%	168	9
Oman	4	-		
Peru	768	4.3%	692	
Poland	41'990	15.1%	18'538	23'452
Portugal	6'471	16.8%		
Republic of Korea	1'676	2.6%		
Romania	4'668	3.4%	648	4'020
Russian Federation	31	0.01%		31
Serbia	834	0.3%	699	135

[1] The high share of temperate fruit in the Czech Republic some fruit types is due to the fact that in the official statistics only the intensive orchards are listed, whereas organic farming includes the extensive orchards.

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Slovakia	46	0.5%	37	9
Slovenia	1'030	15.8%	782	248
South Africa	508	0.9%	196	235
Spain	4'517	2.7%	3'593	924
Sweden	159	9.6%	139	20
Switzerland	619	9.5%		
Tunisia	7'141	10.1%	242	
Turkey	12'387	3.3%	6'250	6'137
Ukraine	400	0.2%		
United Kingdom	1'703	9.0%		
United States of America	18'147	6.1%		
Total	**213'023**	**1.8%**	**93'348**	**67'752**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

› Fruit: Tropical and subtropical fruit

The total area under organic tropical and subtropical fruit production recorded here (209'000 hectares) is 0.9 percent of the total area of tropical and subtropical fruit grown in the world (23.2 million hectares in 2012 according to FAOSTAT data).[1]

Of the five most important tropical and subtropical fruit growing countries in the world (India, China, Uganda, Brazil, and the Philippines, all with more than one million hectares), only the Philippines provided data on the area under organic tropical and subtropical fruit grown in 2013.

The largest organic growers for which data on the organic area was available (Mexico, Dominican Republic, Philippines, and Turkey) all have more than 20'000 hectares. Mexico, the Dominican Republic, and Turkey also have very high shares of tropical and subtropical fruit, more than the ten percent of their countries' total for these crops. In the case of the Dominican Republic, this is mainly due to a high share of bananas, and in the case of Mexico, mangoes and avocados. The largest proportions of organic tropical and subtropical fruit area are in the Dominican Republic (21.1 percent), France (19.8 percent; mainly kiwis), and French Polynesia (17.9 percent). By area, the key tropical and subtropical fruits are bananas, avocados, and mangos (Figure 36).

Since 2004, when data on land use and crops was collected for the first time, the tropical fruit area has increased fivefold (Figure 37); in 2013, a slight decrease of the area occurred. However, some of the increase in the past years must be attributed to the continually improving data availability.

The available data on the conversion status indicate that, at least, almost ten percent of the total tropical and subtropical fruit area is in-conversion. This suggests that an increase in supply in the near future may be expected.

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Table 29: Organic tropical and subtropical fruit 2013

Main crop	Area [ha]
Avocados	44'862
Bananas	79'927
Camu camu	140
Carobs	1'513
Cashew apples	907
Dates	4'775
Figs	15'639
Fruit, tropical and subtropical, no details	19'537
Fruit, tropical and subtropical, other	5'634
Guava	68
Kiwis	5'105
Litchi	645
Mangos	23'301
Noni	309
Papayas	1'305
Passion fruit	139
Persimmons	306
Pineapples	3'776
Pitaya	252
Pomegranate	1'099
Total	**209'240**

Source: FiBL-IFOAM survey 2015

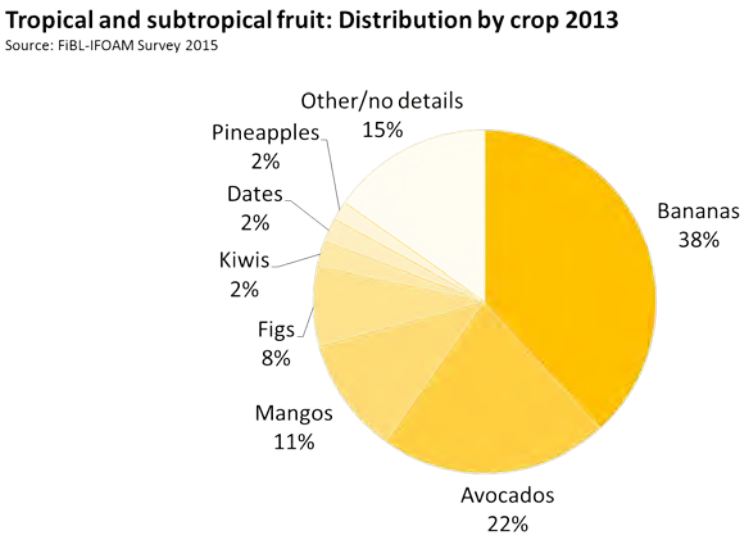


Figure 36: Tropical and subtropical fruit: Distribution by crop 2013

Source: FiBL-IFOAM survey 2015

Tropical and subtropical fruit: Development 2004-2013

Source: FiBL-IFOAM-SOEL 2006-2015

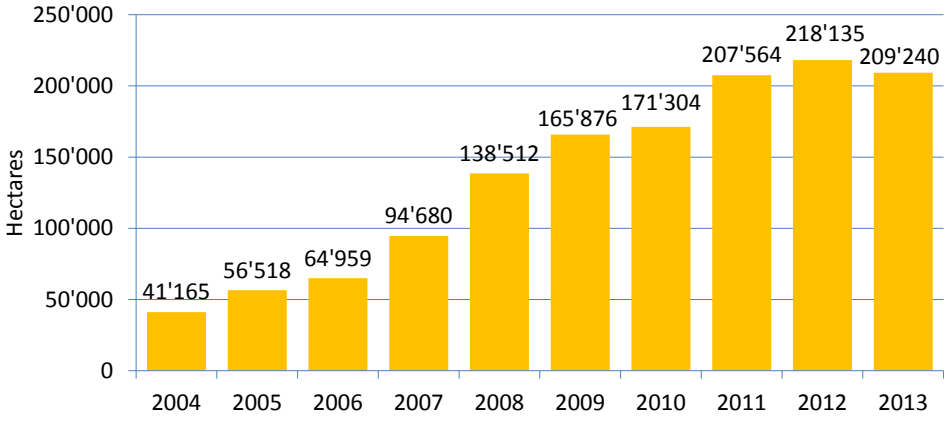


Figure 37: Tropical and subtropical fruit: Development 2004-2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015

Table 30: Organic tropical and subtropical fruit 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Algeria	502	0.2%	496	6
Argentina	194	1.9%		
Australia	228	0.6%		
Azerbaijan	495	5.2%	180	315
Bangladesh	10	0.003%		
Benin	54	0.4%		
Bolivia	394	0.6%	271	123
Bulgaria	13	64.8%	0	13
Burkina Faso	3'683	-	1'791	83
Burundi	550	0.3%		
Cambodia	122	0.3%	122	
Cameroon	135	0.04%		
Canada	0	10.0%	0	
Chile	533	1.1%		
Colombia	1'746	0.3%	1'723	22
Cook Islands	20	16.8%	20	
Costa Rica	5'361	5.1%		
Côte d'Ivoire	445	0.1%	445	
Croatia	68	9.7%	51	17
Cuba	1'375	1.0%	1'170	205
Cyprus	54	2.9%	52	2
Dominican Republic	29'201	21.2%	25'401	3'800
Ecuador	12'379	3.6%	12'159	220
El Salvador	1'164	4.3%	1'164	
Fiji	122	10.2%	122	
France	857	19.8%	723	134
French Guiana (France)	45	-	31	14

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
French Polynesia	85	17.9%	85	
Georgia	29	-	1	28
Ghana	551	0.2%	292	129
Greece	680	3.9%	431	249
Grenada	19	1.2%		
Guadeloupe (France)	13	0.4%	6	7
Guatemala	35	0.03%	35	
Guinea-Bissau	200	1.1%	200	
Indonesia	564	0.1%	555	9
Iran	2'186	1.2%	774	1'412
Israel	888	3.8%	885	3
Italy	4'882	14.3%	3'666	1'216
Jamaica	2	0.01%		
Jordan	368	8.4%		
Kenya	1'621	1.1%	1'500	121
Lebanon	3	0.1%	3	1
Madagascar	1'250	0.6%		
Malawi	265	0.5%	265	
Mali	66	0.1%		
Malta	1	2.0%	1	1
Martinique (France)	46	0.6%	15	31
Mauritius	2	0.2%		
Mexico	57'266	12.1%	57'266	
Morocco	1'682	1.2%	1'482	200
Mozambique	2'002	2.4%	2'002	
Myanmar	48	0.1%	48	
Pakistan	878	0.2%		
Peru	8'009	3.3%	1'236	
Philippines	25'300	2.3%	20'415	
Réunion (France)	133	-	61	72
Rwanda	2'000	0.5%		
Saudi Arabia	6'898	4.3%	5'499	1'398
Senegal	1'298	6.1%	1'088	210
Serbia	0	-	0	
Slovenia	16	21.2%	5	11
South Africa	1'692	4.5%	1'057	357
Spain	1'879	2.4%	1'115	763
Sudan	140	-		
Taiwan	833	-	833	
Tanzania	422	0.1%		422
Thailand	1'272	0.1%		
Togo	294	14.2%		
Tunisia	912	1.1%		
Turkey	16'044	15.4%	6'597	9'447
United States of America	6'716	16.5%		
Total	**209'240**	**0.9%**	**154'553**	**21'043**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

› Grapes

Over 300'000 hectares of organic grapes are grown, which constitutes 4.6 percent of the world's grape growing area (6.8 million hectares in 2012 according to FAOSTAT).[1] In Europe, 258'000 hectares (6.6 percent of the harvested grape area) are organic.

Not all of the grape area listed in the table is used for wine making. The production of table grapes and raisins is important in many countries, for example, Turkey. All of the five most important grape growing countries in the world (Spain, France, Italy, China, and Turkey) provided data on the area under organic grapes in 2013.

The countries with the largest organic grape areas are Spain, Italy and France; each with more than 60'000 hectares of organic grapes. Some of the highest shares are also in these countries (Table 31). Almost 90 percent of the world's organic grapes area is in Europe.

Since 2004, when data on land use and crops were collected for the first time, the organic grape area has more than tripled. However, some of the increase must be attributed to continually improving availability of crop data. For China, for the first time data on grapes became available, 19'000 hectares; this explains partly the large growth in 2013.

The available data indicate that a large part of the total grape area (at least 30 percent) is in-conversion. Thus, a considerable increase in supply of organic grapes may be expected, particularly from Spain, France, and Italy.

Grapes: Development 2004-2013

Source: FiBL-IFOAM-SOEL 2006-2015

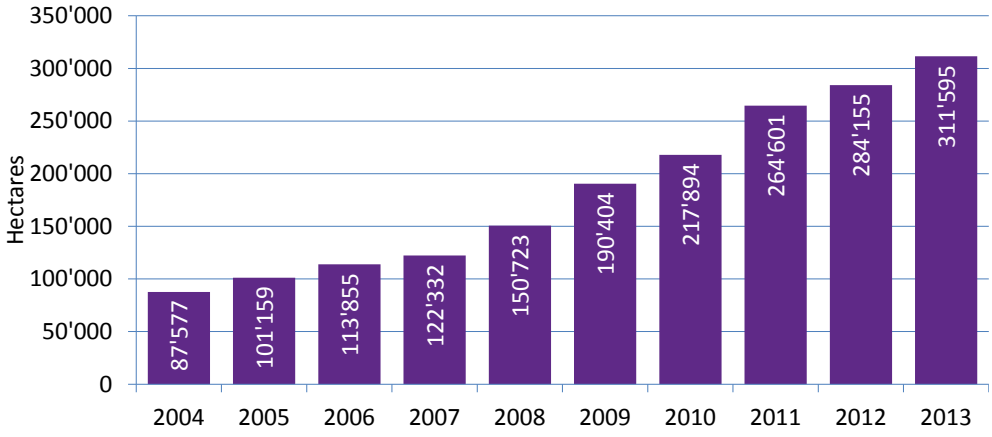


Figure 38: Organic grape area: Development 2004-2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Table 31: Organic grape area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	11	0.1%		
Algeria	205	0.3%	205	
Andorra	1	-		
Argentina	4'139	1.9%		
Australia	282	0.2%		
Austria	4'414	10.1%		
Azerbaijan	41	0.3%	1	40
Belgium	1	12.7%	1	
Bosnia and Herzegovina	8	0.1%	8	
Bulgaria	3'872	5.0%	988	2'884
Canada	347	3.1%	347	
Chile	3'595	1.8%		
China	19'174	3.2%	10'352	8'822
Croatia	791	2.7%	356	435
Cyprus	222	2.4%	195	27
Czech Republic	1'005	6.4%	668	336
Denmark	14	-	8	6
France	64'610	8.5%	49'262	15'347
Georgia	119	0.3%	39	80
Germany	7'100	7.1%		
Greece	4'718	4.8%	3'835	883
Hungary	1'207	1.7%	559	649
Indonesia	5	-	5	
Iran	1'316	0.6%	1'293	23
Israel	73	0.9%	73	
Italy	67'937	9.8%	44'174	23'763
Jordan	358	9.1%		
Kazakhstan	20	0.2%	20	
Lebanon	376	3.6%	376	
Liechtenstein	1	-	1	
Luxembourg	22	1.8%	22	
Macedonia (FYROM)	42	0.2%	31	11
Malta	5	0.3%	2	3
Mexico	4'290	15.9%	4'290	
Moldova	4'641	-		
Morocco	55	0.1%	55	
Netherlands	17	8.3%		
New Zealand	2'500	7.2%		
Poland	35	-	21	14
Portugal	2'523	1.4%		
Romania	1'649	0.9%	762	887
Russian Federation	16	0.03%		16
Serbia	24	0.1%	8	16
Slovakia	68	0.6%	53	15
Slovenia	401	2.5%	248	153
South Africa	665	0.5%	86	36
Spain	83'932	8.9%	53'421	30'511
Switzerland	555	3.7%		
Turkey	8'418	1.8%	3'851	4'566
Ukraine	90	0.1%		
United States of America	15'647	4.0%		
Uruguay	40	0.5%	40	
Total	**311'595**	**4.6%**	**175'656**	**89'522**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: Not data

› Oilseeds

An area of almost 780'000 hectares was reported to be used for growing organic oilseeds in 2013. This is approximately 0.4 percent of the world's total harvested oilseed area (more than 201 million hectares according to FAOSTAT).[1]

The main countries in which oilseeds are grown are the United States, India, Brazil, and China (each with more than 20 million hectares). However, of these countries, data on the organic area was available only for the United States and China.

The countries with the largest organic oilseed area are China, Kazakhstan, the United States, Romania, Ukraine, and Canada.

The highest organic shares are in Peru (21 percent; soybeans and peanuts), El Salvador (15 percent; sesame), Austria (10.1 percent; soya and sunflower seed), Israel (5.9 percent; jojoba), and Kazakhstan (5.1 percent; rapeseed and linseed).

Since 2004, when data on land use and crops was collected for the first time, the oilseed area (2004: 144'000 hectares) has increased more than fivefold. However, some of the increase must be attributed to continually improving availability of crop data. In the year 2013, China supplied more detailed crop data than in the past, which explains partly the increase of 140'000 hectares compared to 2012.

Almost thirty percent of the organic oilseed area is for soybeans, and another twenty percent is for sunflower seeds and peanuts (Figure 40).

The data available for a breakdown of the total fully converted and in-conversion area shows that, if the relative figures are indicative of the proportions of the total area, approximately 15 percent is in-conversion, and will be fully converted in the next few years. This has implications for the availability of organic oilseeds in the near future.

Table 32: Organic oilseeds 2013

Main crop	Area [ha]
Jojoba	752
Linseed (oil flax)	51'701
Mustard	3'011
Oilseeds, no details	181'427
Oilseeds, other	17'213
Peanuts	79'961
Poppy seed	1
Pumpkin seeds	238
Rape and turnip rape	70'490
Sacha inchi	295
Safflower	4'830
Sesame	58'397
Soybeans	224'616
Sunflower seed	86'873
Total	**779'803**

Source: FiBL-IFOAM survey 2015

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

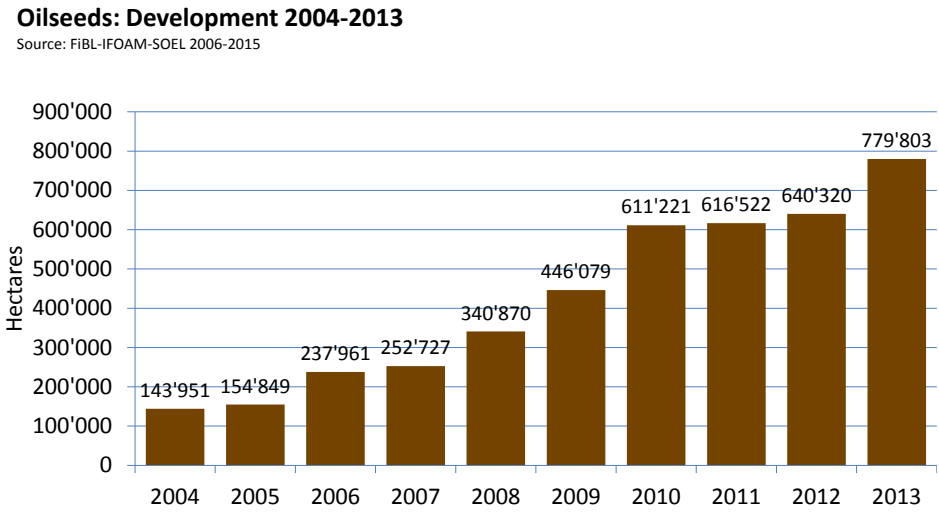


Figure 39: Organic oilseed area: Development 2004-2013
Source: FiBL-IFOAM-SOEL surveys 2006-2015

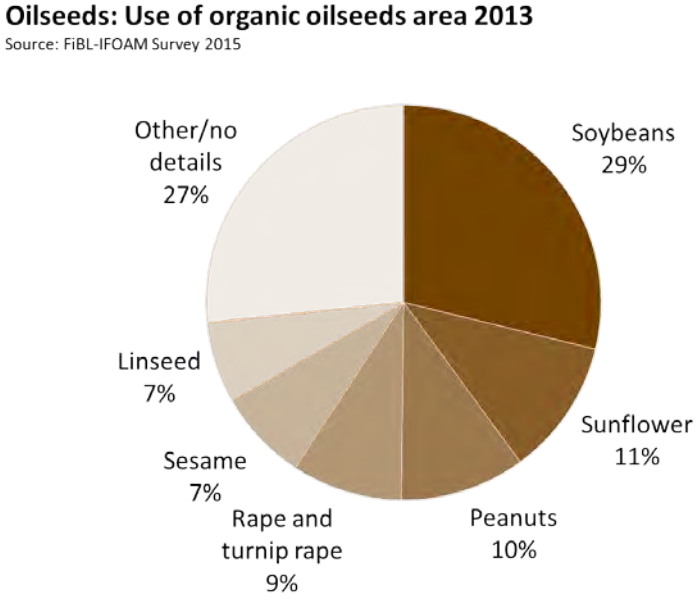


Figure 40: Organic oilseed area: Use of oilseed area by crop 2013
Source: FiBL-IFOAM survey 2015

Table 33: Organic oilseeds area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	14'986	0.1%		
Australia	217	0.01%		
Austria	14'459	10.1%		
Azerbaijan	126	0.6%	50	76
Belgium	57	0.2%	45	13
Benin	99	0.1%		
Bolivia	8'821	0.6%	8'047	774
Bulgaria	2'649	0.3%	589	2'060
Burkina Faso	5'550	0.9%		
Canada	32'020	0.3%	32'020	
China	235'446	1.1%	179'007	56'439
Colombia	0	0.001%	0	
Croatia	2'353	2.4%	1'239	1'114
Czech Republic	1'737	0.4%	1'632	105
Denmark	748	0.6%	714	34
Ecuador	1'000	1.4%	1'000	
El Salvador	839	15.0%	839	
Ethiopia	17'563	2.0%	14'444	3'119
Finland	2'125	3.7%	2'125	
France	29'177	1.2%	25'339	3'837
Germany	6'800	0.5%		
Greece	847	1.2%	289	558
Guatemala	342	0.6%		342
Hungary	8'685	1.0%	6'691	1'995
Israel	449	5.9%	449	
Italy	10'781	3.9%	9'409	1'372
Kazakhstan	82'493	5.1%	66'227	16'266
Kyrgyzstan	30	0.1%	21	9
Lithuania	3'249	1.2%	2'487	762
Luxembourg	14	0.3%	14	
Macedonia (FYROM)	76	1.2%	36	40
Madagascar	2'500	4.0%		
Mali	2'525	0.6%		
Mexico	2'265	0.5%	2'265	
Mongolia	6'461	-		
Mozambique	895	0.1%	895	
Namibia	26	2.7%	26	
Nepal	122	0.03%		122
Netherlands	34	0.7%		
Nicaragua	2'500	5.5%	2'500	
Nigeria	202	0.01%		
Norway	16	0.3%	16	
Paraguay	2'129	0.1%	4'000	
Peru	1'442	21.0%	1'419	
Poland	1'573	0.2%	474	1'099
Romania	43'923	3.5%	26'907	17'016
Russian Federation	170	0.002%	4	166
Senegal	1'312	0.2%	925	387
Serbia	667	0.2%	164	502
Slovakia	2'533	1.1%	2'029	504
Slovenia	152	2.7%	96	56
South Africa	228	0.02%	175	
Spain	10'999	1.4%	10'232	766

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Sudan	91'210	-	83'000	3'000
Sweden	3'628	3.1%	3'449	178
Switzerland	481	1.8%		
Tanzania	455	0.02%		455
Togo	3'226	4.2%	742	7
Turkey	3'131	0.4%	1'982	1'148
Ukraine	38'530	0.5%		
United Kingdom	828	0.1%		
United States of America	71'636	0.2%		
Uruguay	200	0.02%	200	
Zambia	70	0.02%		
Total	**779'803**	**0.4%**	**494'212**	**114'322**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: no data.

› Olives

More than 611'000 hectares of olives were reported to be under organic production in 2013. This represents 6 percent of the world's total harvested olive area (10.2 million hectares according to FAOSTAT).[1]

The main countries, in which olives are grown, are the countries around the Mediterranean. Spain is by far the largest grower with 2.4 million hectares, followed by Tunisia (1.8 million hectares) and Italy (1.1 million hectares). Morocco and Greece, both with 0.9 million hectares, are also important producers. For all these countries, data for the organic area was available. Italy has the largest area of organic olives (more than 175'000 hectares), followed by Spain (almost 170'000 hectares), and Tunisia (124'000 hectares). Almost 80 percent of the world's organic olive area is in Europe, followed by northern Africa with 20 percent of the world organic olive area.

In Italy, the percentage of area under organic production is relatively high (15.6 percent). In Spain, 7 percent of the olive area is organic and in Tunisia 6.9 percent. France has the highest share of organic olives area, with 25.1 percent of all olives being organic.

Since 2004, when data on land use and crops were collected for the first time, the olive area doubled. However, some of the increase must be attributed to continually improving availability of crop data.

The available data indicate that a large part of the total olive area (almost 30 percent) is in-conversion. If this is indicative, an increase in supply of organic grapes may be expected.

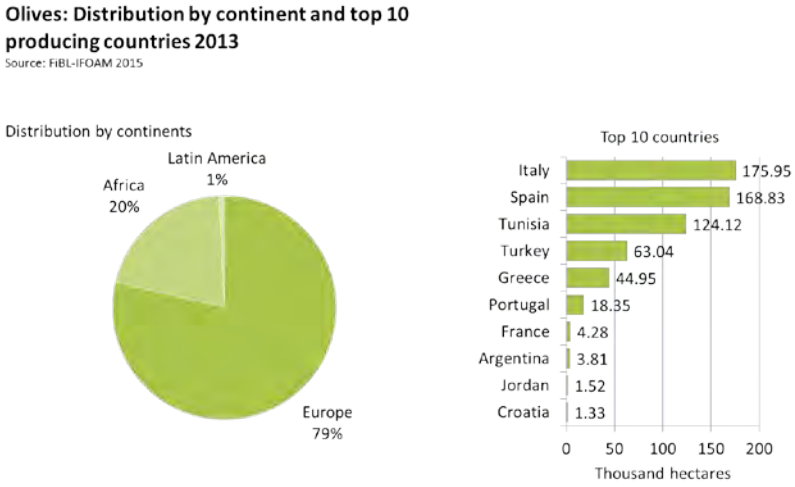


Figure 41: Organic olive area: Distribution by continent and top 10 producing countries 2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015 based on national data sources and certifier data. For detailed data sources see annex, page 281.

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Olives: Development 2004-2013

Source: FiBL-IFOAM-SOEL 2006-2015

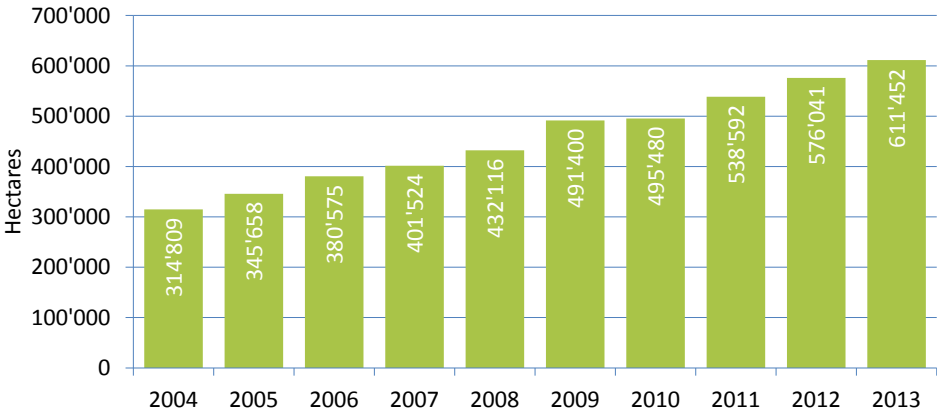


Figure 42: Organic olive area: Development 2004-2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015 based on national data sources and certifier data. For detailed data sources see annex, page 281.

Table 34: Organic olive area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	375	0.8%		
Argentina	3'807	5.9%		
Australia	470	1.2%		
Azerbaijan	13	0.7%	5	8
Bulgaria	0	-	0	
Chile	659	4.4%		
Croatia	1'330	7.3%	460	870
Cyprus	1'134	10.4%	950	184
France	4'284	25.1%	2'863	1'421
Greece	44'948	4.8%	24'997	19'952
Iran	150	0.5%	150	
Israel	233	0.7%	233	
Italy	175'946	15.6%	129'574	46'372
Jordan	1'516	2.4%		
Lebanon	291	0.5%	230	61
Macedonia (FYROM)	0.3	0.004%	0.3	
Malta	5	85.0%	5	1
Morocco	1'198	0.1%	1'070	128
Peru	95	0.7%	89	
Portugal	18'345	5.3%		
Slovenia	208	23.4%	76	133
South Africa	29	-	18	6
Spain	168'830	7.0%	110'315	58'515
Tunisia	124'123	6.9%	100'505	
Turkey	63'038	7.8%	17'738	45'299
Uruguay	425	14.2%	425	
Total	**611'452**	**6.0%**	**389'703**	**172'949**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

› Protein crops

The total area under organic protein crops is almost 300'000 hectares, which is 0.4 percent of the total area of protein crops grown in the world (79 million hectares in 2012 according to FAOSTAT).[1]

No current data on the organic area was available from the three most important protein crop-growing countries in the world: India, Niger, and Myanmar; India (26 million hectares) was by far the largest grower.

The countries with the largest organic protein crop areas are France, Spain, Canada, Italy, and Germany. Sweden has the highest share of protein crop organic area with more than 70 percent. The overall shares have a tendency to be high as protein crops play an important role in organic farming.

The protein crop area has almost quadrupled from 78'000 to 297'000 hectares since 2004, when data on land use and crops was collected for the first time. However, some of the increase must be attributed to continually improving availability of crop data. In 2013, the protein crop area went down compared with 2012 - by more 21'000 hectares or by 7 percent.

Unfortunately, for protein crops, a breakdown for individual crops is not available for many countries. For instance, Eurostat - the statistical office of the European Union - communicates only one figure for "dried pulses". The data available for a breakdown of the total fully converted and in-conversion area shows that at least 10 percent is in conversion, and will be fully converted in the next few years. This has implications for the availability of organic protein crops in the near future.

Protein crops: Development 2004-2013

Source: FiBL-IFOAM-SOEL 2006-2015

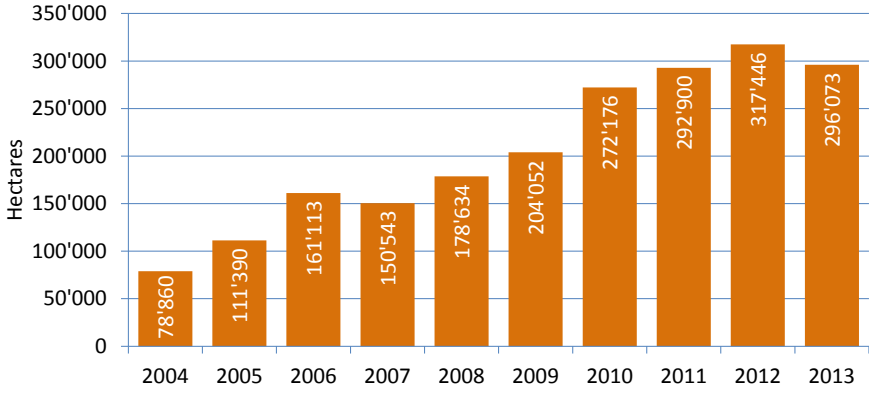


Figure 43: Organic protein crop area: Development 2004-2013

Source: FiBL-IFOAM-SOEL surveys 2006-2015

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Table 35: Organic protein crop area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	396	0.1%		
Australia	18	0.1%		
Austria	10'351	49.5%		
Azerbaijan	6	0.05%	2	4
Belgium	120	9.7%	107	13
Canada	28'917	1.1%	28'917	
Chile	20	0.06%		
Colombia	1	0.001%	1	
Croatia	142	13.9%	77	65
Czech Republic	1'944	9.0%	1'760	184
Denmark	3'310	48.7%	2'516	794
Ecuador	190	0.3%	190	
Estonia	2'299	21.0%	1'734	565
Finland	2'682	67.1%	2'682	
France	46'002	20.6%	40'457	5'544
Germany	25'000	30.3%		
Greece	4'669	27.9%	3'329	1'340
Hungary	1'464	7.0%	1'267	196
Israel	41	0.5%	41	
Italy	26'909	35.3%	22'686	4'224
Kazakhstan	18'399	16.7%	14'099	4'300
Kyrgyzstan	279	0.5%	101	178
Lithuania	22'790	54.7%	21'033	1'757
Luxembourg	91	46.2%	91	
Madagascar	59	0.05%		
Moldova	4'641	-		
Namibia	33	0.2%	33	
Netherlands	83	3.1%		
Norway	166	8.1%	129	37
Peru	3	0.001%	3	
Poland	5'698	2.8%	4'370	1'328
Romania	2'764	5.0%	2'215	549
Russian Federation	850	0.1%		
Rwanda	1'400	0.3%		
Senegal	228	0.2%		228
Slovakia	246	3.4%	174	72
South Africa	269	0.4%	33	236
Spain	34'601	11.2%	32'416	2'185
Sweden	9'819	72.1%	8'707	1'112
Switzerland	646	16.9%		
Turkey	8'405	1.1%	6'361	2'044
Ukraine	9'920	3.5%		
United Kingdom	1'335	0.7%		
United States of America	18'835	1.6%		
Zambia	30	0.05%		
Total	**296'073**	**0.4%**	**195'530**	**26'957**

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.
Blank cells: No data available.

For some of the countries in this table, the organic protein crop share was very high and not plausible; the corresponding figures were, therefore, eliminated.

› Vegetables

The total area under organic vegetable production (305'342 hectares) is 0.5 percent of the total area of vegetables grown in the world (56 million hectares in 2012 according to FAOSTAT).[1]

Of the four most important vegetable growing countries in the world (China, India, Nigeria, and Turkey), organic data was only available for China and Turkey.

The countries with the largest organic vegetable areas are the United States, China, Mexico, and Italy (each with areas over 20'000 hectares). The United States reported almost 60'000 hectares of organic vegetables.

The highest shares of the total vegetable areas are in Denmark, Austria, Switzerland, and Germany. These are also the countries in Europe that have the largest organic market shares for organic food.

Since 2004, when data on organic land use and crops were collected for the first time, the vegetable area has tripled from 105'000 to the current 305'000 hectares. However, some of the increase must be attributed to continually improving availability of crop data. The major increase in 2013 is due to the fact that data from China became available for the first time.

Unfortunately, for vegetables, a breakdown for individual vegetable groups is available for only half of the organic vegetable area. A large part (32'000 hectares) is for pulses (fresh beans and peas), followed by leafy and stalked vegetables (salads) and fruit vegetables.

The data available for a breakdown of the fully converted and in-conversion area shows that more than three-quarters of the total organic vegetable area is fully converted. If the relative figures are indicative of the proportions of the total area, about 15 percent is in-conversion, and will be fully converted in the next few years, implying that there will probably not be an important increase of the organic vegetable area.

[1] FAOSTAT > PRODUCTION > PRODSTAT > CROPS. The FAOSTAT webpage at http://faostat.fao.org/site/567/DesktopDefault.aspx?PageID=567#ancor

Vegetables: Development 2004-2013
Source: FiBL-IFOAM-SOEL 2006-2015

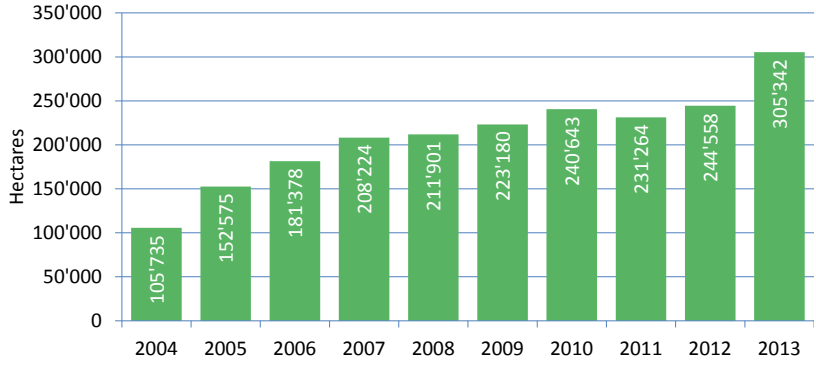


Figure 44: Organic vegetable area: Development 2004-2013
Source: FiBL-IFOAM-SOEL surveys 2006-2015

Table 36: Organic vegetable area 2013

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	2	0.005%		
Argentina	961	0.5%		
Australia	1'388	2.3%		
Austria	2'514	19.9%		
Azerbaijan	213	0.2%	55	158
Bangladesh	157	0.03%		
Belgium	880	1.5%	829	51
Bhutan	77	0.7%		77
Bolivia	265	0.3%	265	
Bosnia and Herzegovina	31	0.02%	2	29
Bulgaria	877	3.9%	191	686
Burkina Faso	4	0.01%		
Cambodia	38	0.03%	36	2
Canada	3'545	5.7%	3'545	
Chile	648	1.1%		
China	49'209	0.2%	26'326	22'883
Colombia	11'225	10.8%	11'155	70
Costa Rica	352	2.5%		
Croatia	162	1.7%	100	62
Cyprus	50	1.8%	31	19
Czech Republic	167	1.4%	163	5
Denmark	1'796	21.3%	1'779	17
Dominican Republic	120	0.3%	120	
Ecuador	202	0.1%	202	
El Salvador	34	0.5%	34	
Estonia	132	5.1%	107	25
Finland	117	1.5%	117	
France	14'268	6.6%	13'405	863

Statistics: Crops - Vegetables

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
French Guiana (France)	23	-	20	3
Georgia	5	0.02%		5
Germany	10'785	10.7%		
Ghana	75	0.1%		
Greece	1'324	1.4%	1'133	192
Guadeloupe (France)	3	0.1%	3	
Guatemala	565	0.6%	485	80
Hungary	1'741	3.6%	1'699	42
Indonesia	276	0.03%	259	18
Iraq	30	0.01%		
Ireland	250	5.0%	241	9
Israel	2'323	4.0%	2'315	8
Italy	21'947	5.0%	17'708	4'239
Jamaica	241	1.4%		
Japan	4'866	1.4%	4'866	
Jordan	75	0.2%		
Kenya	172	0.1%	146	26
Kyrgyzstan	44	0.1%	32	12
Lao PDR	518	0.4%	18	500
Latvia	242	3.4%		
Lebanon	52	0.2%	43	9
Liechtenstein	4	-	4	
Lithuania	60	0.5%	56	5
Luxembourg	33	-	33	
Macedonia (FYROM)	66	0.1%	34	32
Madagascar	34	0.1%		
Malta	7	0.1%	7	0
Martinique (France)	9	0.4%	7	2
Mauritius	5	0.1%		
Mexico	46'573	7.3%	46'573	
Moldova	221	-		
Morocco	942	0.5%	942	
Mozambique	8	0.01%	8	
Myanmar	23	0.004%	23	
Namibia	25	0.4%	5	20
Netherlands	5'766	7.6%	4'267	684
Nicaragua	1	0.01%	1	
Niger	30	0.04%		
Norway	179	4.1%	175	4
Oman	16	0.1%		
Panama	209	1.4%	20	
Peru	1'001	0.6%	45	
Philippines	31	0.004%	31	
Poland	9'379	5.9%	5'933	3'446
Portugal	764	0.9%		
Republic of Korea	3'138	1.2%		
Réunion (France)	85	-	61	24
Romania	893	0.3%	150	743
Russian Federation	96	0.01%	87	5
Saudi Arabia	3'143	3.2%	2'890	253
Senegal	168	0.3%	43	125

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Serbia	100	0.1%	74	26
Slovakia	722	3.7%	712	10
Slovenia	229	4.8%	174	55
South Africa	1'806	1.5%	877	296
Spain	8'654	2.8%	6'991	1'664
Sweden	1'247	6.2%	1'188	59
Switzerland	1'736	13.3%		
Taiwan	1'957	-	1'957	
Tanzania	2'031	0.6%	778	1'253
Thailand	709	0.1%		
Tunisia	76	0.1%	1	
Turkey	2'323	0.2%	1'526	797
Ukraine	5'328	1.0%		
United Kingdom	10'030	9.7%		
United States of America	59'669	7.2%		
Uruguay	300	3.9%	300	
Zambia	525	1.0%	225	300
Total	305'342	0.5%	163'627	39'890

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

Data collection on organic agriculture worldwide: Background

For the 16th survey on organic agriculture worldwide, data on organic agriculture were available for 170 countries. Since 1999, when the data collection started, the number of countries included has almost doubled.

Whereas for the first survey on organic agriculture worldwide, only information on the total organic land and the number of farms was collected, the scope of the survey has expanded considerably in the past years, which was made possible by funding from the Swiss State Secretariat of Economic Affairs (SECO), the International Trade Centre (ITC), and NürnbergMesse, the organizers of the Biofach trade fair. In the framework of the European OrganicDataNetwork project (2012-2014),[1] detailed data on the organic market in Europe were compiled for the first time.

Data availability by data type and collection systems

In general, data availability is improving every year. This is because more and more countries are establishing data collection systems. *Data on land use, crops, production, and operators* are being more widely gathered, either by the private sector or by government organizations, and are mostly based on data of the certifiers. The availability of *domestic market and international trade data* is also improving. Domestic market data are mostly based on research carried out by market research companies and statistical offices. Import and export data is mainly collected by governments and can be based on the data from certifiers and/or customs but is most commonly based on company data (see also Zanoli et al. 2014).

Governmental *data collection systems* are often linked to the establishment of regulations about organic agriculture. Once such a regulation is established, there are rules about the registration of certifiers with a national authority. This opens up access to data from the certifiers. Public data collection systems mostly cover the organic area and operators, and sometimes cover production and international trade data, but they mostly exclude data on the domestic market. In most countries, the government collection systems for area, livestock and operator data are based on the data from the certifiers. In the European Union, the organic farming regulation describes precisely what data should be provided by the competent authorities who collect the data from the control bodies.[2]

[1] OrganicDataNetwork: Data network for better European organic market information. Information is available at www.organicdatanetwork.net

[2] Commission Regulation (EC) No 889/2008 of 5 September 2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control
Preamble (36), page 4, L 250/4:
"Notifications of information by the Member States to the Commission must enable it to use the information sent directly and as effectively as possible for the management of statistical information and referential data. To achieve this objective, all information to be made available or to be communicated between the Member States and the Commission should be sent electronically or in digital form."
Article 93, page 36 Statistical information, L 250/31:

1. Member States shall provide the Commission with the annual statistical information on organic production referred to in Article 36 of Regulation (EC) No 834/2007 by using the computer system enabling electronic exchanges of documents and information made available by the Commission (Eurostat) before 1 July each year.

2. The statistical information referred to in paragraph 1 shall comprise, in particular the following data:
(a) the number of organic producers, processors, importers and exporters;

The data collected by the government are mostly, though not always, complete, as many countries do not have access to the data from foreign certifiers that are not registered under the country's accreditation system.

In many cases, the p*rivate sector collates the data from the certifiers or the organic operators* in the countries. However, often, the private sector does not have full access to the data. Finally, there are *countries that have no data collection system* in place. Collection systems are still underdeveloped, particularly in countries in Africa and Asia. For these countries, FiBL and IFOAM attempt to get the data from major international certifiers or from contacts in the country, who provide data specifically for the survey. These data are often not complete, or there is a problem with continuity over the years.

Regional initiatives

The following are notable initiatives that have recently improved data collection systems, or are in the process of being set up.

- The European Commission stipulates that all EU member states provide data for variables such as area, land use, number of operators and livestock, and production volumes. Eurostat, the statistical office of the European Union, compiles these data, which are accessible on the Eurostat homepage.[1]
- The European-funded research project OrganicDataNetwork, which ran from 2012 to 2014 and aimed to improve the collection of market data, has helped to increase the availability of market data in Europe (see page 216). In the framework of this project, good progress was made toward the improvement of organic market data collection. In its final year, the project produced a number of key documents and tools that are available to the public at the project website. Results include six country case studies (Gerrard et al. 2014). Furthermore a Code of Practice and Manual for the initiation and maintenance of good organic market data collection and publication procedures (OrMaCode) was written (Zanoli et al. 2014), and a market database, which is available at the OrganicDataNetwork's website at http://www.organicdatanetwork.net/odn-statistics.html, was created. Finally, a set of recommendations of for improving market data collection was published (Zanoli et al. 2014b).
- The Mediterranean Organic Agriculture Network (MOAN) is a network of the authorities in charge of organic farming that was set up by the Mediterranean Agricultural Institute in Bari, Italy, to promote data collection. Regular meetings and support through the Mediterranean Agronomic Institute of Bari (IAMB) have considerably improved data collection in the Mediterranean area in recent years. The data provided through this network is very important for data collection on

(b) the organic crop production and crop area under conversion and under organic production;
(c) the organic livestock numbers and the organic animal products;
(d) the data on organic industrial production by type of activities.

3. For the transmission of the statistical information referred to in paragraphs 1 and 2, Member States shall use the Single Entry point provided by the Commission (Eurostat).

4. The provisions relating to the characteristics of statistical data and metadata shall be defined within the context of the Community Statistical Programme on the basis of models or questionnaires made available via the system referred to in paragraph 1.

[1] Access via http://ec.europa.eu/eurostat/data/database

organic agriculture worldwide (see also article by Bteich et al. on page 223 and Pugliese et al. 2014).

– In the Pacific Islands, there are currently efforts to better coordinate organic activities in the region including the setting up of data collection systems (see also article by Karen Mapusua, page 266).

Global Survey on Voluntary Sustainability Standards (VSS)

The Research Institute of Organic Agriculture FiBL is currently expanding its data collection activities to further standards. The project "Global Survey on Voluntary Sustainability Standards (VSS)," which started in 2014, aims to set up a system to collect, process, and disseminate market data on Voluntary Sustainability Standards (VSS) across all geographic regions, and is thus an amplification of existing data collection processes for such data of the project partners FiBL, International Trade Centre (ITC), and State of Sustainability Initiatives (SSI). The data will be used to feed into the public ITC database on www.standardsmap.org, and the team will use it to provide aggregate statistics and trends on markets. In 2014, market data on selected crops on a number of VSS was published by Potts et al. (2014), and FiBL contributed the organic data for this report (Willer 2014).

Next global survey on organic agriculture

The next global organic survey will start in mid-2015. We would be very grateful if data could be sent to us, but we will of course also contact all experts. Should you notice any errors regarding the statistical data in this volume, please let us know; we will then correct the information in our database and provide the corrected data in the 2016 edition of "The World of Organic Agriculture." Corrections will also be posted at www.organic-world.net.

Contact

Julia Lernoud and Helga Willer, Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Switzerland, e-mail julia.lernoud@fibl.org and helga.willer@fibl.org.

Further reading

Gerrard, C.L. et al. (2014) D6.7 Report on the experience of conducting the case studies. The Organic Research Centre, Elm Farm, UK-Newbury

IFOAM (2014): The IFOAM norms for organic production and processing. Version 2014. IFOAM, Bonn. http://www.ifoam.bio/sites/default/files/ifoam_norms_version_july_2014.pdf

Potts, J. et al. (Eds.) The State of Sustainability Initiatives Review 2014. Standards and the Green Economy. 1 edition. International Institute for Sustainable Development (IISD) and International Institute for Environment and Development (IIED), Winnipeg and London. Available at http://www.iisd.org/pdf/2014/ssi_2014.pdf

Pugliese, P., Bteich, M.R. and Al-Bitar, L. (Eds.) (2014) Mediterranean Organic Agriculture key Features, recent Facts, latest Figures Report 2014. Mediterranean Organic Agriculture Network (MOAN), CIHEAM Bari. http://moan.iamb.it/index.php?option=com_phocadownload&view=category&id=8&Itemid=94

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The Global Market for Organic Food & Drink

The Global Market for Organic Food & Drink[1]

AMARJIT SAHOTA[2]

Introduction

Global sales of organic food and drink reached US 72 billion US dollars[3] in 2013.[4] As shown in Figure 45, revenues have increased almost five-fold since 1999. Organic product sales have increased at a healthy rate over the last decade. After the financial crisis in 2008, growth in some country markets was sluggish; however, growth has continued at the international level. Organic Monitor predicts healthy growth to continue in the coming years, however many challenges lie ahead (see the last section).

Growth of the global market for organic food and drink 1999-2013
Source: Organic Monitor

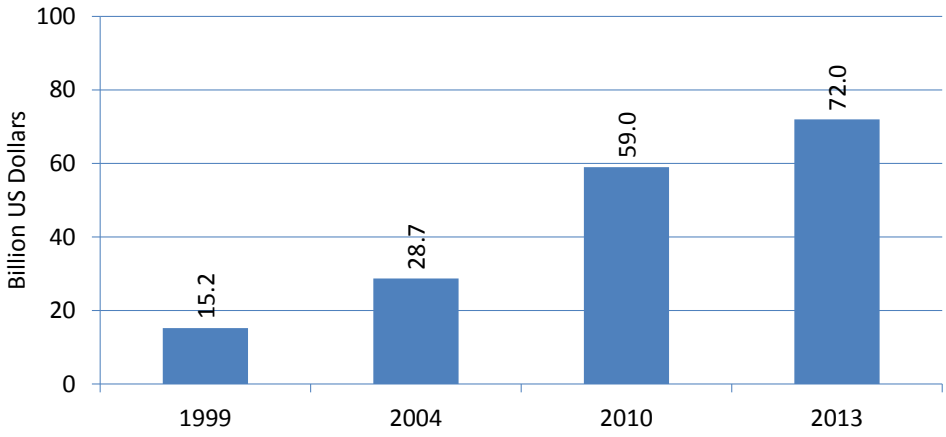

Figure 45: Growth of the global market for organic food and drink, 1999-2013
Source: The Global Market for Organic Food & Drink (Organic Monitor). Note: All figures are rounded

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[2] Amarjit Sahota is the president of Organic Monitor, a specialist research, consulting & training firm that focuses on global sustainable product industries. More details are on www.organicmonitor.com

Contact: Amarjit Sahota, Organic Monitor, 20B The Mall, London W5 2PJ, UK, Tel: (44) 20 8567 0788, E-mail: postmaster@organicmonitor.com

[3] 1 Euro was 1.3281 US dollars in 2013 according to the Central European Bank.

[4] Global market size is slightly higher than previous years because of fluctuations in exchange rate (EUR: USD) and revisions of market data.

Europe

With much of Europe still recovering from the debt crisis, country markets are showing mixed growth rates. Some countries, such as Germany, France, the Netherlands and Finland, continue to report healthy organic food sales growth. Others, such as Spain, the UK, and Greece, are showing sluggish or minimal growth.

European organic food and drink sales reached 31 billion US dollars in 2013. Germany has the largest market for organic products, with retail sales close to 10 billion US dollars. The highest market share for organic foods is however in Denmark, Switzerland, and Austria; above 6 percent. At the European level, organic products comprise about 1 percent of total food sales.

Consolidation is continuing in the European organic food industry. The Dutch company Royal Wessanen continues to expand across Europe by acquisitions. In 2013, it purchased the French organic and fair trade food company Alter Eco. It later acquired the Italian organic beverage firm Abafoods.

Retailer private labels are highly successful in Europe. The food retailer Coop Switzerland is the market leader in the Swiss market; its private label products generate over half of organic food sales in the country. The Ånglamark private label of Coop Denmark also generates about half of organic food sales in Denmark. Discounters in Germany have arguably had the most impact with private labels; organic food products in hard discounters are at lower prices than conventional products in supermarkets.

North America

The North American organic food and drink market was valued at 35 billion US dollars in 2013. Healthy market growth rates are continuing in the USA and Canada, with the market share of organic products at about 4 percent of total food sales.

Demand for organic foods continues to outpace supply, with many sectors continuing to experience undersupply. The organic fruits, vegetables, meat and dairy sectors are some of the sectors showing product shortages. Imports are coming in from various regions to meet the shortfall in demand.

Large food companies and retailers are a feature of the competitive landscape in North America. Like Europe, consolidation is occurring with large companies 'buying' market share. General Mills strengthened its market position by acquiring the natural & organic food company Annie's for 820 million US dollars in September 2014. The American food company had previously bought the Cascadian Farms and Muir Glen brands from Small Planet Foods. WhiteWave Foods diversified from organic dairy and non-dairy products to fresh produce by acquiring Earthbound Farm in 2013. Whitewave Foods itself was created by the merger of Whitewave and Horizon Dairy in 2004.

All leading food retail chains in North America have private labels for organic foods. The O Organics brand of Safeway is the most successful, generating over 700 million US dollars in sales. In Canada, PC Organics of Loblaws is the most popular private label. Wal-Mart is also planning to increase its footprint by marketing organic foods under the Wild Oats brand. About 100 organic products were launched at competitive prices in Wal-Mart stores in spring 2014.

Other Regions

Organic food sales in other regions were about 6 billion US dollars in 2013. Organic foods comprise less than 1 percent of total food sales in the other continents (except Australasia).

Asia

Consumer demand for organic foods is growing in Asia partly because of consumer concerns for food safety. China, in particular, has experienced a large number of food scares. In July 2014, reports came out that several American food operators in China, including McDonald's, KFC, and Subway, were using rotten meat. Previous food scares involved melamine in infant formula and dairy products, sewage oil in food products, contaminated pork and beef, and numerous incidents of adulteration and counterfeiting. This has been a major driver of organic food sales in China. The organic infant formula market, in particular, has shown exponential growth since 2008.

Latin America

Brazil has the largest organic products market in Latin America. Other countries, such as Argentina, Peru, Chile, and Colombia are important producers and exporters. Brazil-based Pao du Azucar is the leading retailer of organic foods in the region.

Australia and New Zealand

Australia and New Zealand have important internal markets for organic products. They are also large producers and exporters, shipping significant volumes of organic beef, lamb, wool, kiwi fruit, wine, apples, pears and vegetables to other regions.

Challenges & growth outlook

The organic products industry has made tremendous strides over the last three decades. Organic agriculture is now practised in the four corners of the globe while organic food sales grew from almost nothing to 72 billion US dollars in 2013. In spite of this significant growth, organic products comprise less than 1 percent of total food sales.

The low market share is a result of concentrated demand – concentrated to regions and even within these regions. Europe and North America generate over 90 percent of global sales. Although Asia, Australasia, Latin America, and Africa have become important producers of organic agricultural crops, their markets for organic products remain small.

Looking closely at Europe and North America, numerous research studies show that a small consumer group is responsible for most organic food sales. Major challenges for the organic products industry are not just to expand production of organic crops, but also to broaden consumer demand for these products.

Another challenge is the growing proliferation of eco-labels in the food industry. Partly because of its early entry, organic remains the dominant eco-label. However, it faces growing competition from other eco-labels. The food industry now has over 200 eco-labels that represent particular environmental, social, and/or production aspects.

Agricultural commodities have the highest adoption rate of eco-labels. Almost 10 percent of all coffee is now produced according to sustainable production methods. More coffee is now sold with UTZ Certified and Rainforest Alliance logos than with organic

symbols. Tea production is following the same route. In parts of Europe like the UK and Switzerland, fair trade banana sales have overtaken organic banana sales. For many of these agricultural commodities, organic certification adoption is lagging behind other sustainability schemes.

Green consumer behaviour is possibly the biggest challenge to future growth. A small group of green consumers represent most organic & sustainable product sales. With this growing array of eco-labels, consumers cannot always distinguish organic symbols from competing symbols and logos. This was affirmed by a study by our company (Organic Monitor) in 2014, in which we asked UK shoppers about what symbols and logos they look for on organic products. Twenty-one percent of respondents stated the Fairtrade logo.

If consumer confusion is a consequence of the growing number of eco-labels, then demand for organic products could suffer. The way forward appears to be clear communication of organic symbols & logos and what they represent.

Fair trade labelled products are highly successful because fair trade has a clear message: certified products give a fair premium to growers in developing countries. Similarly, Non-GMO labels give a clear message that products do not contain any genetically modified organisms. However, organic means different things to different consumer groups. In the US, many consumers buy organic foods because they are perceived to be healthier and more nutritious then conventional foods. In parts of Europe, environmental concerns are the primary purchasing motive. Whereas in China and parts of Asia, organic means high quality and safer food products.

The organic food industry has done tremendously well to grow from almost nothing to 72 billion US dollars within 30 years. Its future growth over the next decade hinges on how the industry meets these challenges.

Standards and Regulations

Standards and Regulations

Beate Huber,[1] Otto Schmid,[2] and Christiane Mannigel[3]

The dominating topic in 2014 in the European Union was the European Commission's proposal for a new organic regulation. The draft, published by the European Commission in March 2014, caused a strong reaction by the organic sector and other related sectors. The dominating opinion was that the planned revision would hinder a sustainable development of the organic sector in Europe. In December 2014, the European Commission finally indicated a change in their approach to a new regulation when the Council backed the organic sector demands. Meanwhile, both the European Union as well as the US continued with their approach for mutual recognition and came to terms for bilateral agreements with South Korea.

Organic legislation worldwide: current situation

According to the FiBL survey on organic rules and regulations, the number of countries with organic standards is 82. Sixteen countries are in the process of drafting legislation. Data on regulations around the world was collected from various authorities and experts. The categorization of regulations as being "not fully implemented" or "fully implemented" was based directly on the feedback from the persons interviewed, and the information was not subject to verification. We received responses from experts and authorities from the majority of the countries. It is assumed that the non-responding countries had not passed legislation on organic production. It should be noted that some countries listed below as having regulations do not enforce them, i.e., the indication "not fully implemented" relates to countries that have only recently adopted legislation and are still in the process of finalizing its implementation, as well as to countries which have adopted legislation but are not providing the resources necessary to implementation.

Table 37 shows the list of countries that do have regulations for organic agriculture or are in the process of drafting them. Please send comments or information on countries that are not listed to Beate Huber (beate.huber@fibl.org).

Some countries have not adopted organic legislation, but they do have national production standards. Such standards provide a national definition of organic products and are a reference point for certification activities. They do not usually foresee adopting a national inspection and certification system, which would be supervised by the government. Table 39 shows that at least eighteen countries, mostly in Asia and Africa, have adopted national standards for organic agriculture.

[1] Beate Huber, Research Institute of Organic Agriculture (FiBL), 5070 Frick, Switzerland, www.fibl.org

[2] Otto Schmid, Research Institute of Organic Agriculture (FiBL), 5070 Frick, Switzerland, www.fibl.org

[3] Christiane Mannigel, Intern at the Research Institute of Organic Agriculture (FiBL), in 2014

Table 37: Countries with regulations on organic agriculture

Remark: Countries highlighted in blue have standards officially endorsed as organic by the International Federation of Organic Agriculture Movements (IFOAM), based on their equivalence with the Common Objectives and Requirements of Organic Standards (COROS, www.ifoam.org/en/coros viewed on 14.01.2015). Both private standards and government regulations are admissible for the IFOAM Family of Standards. See www.ifoam.org/ogs. A list with organic regulations is available at the website of the Organic Trade Association (OTA) at http://www.globalorganictrade.com/country_list.php.

Region	Country	Remark
EU Europe (28)[1]	Austria	Fully implemented
	Belgium	Fully implemented
	Bulgaria	Fully implemented
	Croatia	Fully implemented
	Cyprus	Fully implemented
	Czech Republic	Fully implemented
	Denmark	Fully implemented
	Estonia	Fully implemented
	Finland	Fully implemented
	France	Fully implemented
	Germany	Fully implemented
	Greece	Fully implemented
	Hungary	Fully implemented
	Ireland	Fully implemented
	Italy	Fully implemented
	Latvia	Fully implemented
	Lithuania	Fully implemented
	Luxemburg	Fully implemented
	Malta	Fully implemented
	Poland	Fully implemented
	Portugal	Fully implemented
	Romania	Fully implemented
	Slovak Republic	Fully implemented
	Slovenia	Fully implemented
	Spain	Fully implemented
	Sweden	Fully implemented
	The Netherland	Fully implemented
	United Kingdom	Fully implemented
Non EU Europe (11)	Albania	Fully implemented
	Iceland	Fully implemented
	Kosovo	Not fully implemented
	Macedonia, FYROM	Fully implemented
	Moldova	Fully implemented
	Montenegro	Fully implemented
	Norway	Fully implemented
	Serbia	Fully implemented
	Switzerland[2]	Fully implemented
	Turkey	Fully implemented
	Ukraine	Not fully implemented
Asia & Pacific Region (20)	Armenia	Fully implemented
	Australia	Fully implemented
	Azerbaijan	Not fully implemented
	China	Fully implemented
	Georgia	Fully implemented
	India[3]	Fully implemented
	Indonesia	Fully implemented
	Iran	Fully implemented
	Israel	Fully implemented
	Japan[4]	Fully implemented

[1] eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF
[2] www.admin.ch/ch/d/sr/c910_18.html
[3] www.apeda.gov.in/apedawebsite/organic/index.htm
[4] JAS Standards for organic plants and organic processed foods: www.maff.go.jp/e/jas/specific/organic.html

Region	Country	Remark
	Jordan	Not fully implemented
	Korea, South	Fully implemented
	Lebanon	Fully implemented
	Malaysia	Fully implemented
	New Caledonia	Fully implemented
	New Zealand[1]	Fully implemented
	Philippines	Not fully implemented
	Saudi Arabia	Fully implemented
	Taiwan	Fully implemented
	Thailand[2]	Fully implemented
The Americas & Caribbean (21)		
	Argentina	Fully implemented
	Bolivia	Fully implemented
	Brazil	Fully implemented
	Canada	Fully implemented
	Chile	Fully implemented
	Colombia	Fully implemented
	Costa Rica	Fully implemented
	Cuba	Not fully implemented
	Dominican Republic	Fully implemented
	Ecuador	Fully implemented
	El Salvador	Not fully implemented
	Guatemala	Fully implemented
	Honduras	Fully implemented
	Mexico	Fully implemented
	Nicaragua	Fully implemented
	Panama	Fully implemented
	Paraguay	Fully implemented
	Peru	Fully implemented
	Uruguay	Fully implemented
	USA	Fully implemented
	Venezuela	Not fully implemented
Africa (2)	Morocco	Not fully implemented
	Tunisia	Fully implemented

Source: Survey by Christiane Mannigel and Beate Huber, October 2014 with contributions from Ong Kung Wai, Humus Consultancy, Malaysia

Table 38: Countries in the process of drafting regulations

Region	Country
Europe (3)	Belarus
	Bosnia & Herzegovina
	Russia
Asia and Pacific Region (4)	Jordan
	Kyrgyzstan
	Nepal
	Pakistan
The Americas & Caribbean (2)	Jamaica
	St. Lucia
Africa (7)	Algeria
	Egypt
	Kenya
	Namibia
	Senegal
	South Africa
	Sudan

Source: Survey by Christiane Mannigel and Beate Huber, October 2014 with contributions from Ong Kung Wai, Humus Consultancy, Malaysia

[1] New Zealand Food Safety Authority (NZFSA) Official Assurance Programme for Organic Products: www.foodsafety.govt.nz/industry/sectors/organics
[2] Homepage of the National Bureau of Agricultural Commodity and Food Standards, www.acfs.go.th/eng/index.php

Table 39: Countries with a national standard but without a national legislation

Region	Country
Asia and Pacific Region (13)	Bahrein
	Bhutan
	Brunei
	Hong Kong
	Kuwait
	Kyrgyzstan
	Laos
	Oman
	Qatar
	United Arab Emirates
	Vietnam
Africa (5)	Burkina Faso
	Ghana
	Kenya
	South Africa[1]
	Zambia
	Zimbabwe

Source: Survey by Christiane Mannigel and Beate Huber, October 2014

The Codex Alimentarius Guidelines: Recent developments[2]

The need for clear and harmonized rules has not only been taken up by private bodies, IFOAM, and state authorities, but also by organizations of the United Nations, including the Food and Agriculture Organization (FAO), the World Health Organization (WHO), and the United Nations Conference on Trade and Development (UNCTAD). The Codex Alimentarius Commission approved plant production guidelines in June 1999 and animal production guidelines in July 2001. They also provide guidance to governments in developing national regulations for organic food.

The annex lists of the Codex Alimentarius Guidelines, which define what substances can be used in organic food and farming systems, have been under revision since 2005, with a focus on substances for food processing and criteria for the use of new substances. A working group within the Codex Committee for Food Labeling (CCFL), which was supported by the government of Canada, was appointed for this work. The Codex Commission adopted several amendments to the annex lists that were proposed by the CCFL in July 2009. Other substances discussed, such as nitrites and nitrates, ascorbates for meat processing, and phosphates as food additives, were not approved in the Codex Guidelines for organic food. In 2010, an amendment was made to increase restrictions on the use of rotenone for pest control: the substance should be used in such a way as to prevent it from flowing into waterways.

[1] http://www.afrisco.net/Html/Product_Stardards.htm

[2] Information about Codex Alimentarius is available via www.codexalimentarius.net/web/index_en.jsp.

In 2011 the Codex Committee for Food Labeling agreed on new work (proposed by the EU) on the inclusion of spinosad, copper octanoate, potassium bicarbonate, and uses of ethylene for degreening of citrus for fruit fly prevention and flowering induction in pineapples. In May 2012, the committee decided that "Spinosad should only be used where measures are taken to minimize the risk to non-target species and to minimize the risk of development of resistance." Potassium hydrogen carbonate, copper octanoate (with the same conditions as for other copper products), and ethylene for degreening of citrus for fruit fly prevention and as a flowering agent for pineapples was included in the Annex 2 list of the Codex Guidelines of organically produced food.

In 2011, the Codex Committee for Food Labeling also agreed to re-establish the working group led by the United States, which deals with the revision of the regulation and the list of substances. At the meeting in 2012, a structured approach for a two-year cycle was decided upon.

Furthermore, in 2011 it was agreed to take up organic aquaculture and seaweed production as a new area. A first working paper was presented by the EU. A re-drafted version by the EU was circulated for comments and was discussed at the meeting of the Codex Committee for Food Labeling in May 2012 and May 2013. In October 2014, the CCFL noted that considerable work was still needed to improve the text and agreed to establish a Physical Working Group led by the European Union, working in English, French, and Spanish, to be held immediately prior to the next session to consider comments received, resolve current differences and prepare proposals for consideration at the next session (most likely in spring 2016).

EU regulation on organic production

In 2012, the European Commission decided to review the current legislative and political framework for organic farming. In March 2014, the Commission published a legislative proposal for a new regulation that would result in a complete revision of the legislation. The vast majority of the organic sector, and a lot of the Member States were rejecting the proposed revision, arguing that it would severely hinder sustainable growth of the organic sector in Europe. The political discussion will continue in 2015. It is expected that the complete revision will be dropped, and instead, a revision process will be initiated based on the existing regulation.

Import requirements of major economies

The major import markets for organic products are the European Union, the United States, Canada, and Japan. All of these markets have strict regimes for the importation of organic products. In the European Union, the United States, and Japan, products may only be imported if the certifying agency has been approved by the respective competent authority. Approval of certification bodies requires compliance or equivalency with the requirements of the importing countries, which can be achieved through (a) bilateral agreements between the exporting and the target import country, or (b) direct acceptance of the certifying agency by the target import country.

Bilateral agreements between the exporting and the target import country

Most importing countries, including the United States, the European Union, and Japan have options for bilateral recognition (i.e., the option to confirm that another country's

control system and its standards are in line with domestic requirements and that the products certified in those countries can be sold on the national market). Bilateral agreements are largely political agreements that depend on political will and negotiations between the governments, but are also based on technical assessments.

The United States and the European Union have also recognized each other's national organic standards and control systems, except for animal products from the European Union and apples and pears from the United States, which require extra verification. In addition, products from aquaculture and wine production are not yet included in this agreement. The formal arrangements came into effect in July 2012.

In 2009, the U.S. and Canada concluded their first bilateral agreement. Under a determination of equivalence, producers and processors, who are certified according to the US National Organic Program (NOP)[1] standards by a certifying agent accredited by the US Department of Agriculture, do not have to become certified to the Canada Organic Product Regulation (COPR) standards in order for their products to be represented as organic in Canada. Likewise, Canadian organic products certified to COPR standards may be sold or labelled in the United States as organically produced.[2] The US and Japan subsequently came to an agreement that became effective on January 1, 2014. Canada has signed equivalency agreements with the European Union, Costa Rica, and Switzerland.

The European Union currently recognizes eleven countries[3] as being equivalent with the European Union's system (known as the Third Country list). The European Union further just concluded a bilateral agreement with South Korea. By February 1, 2015, Korea will accept products certified in the European Union as equivalent. The European Union will soon finalize the recognition of the Korean certification for the European Union market.

The US has accepted several foreign governments' accreditation procedures. Certification bodies accredited according to the US requirements by India, Israel, and New Zealand are accepted by the United States Department of Agriculture for certification according to the US National Organic Program (NOP) even though they are not directly accredited by the United States Department of Agriculture. This level of recognition only covers accreditation procedures; the respective certification bodies still have to meet the requirements of NOP to issue certificates accepted by the US.

Acceptance of the certifying agency by the target importing country

The US, the EU, and Japan have options for recognizing certification bodies operating outside of their countries. The technical requirements for achieving such recognition are difficult to meet, and the associated fees are high. Maintaining recognition and/or the necessary accreditation requires substantial financial capacity and personnel from the certification agency.

[1] National Organic Program (NOP) www.ams.usda.gov/AMSv1.0/NOP

[2] There are exemptions to the US COR agreements relating to sodium nitrate, hydroponics and livestock for the US and antibiotics for livestock in Canada.

[3] Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Switzerland, Tunisia and US

Products are only granted import into the European Union if they have been certified by an inspection body or authority recognized by the European Commission.[1] The European Union publishes the list of approved control bodies and authorities recognized for applying equivalent standards and control schemes in non-EU countries in updates to EU regulation 1235/2008. Certification from recognized control bodies has been accepted for imports to the European Union since July 1, 2012. The system of import authorizations has expired in July 2014. The US National Organic Program (NOP) requires all products labelled as organic in the US to meet the US standards (or the terms of an equivalency arrangement such as they have with the European Union, Canada, Korea (since 1.7.2014), Japan, and Taiwan, including imported products. The US system provides for the approval of certification bodies as agents to operate a US certification program. Inspections have to be conducted by inspectors trained in NOP requirements using NOP-based questionnaires, and only certificates issued by certification bodies accredited by the US Department of Agriculture (USDA) are accepted. It is not relevant whether the certification body is based in the US or elsewhere. Nearly 100 agents are currently authorized to certify farms and businesses to the USDA organic regulations. Most USDA-accredited certifying agents are allowed to certify farms and businesses anywhere in the world.

Literature

Commission Regulation (EC) No 1235/2008 of 8 December 2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries; Consolidated version: http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:02008R1235-20140803&from=EN

Commission Implementing Regulation (EU) No 126/2012 of 14 February 2012 amending Regulation (EC) No 889/2008 as regards documentary evidence and amending Regulation (EC) No 1235/2008 as regards the arrangements for imports of organic products from the United States of America

Commission Implementing Regulation (EU) No 508/2012 of 20 June 2012 amending Regulation (EC) No 1235/2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries

Commission Regulation (EC) No 889/2008 of 5 September 2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control; Consolidated Version: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:2008R0889:20130101:EN:PDF

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European Union Group of the International Federation of Organic Agriculture Movements (IFOAM EU Group) (2012) European Organic Regulations (EC) No 834/2007, 889/2008 and 1235/2008. An Evaluation of the First Three Years. Looking for Further Development. IFOAM EU Group, Brussels. Available at http://www.ifoam-eu.org/sites/default/files/page/files/ifoameu_reg_regulation_dossier_201204_en.pdf

[1] There are currently two different lists:

› List of control bodies that apply a control system and production standards equivalent to the EU regulation on organic production (since July 1, 2012).

› List of countries whose system of production complies with rules equivalent to the EU's production and inspection provisions (see EU Regulation 1235/2008).

Websites

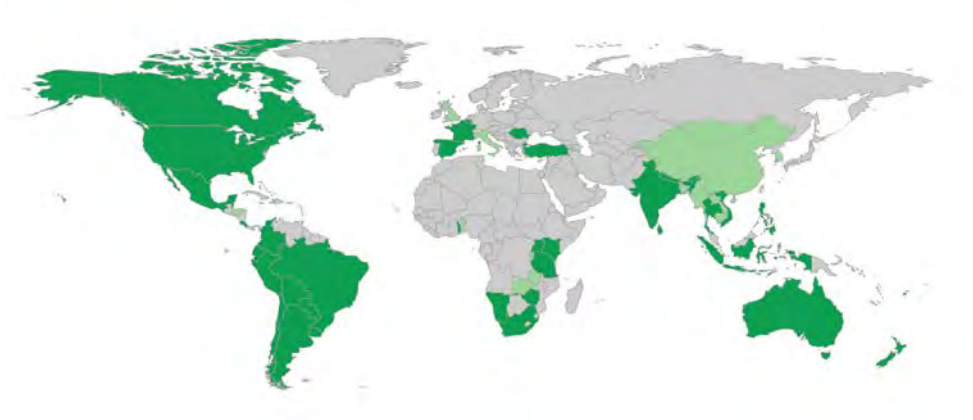
http://www.ifoam.org/fr/value-chain/ifoam-organic-guarantee-system: IFOAM Guarantee system
www.ams.usda.gov/nop/indexIE.htm: Information about the US National Organic Program (NOP)
http://unctad.org/en/Pages/DITC/Trade-and-Environment/Organic-Agriculture.
www.codexalimentarius.net/ download/standards/360/CXG_032e.pdf: The Codex Alimentarius Commission and the FAO/WHO Food Standards Programme: Organically Produced Foods, Rome 2007
ec.europa.eu/agriculture/organic/splash_en: Internet site of the European Commission on organic farming in all European Union languages.

Overview of Participatory Guarantee Systems in 2014

Cornelia Kirchner[1]

Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. They certify producers based on active participation of stakeholders and are built on a foundation of trust, social networks and knowledge exchange (IFOAM definition, 2008).

In 2014, PGS celebrated a jubilee. Ten years have passed since the first "International Workshop on Alternative Certification" in Torres/Brazil in 2004 was organized, and the terminology and conceptual framework for describing what is now known as PGS was developed. The history of PGS is much longer than just ten years. Although it was not called that way, PGS has been used as a way to verify the quality of organic products already before third party certification became the dominant form of certification. The oldest PGS we are aware of is Nature et Progrès in France, who started their PGS activities in 1972. Nevertheless, the 2004 workshop marks an important date for PGS worldwide. Since 2004, there has been a steady growth in the number of new initiatives launched each year. Awareness and recognition of PGS as a viable certification system has increased significantly. Today dozens of successful examples worldwide demonstrate that PGS is a practical alternative to third-party certification and an effective way to develop local markets for organically produced food, particularly appropriate for small-scale farming.



Map 2: Map of PGS by country (Black: countries with operational PGS; Dark grey: countries with PGS under development; Light grey: countries where no data is available)
Source: IFOAM

IFOAM is the only organization compiling global data about PGS through various projects as well as via the Annual PGS Survey, which was first conducted in 2011. Based

[1] Cornelia Kirchner, Program and Value Chain Coordinator at the International Federation of Organic Agriculture Movements (IFOAM - Organics International), Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, c.kirchner@ifoam.org, www.ifoam.org

on the data collected, it is estimated that at least 70 PGS initiatives are now established[1] on all continents, and more than 70 are currently under development. There are 38 countries with operational PGS initiatives and another 17 countries where PGS is currently under development. During 2014, IFOAM identified 32 new PGS initiatives, of which 12 are operational, and 20 are under development. Eight countries newly appeared on the global PGS map: Bangladesh, Cambodia, Fiji, Honduras, Kiribati, Laos, Myanmar, and Togo.

More than just an alternative way to certify organic products

To serve as an affordable alternative to third party certification and as a tool to access and build local organic markets, is a core function of PGS and a main reason for many farmers and other stakeholders to engage in PGS. However, PGS have also other qualities and benefits that are increasingly gaining recognition. There is a growing awareness of the potential for the application of PGS methodology as a tool for improving livelihoods in rural areas and contributing to sustainable development.

In 2014, IFOAM completed the Global Comparative Study on Interactions Between Social Processes and Participatory Guarantee Systems.[2] The main social processes identified among the surveyed PGS were:

- collective marketing;
- sharing information, techniques, and traditional knowledge;
- collective seed management and conservation;
- small scale saving systems;
- collective work;
- committed, informed and supportive consumer base; and
- socialized pricing.

The study showed that PGS are an important platform for the development of these social processes that in turn positively impact PGS initiatives in different ways, thereby improving the sustainability and impacts of the PGS. The study concluded that entry into PGS offers farmers and their families a range of economic, environmental and social benefits, thus improving their livelihoods. It found that PGS has the potential to make a significant contribution to the reduction of food insecurity and to improved nutrition among farmers in rural areas.

PGS worldwide in figures

- It is estimated that over 46‘000 small operators are currently involved in PGS worldwide, of which more than 17‘000 are certified through PGS. This number

[1] The new initiatives identified are categorized as operational or under development based on declarations provided by the corresponding contact persons. Not all of them have provided figures on the number of producers involved or certified, which will be ascertained in the course of the coming year.

[2] Funding for this study was provided by the AGROECO project, which is carried out by the Universidad Nacional Agraria La Molina UNALM (Peru), the Sociedad Peruana de Derecho Ambiental SPDA (Peru) and the University of British Columbia, UBC (Canada) under the Canadian International Food Security Research Fund (CIFSRF), financed by the International Development Research Center (IDRC), and the Department of Foreign Affairs, Trade and Development Canada (DFATD). AGROECO project: www.lamolina.edu.pe/hortalizas/Agroeco.htm

includes mostly small farmers and a few small processors.

- It is estimated that 38 countries worldwide have functional PGS initiatives in place. Additionally at least in 17 more countries PGS is currently under development.
- The leading countries in terms of producers involved in PGS are the Philippines (10'620), Uganda (6'436) and India (5'977). Bolivia, Brazil, and South Africa also play an important role with more than 3'000 farmers involved in each country.
- Of the numbers of producers involved, only a certain percentage are already certified. This shows the growth trend of the PGS movement, as more and more producers are getting involved and going through conversion or the PGS set-up process. India accounts for the most producers certified through PGS (5'191) followed by Brazil (2'771), Peru (2'000) and Bolivia (1'310).
- Asia is the leading region with 19'094 producers involved, 7'234 of which are certified. Africa is a region of very recent and rapid PGS development: it is estimated that 13'079 producers are involved, 1'373 of whom are certified. In Latin America and the Caribbean, 12'485 producers are involved in PGS, 6'853 of whom are certified.
- Due to an unfavorable legal framework, PGS initiatives are less widespread in North America and Europe. In North America, a total of 1'051 producers are involved in PGS; most of them are in the United States (1'034). A total of 832 producers are certified, 816 in the US and 16 in Canada. In Europe, France is the leading country with 708 producers certified. In 6 other European countries, we find PGS initiatives with a small number of producers involved. The total number of producers involved in Europe is 816.
- In Oceania, more than 350 producers are involved spread over seven countries (including French territory). A total of 278 are certified; most of them are based in New Zealand.
- It is estimated that PGS certified producers are currently managing organically a total of at least 49'803 hectares of agricultural land. The leading countries, on which data is available, are as follows:
    - Namibia: 23'022 hectares (most of it extensive grassland),
    - United States: 8'840 hectares,
    - India 6'442 hectares,
    - Mexico: 3'000 hectares,
    - Bolivia: 2'460 hectares,
    - Australia: 2'200 hectares, and
    - Brazil: 1'493 hectares.

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Bouagnimbeck, H. 2014. The Global Comparative Study on Interactions Between Social Processes and Participatory Guarantee Systems. IFOAM, Bonn. Available online at: http://www.ifoam.org/sites/default/files/global_study_on_interactions_between_social_processes_and_participatory_guarantee_systems.pdf

The Organic Market Framework: Becoming Organic 3.0[1]

David Gould[2]

A rationale for metamorphosis

In the big world of agriculture, agricultural products, and their markets, the organic world is still a little mouse, a niche market. Despite all of the gains and recognitions made over the past decades, the available statistics show that it is a tiny percentage of the world's production. Clearly, there is a long way to go to have the desired impact: to be the mainstream choice for agriculture, the foundation on which further society's sustainability efforts are built.

It is, however, widely acknowledged that there are large numbers of farmers (especially smallholders in developing countries), who use organic methods; they go uncounted, unrecognized – and often unrewarded – simply because they are not certified. Certification is a barrier for many smallholders, who may see it as too expensive, too bureaucratic, too time consuming, or otherwise not practical or necessary. Participatory Guarantee Systems are one solution to this, but there are others. And beyond those who already practice using organic or agroecological methods, the organic movement aspires to enable non-organic producers to convert their practices closer to organic, and to embody an attitude of continual improvement toward best practices by all practitioners.

As a movement, the organic world needs to escape the limited perception that organic equates with certification. The Principles of Organic Agriculture make no such distinction. Ultimately, if the goal of widespread organic production as the predominant practice is achieved, the need for certification will fade into history. This widespread adoption of organic practices was part of the original vision of our movement's founders and continues to be. Those founders – people like Rudolph Steiner, Sir Albert Howard, J.I. Rodale, Masanobu Fukuoka, Bhaskar Save, and others – were our progenitors, who established what we could call "Organic 1.0" – the foundation and original phase of the organic movement.

The movement has moved beyond Organic 1.0, and now exists in "Organic 2.0" – a world where the organic market is a growing force – heavily regulated by both public and private sectors through hundreds of certification bodies, with an increasing market share and raised societal awareness – but it is still like a little mouse. Organic wants to be more like the elephant. A mouse and an elephant are both mammals, but you can never make a mouse as big as an elephant; the structure of the animal needs to be different; a mouse as big as an elephant is a structure that cannot support itself; it would crumble under its own weight.

Such is the challenge now facing the organic movement. To move from Organic 2.0 to "Organic 3.0" – where organic is the mainstream choice but also its leading edge, where

[1] Note: This article does not represent the official position of the International Federation of Organic Agriculture Movements (IFOAM - Organics International) or the Sustainable Organic Agriculture Action Network (SOAAN), but rather the exploratory ideas of part of the think tank they have convened.

[2] David Gould, IFOAM Value Chain Facilitator, International Federation of Organic Agriculture Movements (IFOAM Organics International), Charles-de-Gaulle Strasse 5, 53113 Bonn, Germany, www.ifoam.org

it is an inclusive accessible paradigm that serves as the basis for further improvements, where "organic" comes to be equated with what is truly "sustainable" – the organic community needs to a imagine a different system and framework. This new system has both a content part (i.e., broadening the scope of the organic claim to fully embrace the Principles) as well as a methodology part, i.e., how claims can be readily communicated in a credible way that is appropriate in any given market conditions, from local direct sales to international trade. These all need some kind of credible guarantee, so the consumers get what they are expecting, but the way that happens does not have to be the same for all operations.

Paradigm shift to a compatible methodology

In terms of production, the organic paradigm is qualitatively different from the dominant conventional paradigm. This has always been the case. However, in terms of the market guarantee methodology, the organic system has not developed a compatible paradigm. Instead, we have used the conventional paradigm. It is time for a shift.

Back when organic started getting more market attention in the 1980s and early 1990s, the organic sector saw the need to legitimize itself to a conventional paradigm and marketplace. The understandable path the organic sector took was to adopt the existing assurance paradigm. They adopted the ISO model, and in many respects it helped improve certain types of assurance practices. Their strategy succeeded – organic has come to be taken as a serious market presence and opportunity by the big market players. It has arrived at a level of Organic 2.0 that is burgeoning to the point where it is hard pressed to handle the load, with corresponding increasing problems of fraud, more bureaucracy, less flexibility, reactionary moves to require more laboratory testing, etc.

Although still the mouse, it is not a mouse in danger of dying – quite the opposite. It is gaining strength, so much so that there is the opportunity to exert itself in a new way. It is an opportunity to create a new market assurance framework that befits its own paradigm. Not only is this an opportunity to create a more facile and credible market framework, it is at the same time an opportunity to communicate more fully what the Principles of Organic Agriculture really mean for all of society.

The ISO paradigm is based on a supply chain model. Each link in the chain takes care of itself and is responsible as an island in a stream. Each link is responsible only for itself. The Principles of Organic Agriculture speak of a different approach, namely a value chain model. In a value chain model, the Principle of Fairness is manifest as a recognized interdependence among actors in the chain, where each actor (including the consumer) helps ensure the economic viability of the other links, a decent livelihood, and long-term sustainability of the ecosystem. The ISO model requires strict attention to avoidance of conflict of interest, with an aim at an impartial, non-corrupt decision; it requires separation of functions to help ensure this result. And while fair decisions are ostensibly what everybody wants, these ISO requirements impose unnecessary constraints on organic systems, resulting in (among other things) bottlenecks in the process.

In fact, some of the problems with the ISO model and the concomitant challenges the organic market faces, such as fraud, lack of confidence in certification systems, and the backlash toward more testing, etc., stem from the inherently flawed model that it is – at least for a process-based claim dealing largely with the behaviors and practices of people.

I pay you to certify me – an inherent conflict of interest that confounds the norm from the start. Instead, a methodology compatible with the Principles would demand a focus on common interest, and transparency that would enable stakeholders to monitor for any deviations from unfair decisions or false claims. This would enable more people to participate in and/or be informed about the whole process that connects consumers with the ecosystems on which they depend. Moves in organic regulations to require more analytical testing put the penalty of contamination onto organic producers, even though it is most often not their fault. This undermines all four of the Principles. Transparency about pollution of organic goods and who the polluters are, fairness about who pays the cost of discovery and clean-up, and open societal discussion about what should be done about it are the orientation of a progressive society.

For the foreseeable future, there will be a critical need for credible market guarantees. Last year's article in this space discussed many of the new approaches and tools that could support the foundational shift in approach being discussed here (Gould 2014). The organic movement sees the need to overlay on these tools the appropriate framework concepts (such as described above) that reflect the movement's mission as explained by the Principles.

Brave new world

For the organic approach to really become the mainstream's choice, the movement is going to need more than a change in its methodological approach. It must also broaden the spectrum of practice considerations to take into account the apex challenges of our time, like climate change, energy, non-renewable resources, cradle-to-cradle waste recovery, and human and cultural rights (Gould 2014) The organic movement must also come to grips with the growing population bent on consuming more animal protein, both per capita and in absolute quantity worldwide – a population living increasingly in urban centers. Aquaculture is the fastest growing sector of animal protein production in the world. More and more urban farming is happening based on compost, in greenhouses, on rooftops – constructed soils not necessarily connected to the pedosphere – which makes them subject to disqualification as organic according to some standards (including those of the International Federation of Organic Agriculture Movements - IFOAM). How "less organic" are they? How do they or do they not heed the Principles of Organic Agriculture in a complex world that is far less perfect than the Garden of Eden?

With some thoughtful discussion, there are likely answers to the relevant technical questions and a way to harmonize with the Principles. There are options for expanding market guarantee methods. But under the complexity of organic regulatory frameworks that exists in our Organic 2.0 world, it is unclear how fast change under the current regulatory regime can occur to make Organic 3.0 the new reality. Enabling market access and assurance methodologies to be inclusive: of all the organic-but-not-certified producers, the organic farmers who identify as agroecological farmers instead of as organic farmers, the permaculturists, and all the others who fall under the IFOAM understanding of the organic sphere, not to mention newer areas like aquaculture and urban agricultural systems, is a big challenge. The organic sector finds itself a bit "stuck" with a word – organic, biologique, ecológico, or whatever the regulated analog in other

languages is – with so much legal meaning attached to it that facilitating change faces some complex hurdles.

IFOAM and the Sustainable Organic Agriculture Action Network (SOAAN)[1] are embarking on a process to re-create the market access framework in terms of both content and methodology. Included is a stakeholder engagement strategy to enable participation of both the public and private sector and effect a transition over the coming decade to a revised framework that reflects the vision of Organic 3.0. Making that vision tangible and useful will require innovation. To give an idea of what Organic 3.0 will be, add to the mouse-and-elephant metaphor with that of the butterfly: the larva (Organic 2.0) spins its cocoon and undergoes a transformation into a completely different looking creature. We are entering the phase of metamorphosis. Organic 3.0 will look as different from Organic 2.0 as the butterfly does from the caterpillar.

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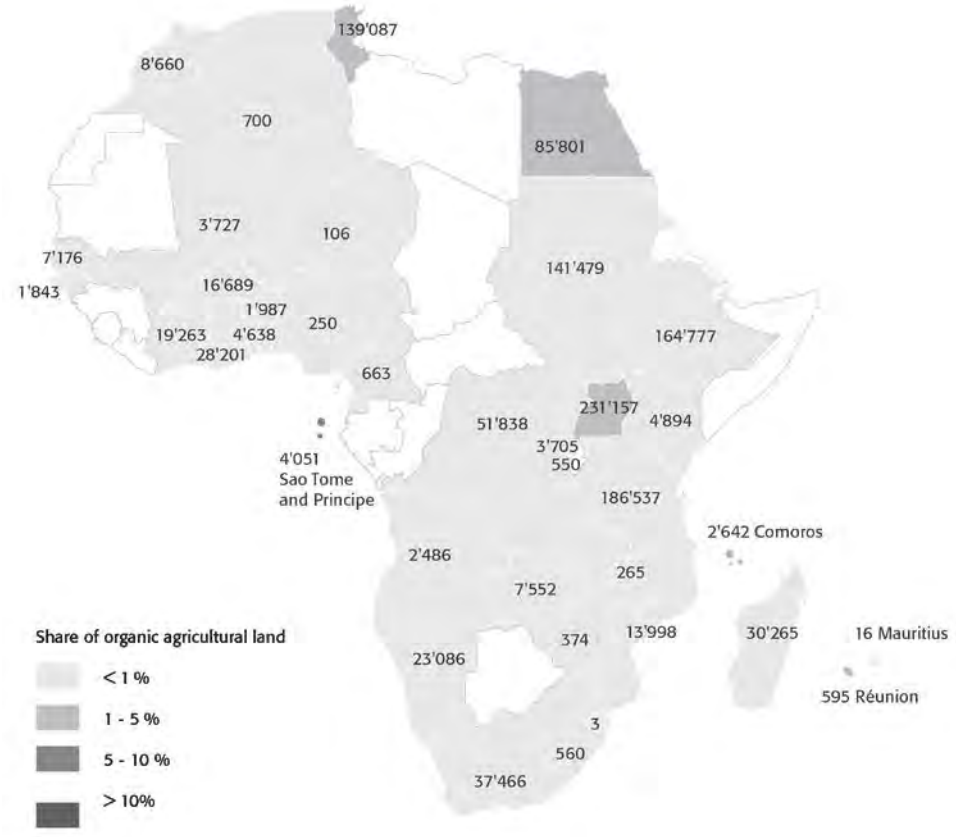
[1] SOAAN is the Sustainable Organic Agriculture Action Network – see http://www.ifoam.org/en/sustainable-organic-agriculture-action-network-soaan.

Africa



Map 3: Organic agricultural land in the countries of Africa 2013

Source: FiBL-IFOAM Survey 2015; based on information from the private sector, certifiers, governments and, for North Africa, the Mediterranean Organic Agriculture Network (MOAN). For detailed data sources see annex, page 281.

Latest Developments in Organic Agriculture in Africa

JORDAN GAMA[1]

Organic agriculture in Africa is gaining momentum. There is a growing recognition among policy makers that organic agriculture has a significant role to play in addressing food insecurity, land degradation, poverty, and climate change in Africa. It offers a valuable tool-kit of affordable and people-centered production practices, as well as high-yielding systems and both local- and export-focused marketing models. In the context of low carbon, resilient and inclusive sustainable development, organic agriculture is an increasingly relevant and attractive proposition for many stakeholders.

The International Federation of Organic Agriculture Movements (IFOAM) is currently working with the African organic sector, African Union, and other agencies in the framework of its "Organic Alternative for Africa Initiative" to facilitate the integration of organic agriculture into the core of African policies and the agricultural development agenda, including the Comprehensive African Agriculture Development Programme (CAADP)[2]. The Organic Alternative for Africa is aimed at identifying, promoting, and nurturing the uptake of organic agriculture practices, systems, markets, and policies in the context of sustainable development and poverty eradication. Therefore, IFOAM works with many stakeholders, both within the organic movement and, just as importantly, outside it to help create opportunities and facilitate the growth of organic agriculture-based development throughout the continent.

The African Organic Network

We reported significant breakthroughs achieved in 2013 in the institutionalization of the African Organic Network (AfrONet)[3], the umbrella organization established during the Second African Organic Conference to unite and represent African ecological/organic stakeholders (Bouagnimbeck and Gama 2014). Below is an overview of the key achievements in the development of this important body for the future of the African organic movement and sector:

– Strengthening and supporting regional networks, activities the Ecological Organic Agriculture Initiative for Africa,[4] and organic conferences in Eastern, Western, Central and Southern Africa is underway. In Southern Africa, the Southern African Network for Organic Development (SANOD) and IFOAM's Southern African Network (ISAN)[5] are formed to unite the stakeholders and further develop the organic agriculture in the region. A successful Western African organic conference

[1] Jordan Gama, President AfrONet, Tanzanian Organic Network (TOAM), Dar es Salaam, Tanzania, africanorganicnetwork.org/ct-menu-item-3

[2] Information on CAADP, the Comprehensive African Agriculture Development Programme, is available at www.nepad-caadp.net. The report "The Potential Contribution of Organic Agriculture to the Realization of the Objectives of the CAADP – A Guide for Stakeholders" is available at www.ifoam.org/en/osea-ii-project

[3] Information about AfrONet is available at africanorganicnetwork.org.

[4] The aim of EOA, the Ecological Organic Agriculture Initiative for Africa is to mainstream Ecological Organic Agriculture into national agricultural production systems by 2025 in order to improve agricultural productivity, food security, access to markets, and sustainable development in Africa. It promotes ecologically sound strategies and practices among diverse stakeholders in production, processing, marketing and policy making to safeguard the environment, improve livelihoods, alleviate poverty and guarantee food security.

[5] For more information see www.ifoam.org/es/regional-activities/isan-ifoam-southern-african-network

was held in Benin in August 2014.[1] It marked a significant milestone for mainstreaming EOA in regional and member countries' policies, strategies, and programmes.

- The organization has been officially registered, and the office was opened in Tanzania with a part-time information and communication officer, and a finance manager hired in 2014.
- A profile of organizations, networks, and programs related to ecological/organic farming on the continent has been compiled and updated.
- Partnerships and active participation in the events of the Forum for Agricultural Research in Africa (FARA)[2] and at the Organic World Congress of (IFOAM), as well as with projects such as the Productivity and Profitability of Organic and Conventional Farming Systems[3] (ProEcoOrganicAfrica), PROGROV.
- AfrONet has a permanent seat in the Continental and Regional/Cluster Steering Committees of Ecological Organic Agriculture. The preparation of the third African Organic Conference, to be held in 2015 in Nigeria, is progressing well.

In collaboration with the African Union Commission (AUC), training on organic standards and certification is provided to stakeholders in the member countries of the Southern African Development Community (SADC, www.sadc.int), the Common Market for Eastern and Southern Africa (COMESA. www.comesa.int), the Economic Community of West African States (ECOWAS, www.ecowas.int), and the East African Community (EAC, www.eac.int). Furthermore, the Kasisi training centre in Zambia has been identified by AUC as one of the satellite centres for organic training on the continent. The continent-wide Organic Product Standard for Africa has been approved by the African Union Commission (AUC).

Preparation for the Third African Organic Conference 2015 in Nigeria

In partnership with the steering committee of EOA, the Ecological Organic Agriculture Initiative for Africa, AfrONet is leading the multi-stakeholder organizing committee of the Third African Organic Conference, to take place in 2015 in Nigeria. So far, a conference flyer and the conference announcement have been issued. The African Union has confirmed participation and conference support. IFOAM, the International Society of Organic Agriculture Research (ISOFAR), the Nigerian government and others are supportive of the conference and are actively taking part in its organization.

The organic world and like-minded organizations, including the Alliance for Food Sovereignty in Africa (AFSA) and development partners, are encouraged to actively participate and support the conference.

The Productivity and Profitability of Organic and Conventional Farming Systems (ProEcoOrganicAfrica) project

A successful ProEcoOrganicAfrica project stakeholder workshop was held in Kenya in 2014. The ProEcoOrganicAfrica project (www.ProEcoAfrica.net) is implemented within the frame of 3.5 years (July 2013 to December 2016). It will work toward improving

[1] More information is available at http://www.eoa-africa.org/news/the-eoa-west-africa-conference-underway/.
[2] Information about FARA is available here http://www.fara-africa.org/
[3] Information about the ProEcoOrganicAfrica is available at www.ProEcoAfrica.net

rural livelihoods in Ghana and Kenya, including food supply, nutrition, and income security, through climate-smart ecological intensification of agricultural systems.

Under the coordination of the Research Institute of Organic Agriculture (FiBL), and with the financial support of the Dutch Humanist Institute for Cooperation (Hivos) and the Swiss Development Cooperation (SDC), ProEcoOrganicAfrica intends to generate scientific evidence and knowledge on the productivity, profitability, and sustainability of ecological organic agriculture (EOA) in Ghana and Kenya. Sound conclusions and recommendations will be drawn on the potential of EOA to help farmers, especially women, to be economically successful and resilient against the adverse impacts of climate change and socio-economic challenges. Capacity building, networking, and a conducive policy environment will be promoted for effective and efficient sharing and exchange of knowledge/experiences in order to enhance agronomic and scientific expertise. The findings will help decision-making by farmers, extension agents, and managers from public and private institutions, investors, and policy-makers.

IFOAM is responsible for leading the implementation of the policy- and advocacy-related activities in collaboration with the project government partners in Ghana (Ministry of Food and Agriculture – MOFA) and Kenya (Kenya Agricultural Research Institute – KARI), as well as FiBL. Other implementing partners include the University of Ghana, Agro-Eco Louis Bolk Institute from the Netherlands, and the International Centre for Insect Physiology and Ecology (icipe).

Outlook

There is undoubtedly room for a substantial increase in organic production in Africa, with the potential for millions of smallholder farmers and their families to move out of poverty and hunger and enjoy a better quality of life. The fact that traditional African agriculture is low external input provides a potential basis upon which organic agriculture can enhance the productivity, resilience, and profitability of smallholder farming. It is, therefore, an ideal development option for Africa. Organic farming practices deliberately integrate traditional farming methods and use of affordable, locally available resources. As such, they are highly relevant to a majority of African farmers. Therefore, the necessary intensification of agricultural production in Africa can and should be ecological, maintain ecosystem services, and be based on restoring, building, and maintaining the natural resource base, particularly soil, water, and biodiversity. Therefore, local communities, farmers, and their sustainable practices need to be supported and enhanced so that the potential benefits of improved agricultural systems, based on the principles of organic agriculture, can be unleashed and disseminated throughout the continent.

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Africa: Current Statistics

JULIA LERNOUD[1], HELGA WILLER[2] AND BERNHARD SCHLATTER[3]

The organic agricultural land in Africa has increased by almost 78'000 hectares or 7 percent compared to 2012. There were 1.2 million hectares of agricultural land in 2013, which is 0.2 percent of the continent's total agricultural area and almost 3 percent of the global organic agricultural area. In 2013, 39 countries reported data on organic farming. The area of organic agricultural land has increased by more than 1 million hectares from the 52'000 hectares in 2000. Uganda is the country with the largest organic area, with more than 230'000 hectares and with the largest number of organic producers. The country with the highest proportion of organic agricultural land is the island state Sao Tome and Principe with 7.2 percent of its agricultural area being organic, followed by Egypt with 2.3 percent and Comoros with 1.7 percent.

Land use

Land use details were available for almost three-quarters of the organic agricultural land. In 2013, 47 percent of all organic farmland was used for permanent crops (almost 568'000 hectares), 19 percent was used for arable crops (237'000 hectares), and five percent (64'000 hectares) was grassland/grazing area. Ethiopia (147'000 hectares), Tunisia (137'000 hectares), and the United Republic of Tanzania (almost 128'000 hectares) have the largest *permanent crop areas*. The key permanent crop is coffee, amounting to 194'500 hectares in total. As no crop details were available for some of the biggest African coffee producers, it can be assumed that the total figure for organic coffee is higher. The largest organic coffee areas are in Ethiopia and Tanzania. Nineteen percent of the organic farmland was used for *arable crops*, most of which are oilseeds (almost 126'000 hectares) and textile crops (64'000 hectares), and aromatic and medicinal plants. Aromatic and medicinal plants were grown on almost 23'000 hectares in 2013; the key producing countries were the United Republic of Tanzania (10'000 hectares), Madagascar (almost 5'000 hectares), and Morocco (more than 2'000 hectares). It should be noticed that an important increase of the oilseed area took place in 2013, due to a large area of peanuts reported in Sudan.

Producers

There are more than 574'000 organic producers in Africa. The countries with the most organic producers are Uganda (189'000), the United Republic of Tanzania (148'000), and Ethiopia (134'000). It can be assumed that the number of producers is higher because some countries only report the number of farm enterprises/companies.

Wild collection

Wild collection has an important role in Africa, with more than 10 million hectares certified as organic. Zambia is the country with the largest beekeeping area with 6 million hectares, followed by Namibia (2.4 million hectares), and Morocco (817'000 hectares). Medicinal plants such as devil's claw (*Harpagophytum procumbens*) play the most important role in wild collection.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Africa: Graphs

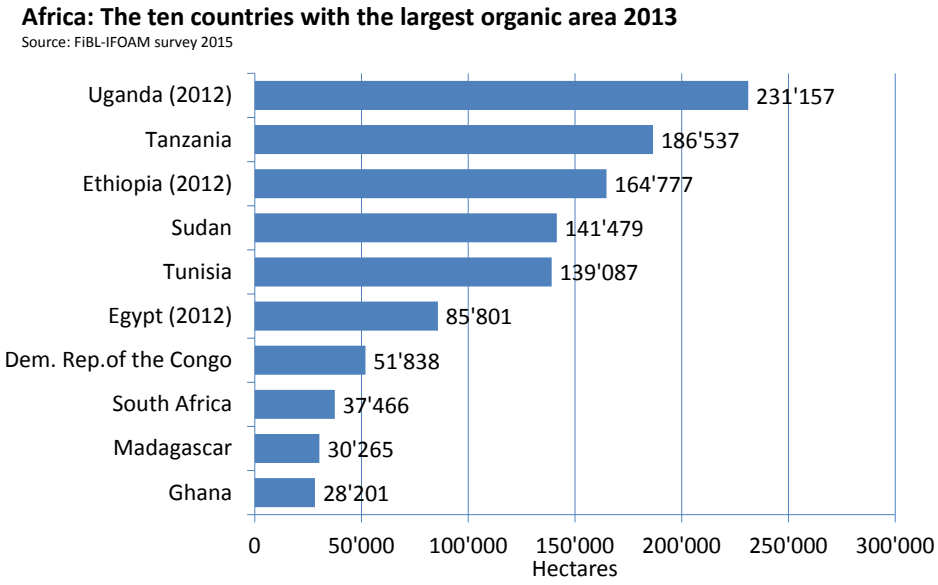

Figure 46: Africa: The ten countries with the largest organic agricultural area 2013

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

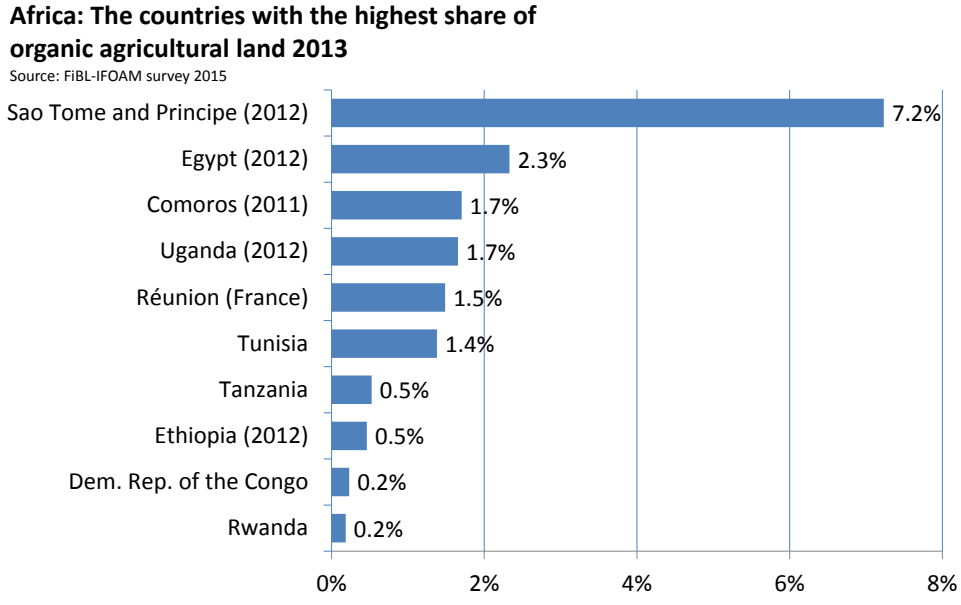

Figure 47: Africa: The countries with the highest share of organic agricultural land 2013

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

Africa: Development of organic agricultural land 2000 to 2013

Source: FiBL-IFOAM-SOEL 2001-2015

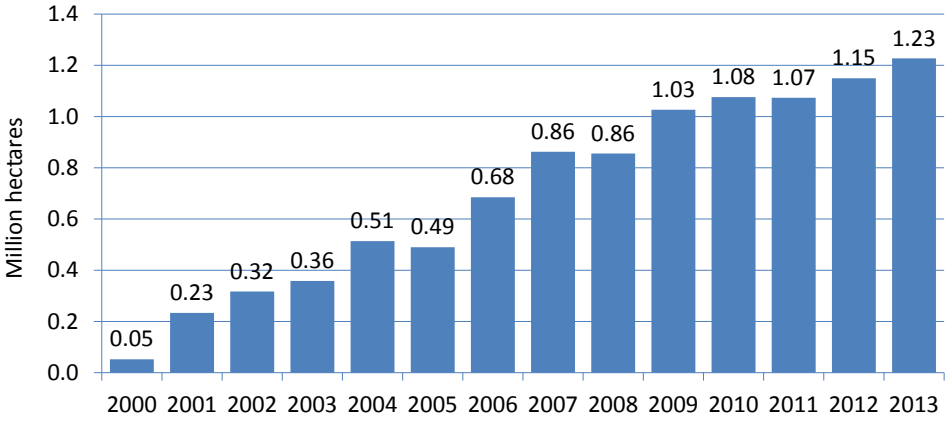

Figure 48: Africa: Development of organic agricultural land 2000 to 2013

Source: FiBL-IFOAM-SOEL-surveys 2000-2015

Africa: Use of organic agricultural land 2013

Source: FiBL-IFOAM Survey 2015; based on information from the private sector, certifiers, and governments.

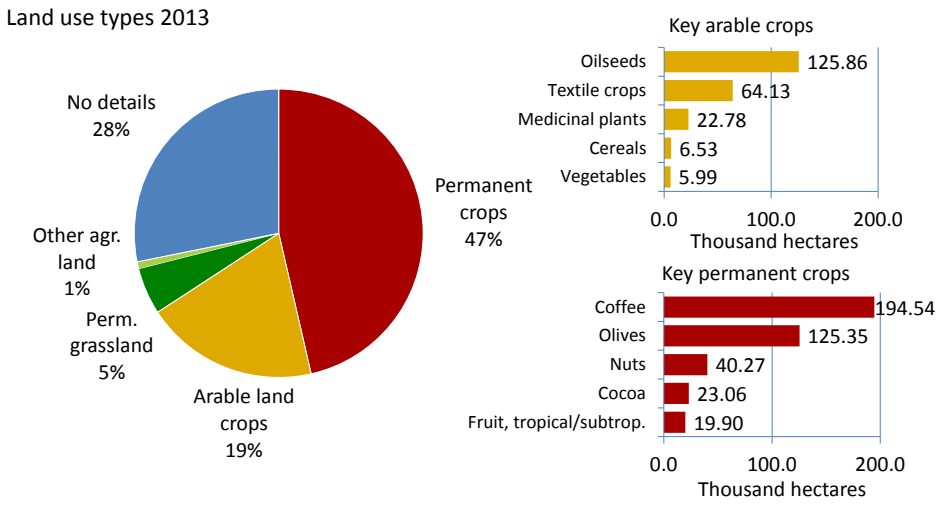

Figure 49: Africa: Use of agricultural land 2013

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

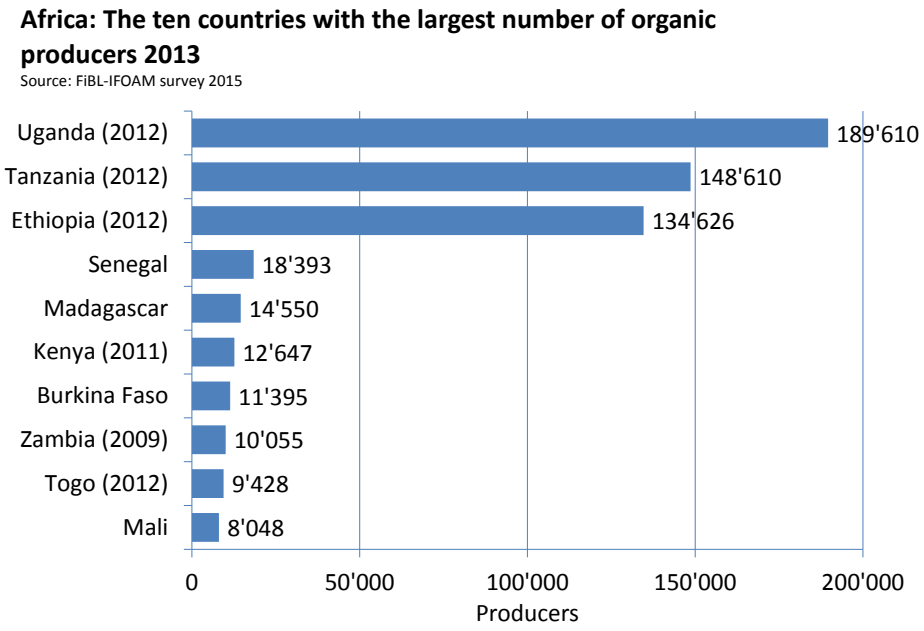

Figure 50: Africa: The ten countries with the largest number of organic producers 2013

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

Organic Agriculture in Africa: Tables

Table 40: Africa: Organic agricultural land, share of total agricultural land and number of organic producers 2013

Country	Area [ha]	Share of total agr. land [%]	Producers[1]
Algeria	700	0.002%	57
Angola	2'486	0.004%	
Benin	1'987	0.06%	2'355
Burkina Faso	16'689	0.14%	11'395
Burundi	550	0.03%	36
Cameroon	663	0.01%	88
Chad		Wild collection only	
Comoros	2'642	1.70%	1'416
Côte d'Ivoire	19'263	0.09%	277
Democratic Republic of the Congo	51'838	0.23%	1'123
Egypt	85'801	2.33%	790
Ethiopia	164'777	0.46%	134'626
Ghana	28'201	0.18%	1'915
Guinea-Bissau	1'843	0.11%	
Kenya	4'894	0.02%	12'647
Lesotho	560	0.02%	2
Madagascar	30'265	0.07%	14'550
Malawi	265	0.005%	
Mali	3'727	0.01%	8'048
Mauritius	16	0.02%	3
Mayotte	5	-	2
Morocco	8'660	0.03%	120
Mozambique	13'998	0.03%	5
Namibia	23'086	0.06%	12
Niger	106	0.0002%	
Nigeria	250	0.0003%	80
Réunion (France)	595	1.49%	144
Rwanda	3'705	0.19%	876
Sao Tome and Principe	4'051	7.23%	2'180
Senegal	7'176	0.08%	18'393
South Africa	37'466	0.04%	250
Sudan	141'479	0.10%	222
Swaziland	3	0.0003%	
Tanzania	186'537	0.53%	148'610
Togo	4'638	0.14%	9'428
Tunisia	139'087	1.38%	2'810
Uganda	231'157	1.66%	189'610
Zambia	7'552	0.03%	10'055
Zimbabwe	374	0.002%	2'000
Total	**1'227'088**	**0.12%**	**574'129**

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

[1] Some countries report only the numbers of companies, projects or grower groups, which may each comprise a number of producers. See also explanations on page 58.

Table 41: Africa: All organic areas 2013

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Algeria	700				700
Angola	2'486				2'486
Benin	1'987		3'543		5'530
Burkina Faso	16'689		80'018		96'707
Burundi	550				550
Cameroon	663		110'000		110'663
Chad			11'000		11'000
Comoros	2'642		70		2'712
Côte d'Ivoire	19'263		344		19'608
Democratic Republic of the Congo	51'838				51'838
Egypt	85'801				85'801
Ethiopia	164'777		180		164'957
Ghana	28'201		19'813		48'014
Guinea-Bissau	1'843				1'843
Kenya	4'894		130'903		135'797
Lesotho	560		50'000		50'560
Madagascar	30'265		23'711		53'975
Malawi	265				265
Mali	3'727		3'978		7'705
Mauritius	16				16
Mayotte	5				5
Morocco	8'660		817'690		826'350
Mozambique	13'998		31'400		45'398
Namibia	23'086		2'400'000		2'423'086
Niger	106				106
Nigeria	250	150			400
Réunion (France)	595				595
Rwanda	3'705		80		3'784
Sao Tome and Principe	4'051				4'051
Senegal	7'176		22'000		29'176
South Africa	37'466		31'709		69'175
Sudan	141'479		5'000	840'000	986'479
Swaziland	3				3
Tanzania	186'537		15'040		201'577
Togo	4'638		242		4'880
Tunisia	139'087	42'646			181'733
Uganda	231'157		158'328		389'485
Zambia	7'552		6'133'424		6'140'976
Zimbabwe	374		70'000		70'374
Total	**1'227'088**	**42'796**	**10'118'473**	**840'000**	**12'228'358**

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

Table 42: Africa: Land use in organic agriculture 2013

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		340'301
Arable crops	Arable crops, no details	6'486
	Cereals	6'531
	Flowers and ornamental plants	109
	Green fodder from arable land	658
	Medicinal and aromatic plants	22'780
	Oilseeds	125'861
	Protein crops	2'020
	Root crops	490
	Seeds and seedlings	1
	Sugarcane	225
	Textile crops	64'135
	Tobacco	
	Vegetables	5'986
	Arable crops, other	1'938
Arable crops total		*237'219*
Cropland, no details		8'002
Other agricultural land	Fallow land, crop rotation	5'964
	Other agricultural land	640
	Unutilized land	2'914
Other agricultural land total		*9'518*
Permanent crops	Berries	47
	Citrus fruit	9'283
	Cocoa	23'063
	Coconut	7'973
	Coffee	194'544
	Fruit, no details	239
	Fruit, temperate	8'314
	Fruit, tropical and subtropical	19'899
	Grapes	925
	Medicinal and aromatic plants, permanent	15'097
	Nuts	40'270
	Olives	125'350
	Tea/mate, etc.	6'339
	Permanent crops, other	116'292
Permanent crops total		*567'634*
Permanent grassland		64'415
Total		**1'227'088**

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

Table 43: Africa: Use of wild collection areas 2013

Land use	Area [ha]
Apiculture	6'216'021
Berries, wild	150
Forest honey	110'000
Fruit, wild	141
Medicinal and aromatic plants, wild	1'674'037
Nuts, wild	96'674
Oil plants, wild	685'494
Wild collection, no details	1'264'424
Wild collection, other	71'533
Total	**10'118'473**

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

Asia

Map 4: Organic agricultural land in the countries of Asia 2013

Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, governments and the Mediterranean Organic Agriculture Network (MOAN) for the Mediterranean countries. For detailed data sources see annex, page 281.

Organic Asia 2014

Ong Kung Wai[1]

With input from Kesang Tshomo, Bhutan; Abdus Salam, Bangladesh; Zhou Zejiang, China; Rasdi Wangsa, Indonesia; IFOAM Japan; Thatsaka Saphangthong, Lao PDR; Basanta Ranabhat, Nepal; Vitoon Panyakul & Towards Organic Asia team, Thailand; Nhung Tu Tuyet, Vietnam; Thilak Kariyawasam, Sri Lanka

Except for Japan, respondents reported 2014 has been a good year for organic with domestic market development creating more buzz than exports. Community Supported Agriculture (CSA) and Participatory Guarantee Systems (PGS) at the grassroots are developing apace as low-cost alternatives to 3rd party certification. However, there is a danger that national regulations, which continue to increase, will not pay due recognition to PGS even as national authorities struggle with how to implement mandatory 3rd party certification and compliance for imports. Innovative public private partnership solutions are emerging. Whilst many are still ambivalent about it, some are getting ready for the onset of the ASEAN Economic Community at the end of 2015. Framework agreements and arrangements to be developed for organic by the 10 ASEAN[2] member states for a 500 million single market may be a game changer for the region and beyond.

Lighthouse Bhutan

Although small in size and organic quantities, Bhutan continues as spiritual lighthouse for many as the only country that has chosen to be wholly organic. In March 2014, together with the International Federation of Organic Agriculture Movements (IFOAM), Millennium Institute and Navdanya[3], the government of Bhutan co-hosted the "IFOAM Conference on Organic and Ecological Agriculture in Mountain Ecosystems," attended by over 120 participants. The Thimphu Declaration underlining a paradigm change from "Feeding" to "Nourishing" was issued. Later in October 2014, at the 18th Organic World Congress at Istanbul, the Minister of Agriculture reaffirmed Bhutan's commitment to move towards the organic target with practical and realistic steps. It was a target that may be closer to reach than earlier thought.

A presentation of the current status, actions required and implications for organic development was made at a cabinet meeting. The National Organic Programme, once a project, has been upgraded to a division level with strengthened capacity to serve more

[1] Ong Kung Wai, Humus Consultancy, Penang, Malaysia

[2] The Association of Southeast Asian Nations, or ASEAN, was established on 8 August 1967 in Bangkok, Thailand, with the signing of the ASEAN Declaration (Bangkok Declaration) by the Founding Fathers of ASEAN, namely Indonesia, Malaysia, Philippines, Singapore and Thailand. Brunei Darussalam then joined on 7 January 1984, Viet Nam on 28 July 1995, Lao PDR and Myanmar on 23 July 1997, and Cambodia on 30 April 1999, making up what is today the ten Member States of ASEAN. More information is available at the ASEAN website at www.asean.org.

[3] Navdanya is a network of seed keepers and organic producers spread across 17 states in India. More information is available at http://www.navdanya.org

parts of the country. Of a total land size of 3'839'400 hectares, only 3 percent is under cultivation. National agriculture statistics of 2012 indicate of the total cultivated land, about 95 percent of field crops, and 98 percent of fruit trees are managed either organically or without use of chemical fertilizers, pesticides or herbicides. A conventional organic premium market approach to drive development would not suit. The challenge is not conversion but registration and up-scaling organic practices for better productivity, and also registration of vast areas of wild collection under supervision according to organic requirements.

The Bhutan National Organic Programme has aptly focused on a national branding and promotion approach through allowing the use of the National Organic Mark "Bhutan Organic" on all organic local produce as long as growers are registered and comply with domestic standards. Third-party certification is voluntary and free for the domestic market. Whilst not systemically or fully formalized, Bhutan is as close to 100 percent as any country can practically get. Bhutan was invited to make a presentation at the US Organic Trade Association's annual policy conference. May it continue to inspire.

Bangladesh

According to the Bangladesh Organic Products Manufacturers Association (BOPMA), the Bangladesh Ministry of Agriculture is not interested in organic agriculture, believing it will hamper food security. On the other hand, consumers are interested in organic products. The market boom reported in 2013 remains strong. The authenticity of organic claims in the market remains a concern. The private organic certification body established by BOPMA, Organic Bangladesh Limited, is up and running. Notwithstanding the ministry's position, BOPMA has been lobbying the Ministry of Agriculture to establish organic labeling regulations and formulate a national organic agriculture policy since 2006, albeit without success. Meanwhile, the project to foster entrepreneurs to establish 500 organic fertiliser factories, 20 organic pesticides production units, and 50 organic outlets by 2020, reportedly, remains on track.

China grows more for domestic

In November, 2014, the China National Certification and Accreditation Administration (CNCA) - the national organic competent authority - published a "Country Report on the Development of the Chinese Organic Sector." This was the first time that CNCA had officially published statistics of organic production in China. According to the report, the total certified organic acreage in 2013 was 2.1 million hectares, with 1.3 million hectares certified to the Chinese Organic Standard for the domestic market and 0.8 million hectares certified by foreign certification bodies of organic standards for export markets. CNCA also established a nationwide research program covering almost all aspects of the Chinese organic sector. The research budget amounted to several million US dollars and insiders noted that it was high, indicating the government's increased support for organic production.

In early 2014, external training was conducted in Germany for trainees from countries in the European Union who were interested in conducting inspections of the Chinese organic standard. The Chinese authorities have recently been making reforms to loosen some certification rules. Insiders are cautiously hopeful that the registration of external

inspectors, to conduct an inspection in foreign countries, may be made possible in the near future.

At the grassroots, Community Supported Agriculture (CSA) schemes are taking off. Starting in 2009, about 300 to 400 participants have been gathering annually at the National CSA Conference in Beijing (2009-2012), Shanghai (2013), and in December 2014, in Fuzhou (for the 6th conference), to exchange experiences. Many participants are now interested in the Participatory Guarantee Systems (PGS) concept. As there is no support for PGS in the current Chinese organic regulations, PGS groups, if established, are not be able to use the terms “organic” or “certification”.

3rd party certification blues in Indonesia

Although there is an increase in the interest of local governments to develop organic agriculture, third party certification blues linger on in Indonesia. At least seven local Indonesian governments are known to have an organic program/project in their area. Six local organic exhibitions or events and at least two national organic exhibitions - the Organic and Healthy Expo (Jakarta, June 2014) and Bogor Organic Fair (October 2014) - were held during 2014. The Indonesia Minister of Agriculture together with the Indonesian Embassy-Berlin and Indonesia Trade Promotion Center (ITPC) paid for a booth of 36 square metres at Biofach, Nuremberg in 2014, and their support will increase to a booth for Indonesia of 54 square metres at Biofach in 2015. Although government support for organic production is on the increase, the non-recognition of Participatory Guarantee Systems (PGS) - or Community Based Assurance (CBA), as they are known in Indonesia under the Indonesian organic regulation promulgated in May 2013 - remains an overarching concern and bane for organic agriculture advocacy organisations such as Indonesia Organic Alliance. The regulation (Peraturan Menteri Pertanian/"Permentan"/Ministry of Agriculture regulation no. 64) requires products labeled as ‘organic' to be certified by an approved third party certification body and include the logo "ORGANIC INDONESIA" on the packaging. The majority of organic producers in the country are small-scale farmers, and so such a regulation is not accessible as they are forced to seek expensive third party certification. Besides the domestic regulatory constraint, Indonesia Organic Alliance is also wary about what the onset of the ASEAN Economic Community at the end of 2015 would mean for organic small farmers in Indonesia.

No significant development for Japan

Japan reached equivalency agreements with the European Union, USA and Canada. Japan is currently in negotiations with Korea. Large companies are buying stocks of specialized organic distributers or absorbing them. The 5-year revision cycle for the Organic JAS Regulation has just started. However, the growth in production, sales, and the number of producers is low, according to IFOAM Japan. On the whole, there was no significant development in the organic agriculture movement, with the exception of the increased attention on issues arising from the Fukushima nuclear power accident. There is, however, an increased interest in domestically made products, family farming, the consumption of local produce, and the self-sufficiency lifestyle. For IFOAM Japan, the growing gap between the big, the rich and rest of society is a bigger concern to be addressed.

A national organic agriculture strategy for Laos PDR

The Lao organic sector had another good year in 2014. More farms have registered under the government organic certification programme. A total of 84 grower groups and 16 companies are now certified. More significantly, the Department of Agriculture has embarked on a process to develop a national organic agriculture strategy for Lao PDR. Unlike the trepidation Indonesia Organic Alliance has about the ASEAN Economic Community, the Department of Agriculture, Lao PDR sees good opportunities.

Nepal subsidy for export certification awaits accreditation

Authorities in Nepal are grappling with how to disburse funds designated for export certification. The funds are available for payment to certification bodies who are accredited by the National Organic Agriculture Accreditation Body (NOAB) of Nepal. However, as of end of 2014, as they are not based in Nepal, none of the foreign certification bodies working in Nepal have applied for accreditation. The domestic organisations who applied cannot issue export certification.

Malaysia

In 2014, the Malaysia organic industry started the process of making a bid to host the Organic World Congress (OWC) in 2017. Organic Alliance Malaysia submitted a bid, as did five other countries. The Malaysian bid was contingent on the revision of the financial arrangements of the current OWC hosting policy. As the financial arrangements were not agreeable to the IFOAM World Board, Malaysia subsequently withdrew its bid. However, the event will still come to Asia as India won the bid for the congress in 2017.

Sri Lanka rules

Development funders and activists for organic production in Sri Lanka are currently focusing on developing the local market. Supermarkets in Colombo now stock organic produce. On 10th July 2014, the Sri Lanka government published the "Export Development of Organic Products Regulations 2014." Therein, the regulations state it shall be the duty of every producer, processor, manufacturer and exporter of organic agricultural products to adhere to and comply with Sri Lankan Organic Standards. Every exporter or importer of organic agricultural products is required to be registered. Any importer, producer, processor, manufacturer or operator selling any organic agricultural product in contravention of the regulation shall, on conviction, be liable to a fine not less than twenty five thousand rupees and not exceeding one hundred thousand rupees. In addition, the court can order the confiscation, disposal or destruction of the organic product in relation to the offence, with the cost to be borne by the person convicted.

Doing well with domestic certification, Sri Cert is positioning to provide export certification in 2015 through collaboration within Certification Alliance, a network of 10 certification bodies working in the region.

Public vs Private in Thailand

Media messages in Thailand are reportedly confusing as was the country's political situation in 2014. Sometimes, they suggest agriculture policies will move towards

organic. Other times, there is a revival of interest to allow GMO. There were unexpectedly lots of private sector initiatives. Participation at the Thai Organic Trade Association (TOTA) training sessions was high. Asia Development Bank funded activities drew in many new faces, including more than 50 producer groups. Demand for certification, particularly from domestic processors increased. So did interest in Participatory Guarantee Systems (PGS) promoted by Thai PGS Organic+ as well as the private sector.

Consumer awareness continues to grow, as well as the small-scale 'direct trade' between producers and consumers, enabled by social enterprises are emerging. So are linkages between agriculture (land) reform and the organic movements. The MINDFUL MARKETS Forum + Green Fair, a paradigm change initiative, held at Srinakharinwirot University campus (SWU) Bangkok include keynote presentations from representatives of the Seikatsu Club Cooperative Union, La Via Campesina and Centre for Bhutan Studies & Gross National Happiness Research, Bhutan. A Right Livelihood lecture and workshop by the 2013 Award recipient Hans R. Herren (Biovision, Switzerland) was also held. The Mindful Markets Forum and Green Fair, and a Right Livelihood Summer School, are planned for 2015.

A highlight of Thai organic production was the big organic trade fair and symposium organized by the Ministry of Commerce in July 2014. To-date, the Ministry of Commerce has actively supported organic production, albeit with a focus towards export and the high-end market demand. Efforts by the government to return Thailand to its former status as the world's number one exporter of rice will, hopefully, also revive the fortunes of Thai organic rice exporters (after having fallen back because of the rice support scheme of the previous government).

News coverage during 2014 about high pesticide residues found in vegetables labeled with the government's "Q" quality mark eroded consumer confidence in the government's certification system. The government is interested in the regulation of organic labelling and for government agencies to have a bigger role in certification. Thailand currently has separate government agencies operating separate certification programmes for crop production, animal husbandry and aquaculture. This initiative is not welcomed by the Thai Organic Trade Association.

On 8 December 2014, The Bangkok Post carried a story titled, 'Big Changes begin down at the farm,' a report on the first organic rice harvest from a joint venture between a company and a village in Northeast Thailand. This is particularly noteworthy as the article was written by the Chair of the Democrat Party's policy unit about a project carried out by his company. The article cited the need to revitalize Thailand's aging farming communities and indirectly suggested the benefits of going organic as a way forward. This may be something to look forward to, should the Democrat Party return to government.

Hundreds points of lights in Vietnam

Whilst organic production in Vietnam is still predominantly for exportation (of foodstuffs such as tea, rice and shrimp), production for the domestic market (of vegetables, tea and rice) is reportedly expanding in Vietnam, as is the presence of Participatory Guarantee Systems (PGS). Following collaboration with ADDA

(Agricultural Development Denmark Asia) projects in the north of the country, PGSs are now developing in the middle of the country. Food safety concerns continue to drive consumer interest in organic produce, and farmers are making private investment in organic production. Authorities at the provincial and district levels are channeling government rural development funds to promote organic production, which is now appearing all over the country. However, the total number and scale of such production remains small. The government is revising the national organic standards and considering better support for organic production, though not in an official policy undertaking. The Vietnamese government is also supportive of GMO corn.

ASEAN, the Association of Southeast Asian Nations moves forward

In the 2014 issue of "The World of Organic Agriculture",[1] the ASEAN Standard for Organic Agriculture (ASOA) was reported to be meandering its way to completion. Largely unknown, even to those who have been following its progress, the ASOA has indeed been formally adopted in late 2014.[2]

The ASEAN Standard for Organic Agriculture pretty much reflects the Asia Regional Organic Standard (AROS) in most parts with minor differences here and there. Although yet to be recognised as such, this represents a significant and concrete success for the Global Organic Market Access (GOMA) project, a 3-party partnership between the Food and Agriculture Organisation of the United Nations (FAO), The United Nation's Conference on Trade and Development (UNCTAD) and IFOAM. The Asia Regional Organic Standard (AROS) was completed by GOMA in February 2012 to serve as a regional benchmark for equivalence as well as reference for countries planning to set national organic standards in the region. Using the AROS as working document, the ASEAN Special Task Force, which was established in April 2013 to develop the ASEAN Standard for Organic Agriculture (ASOA), completed the final draft in April 2014 with 3 workshops between 2 regular annual meetings. That ASEAN member states can reach consensus in just 12 months speaks highly of the GOMA project team foresight, inclusive consultations and sound preparatory work in development of the AROS.

ASEAN will follow up the ASOA with development of certification and equivalency among ASEAN member states. Three out of ten ASEAN member states, Indonesia, Philippines and Malaysia, have established organic labeling regulations. Thailand intends to do the same. The clock is ticking for government officials to carry out the necessary adjustments to fulfil the single market vision of the ASEAN Economic Community (AEC) to be implemented from end 2015.

As work starts on other aspects of the implementation of an ASEAN organic assurance system, ASEAN is likely to consider other GOMA tools since the AROS has served it well, such as International Requirements for Organic Certification Bodies (IROCB), Guide for Assessing Equivalence of Organic Standards and Technical Regulations (EquiTool), as well as suggestions based on the ASEAN Framework Agreement on Mutual Recognition Arrangements. Use of the GOMA equivalency assessment matrix is already mentioned in

[1] The 2014 issue of "The World of Organic Agriculture" is available here: http://www.organic-world.net/2630.html.

[2] The standard can now be viewed and downloaded from the ASEAN website: http://www.asean.org/communities/asean-economic-community/category/other-documents-6

the Strategic Action Plan of the ASOA. The first workshops for the development of explanatory notes on the ASOA and equivalence assessment of ASEAN member state's national organic standards are scheduled for March 2015 in the Philippines.

The ASEAN process may well be the first multi-party mutual recognition arrangement for organic production. The European Union had a central legislative structure in place when the EU Organic Regulation was set, and other recognition arrangements to-date have been bilateral, i.e. European Union-USA, USA-Canada, European Union-Japan, etc. The equivalence arrangement adopted by ASEAN could have a significant influence on the region of Asia and beyond as more countries continue to set and amend organic regulations.

ASEAN today; tomorrow the World

With the spate of bilateral recognition arrangements completed to-date, access to the more developed organic markets (European Union, USA, Canada, and Japan) requires, essentially, just a single certification to one of the current regional/national certification schemes for operators in the mentioned region or countries. Operators, namely producers in other places certified to any of the mentioned schemes, do not enjoy similar benefits.

ASEAN today is a pivotal political platform. Over time, it has become a forum where the more powerful countries (e.g. China, Korea, Japan, India, Australia, EU and USA), can get together to work things out. Together with the ASEAN Economic Community (AEC), it will gain additional market and economic weight, and is expected to play an important role in future trade arrangements, e.g. organic equivalency arrangements. ASEAN brings the ten member states into a single national certification arrangement, permitting trade amongst themselves. It will be interesting to see whether ASEAN, in the future, could also expand the arrangement to the rest of the organic world.

Managing imports for small countries or markets

Whereas labelling regulations are in place, authorities are struggling with the implementation of requirements for imports to meet national standards. They pose a dilemma where domestic markets are not big enough to attract the compliance of foreign operators or start government-to-government equivalency negotiations. Even if there is an interest to comply, the logistics of conducting an inspection can be daunting for both the operator and certification body. Certification bodies and operators are still struggling with organizing compliance to the Chinese market regulations, e.g., sending inspectors from China to the UK, where the chocolate processing operation is located, is not enough. Inspections also have to be carried out where the cocoa is grown.

For countries where national competent authorities are not set up to handle the registration of foreign inspection or certification bodies, other smart options need to be explored. The ‘problem' is acuter for countries where certification is provided by government agencies, e.g., the Department of Agriculture, as in Malaysia and Lao PDR. One appears to have been found. At the beginning of 2014, the Department of Agriculture (DOA) in Malaysia embarked on a public private partnership arrangement whereby Organic Alliance Malaysia, the national organic association, is appointed to handle the application and inspection of processors to the national organic certification

scheme. Certification decisions remain with the DOA. The DOA continues to provide free inspection to primary producers in the country. Organic Alliance Malaysia is also charged with verifying authenticity of the certification of imports and determining their equivalence to the Malaysian organic standards.

Criteria for recognition of prior certification include: The certification has to be to an organic certification scheme that is subject to external review or a party to a mutual recognition arrangement. The certification body must be approved or accredited to provide certification to the scheme in question. The certificate must be valid for the produce/product(s) applying for recognition.

Approval is on a batch basis, limited to the list and amount of produce/products applied for. Approval of prior certified produce/products is strictly only for the purpose for use as an ingredient or labelling of the final product(s). It does not grant any recognition status to the certification body or certification status to the producer/processor of the produce/product(s). The criteria and procedure provide ad-hoc verification of organic imports and allow trade flow until a more formal recognition arrangement is established at the ASEAN level and subsequently, between ASEAN and its trading partners. Whilst the above arrangement facilitates verification of imports, there is the matter of facilitating export certification.

Reducing the cost of certification

The arrangement of the Department of Agriculture (DOA) and the Organic Alliance Malaysia (OAM) also allows OAM to arrange and inspect for and export certifications. Having local inspectors to conduct joint inspections for both domestic and export certifications saves cost. This approach was proposed and adopted as a strategy to reduce the cost of external third party certification for organic exports from the Greater Mekong Sub-region (GMS) in one of the many activities implemented by the Asia Development Bank (ADB) Technical Assistance project "Implementing the Greater Mekong Sub-region Core Agriculture Support Program (Phase 2)."

The project starting with Lao PDR in December 2014, will also assist selected local organic service providers in Cambodia, Myanmar, and Vietnam to handle the application and inspection for ACT, the leading certification provider based in Bangkok, Thailand, and accredited to provide organic certification for export to the EU and Canada. In Lao PDR, a different smart public-private partnership arrangement came about. Whilst the handling will be done by a private company, the inspectors will be drawn from the Lao Certification Body, the government certification body, to enable joint inspections for domestic and export certifications. The innovative and smart public-private collaborations are refreshing. Regulatory authorities are coming to realise that their regulatory regime may not necessarily amount to recognition by export markets that operators are exporting to. ASEAN will need all the innovative smart public-private partnership it can muster. As ASEAN member states' No Gap No Trade policy takes effect alongside implementation of the ASEAN Economic Community's single market, ASEAN producers face a minimum of four certifications, i.e., National Good Agriculture Practice (GAP) and Global GAP as well as National Organic and Export Organic certifications, to be able to trade agriculture produce and products within and beyond the region.

One looks forward to what other innovative smart arrangements will arise from Cambodia, Myanmar, and Vietnam in 2015. The same Asia Development Bank project is also assisting the development of Participatory Guarantee Systems (PGS) in the Greater Mekong Sub-region.

With the formal adoption of the ASEAN Standard for Organic Agriculture (ASOA), ASEAN member organisations of the Certification Alliance (CertAll) made further progress on the harmonization of certification requirements. At the CertAll Partners' meeting in December 2014, partners agreed to and worked on a common certification management module based on the ECert software in partnership with Organic Services, the software provider. The output, i.e., common master data fields and an integrated inspection checklist, will allow for a single data entry and single-inspection reporting for multiple certifications, domestic and export, offered amongst partners. This includes non-organic inspection and certifications such as Utz and 4C.

Besides existing certification providers ACT, QCS, and OFDC offering certifications to the European Union, the US National Organic Programme (NOP), the Canada Organic Regime (COR), and the Chinese Regulation, CertAll partners signed on to work with Australian Certified Organic (ACO) to offer additional certifications to Japan and Korea.

E-learning

There was also an innovation in training delivery. The Asia Productivity Organisation (APO), who has been conducting organic certification and labelling courses annually in the region, tried out an E-Learning format for its 2014 Course on Production and Certification of Organic Food for Greater Market Access. Through the World Bank video conferencing facilities in Tokyo and in collaboration with facilities in Germany and selected trainee countries, the course was conducted online simultaneously to Bangladesh, India, Iran, and Nepal in one session and to the Philippines, Cambodia, Indonesia, Thailand, and Vietnam in another. This was a vast difference from the onsite training for 24 people in Manila, the Philippines, in 2013.

Statistics and Emerging Trends of Organic Vegetable Production in China[1]

XUE-QING HE,[2] YU-HUI QIAO,[3] MIN SU,[4] AND FRIEDERIKE MARTIN[5]

China is the largest vegetable producing and consuming country in the world. The area farmed for vegetables grew from 17.9 million hectares in 2003 to 19.6 million hectares in 2011, an increase of almost ten percent over those years (Wang Dongjie, et al. 2013). Because of the short growth cycle and high demand for water and nutrients, a lot of fertilizers and pesticides are used in conventional vegetable production.

Status of organic vegetable production

By the end of 2013, there were about 50'000 hectares under organic vegetables production. Perennial vegetables such as asparagus and bamboo shoots made up the category using the largest area (18'000 hectares), accounting for 36 percent of the total area, followed by tubers such as potato, cassava, sweet potato, Chinese yam, and taro (7'500 hectares, 15 percent). Further vegetable groups are cabbages, beans, solanaceous vegetables, and others (see Table 1).

In total, 753'135 tons of organic vegetables were produced in 2013, including 413'558 tons produced from in-conversion areas. The category with the highest production (177'336 tons) were tuber vegetables, accounting for 24 percent of total organic vegetable production. Fresh mustard vegetables were in second place, accounting for 13 percent of all organic vegetable production, followed by solanaceous vegetables and gourd vegetables.

Between 2009 and 2013, China's organic vegetable area increased but then decreased; the largest area was noted in 2011. The new organic standards, implemented in 2012, are more stringent, which led to a decrease of the organic vegetable area by 21 percent in 2012. Compared with 2012, the fully converted area decreased by 13 percent; the area under conversion, however, increased by 12 percent, and the overall organic vegetable area decreased by three percent in 2013 (Figure 51).

[1] This project was funded under the National Social Science Fund (11AZD095), Corresponding author: Qiao, Yu-hui, qiaoyh@cau.edu.cn

[2] Xue-qing He, Postgraduate Student, College of Resource and Environmental Science, China Agricultural University, Beijing

[3] Prof. QIAO Yu-hui, PHD, corresponding author, qiaoyh@cau.edu.cn College of Resource and Environmental Science, China Agricultural University, Beijing

[4] Min Su, College of Resource and Environmental Science, China Agricultural University, Beijing

[5] Friederike Martin, Integrated Natural Resource Management at Humboldt Berlin, Germany

Table 44: China: Area and production of various organic vegetables by vegetable group 2013

Categories	Area [ha]	Share of total area (%)	Production [metric tons]	Share of total production %
Perennial vegetables	18'269	36.16	42'349	5.6
Tuber vegetables	74'74	14.79	177'336	23.6
Cabbages	4'307	8.53	22'614	3.0
Beans	3'479	6.88	22'899	3.0
Solanaceous vegetables	2'891	5.72	91'564	12.2
Gourd vegetables	2'766	5.47	85'677	11.4
Bulb vegetables	2'490	4.93	41'305	5.5
Root vegetables	2'412	4.77	36'607	4.9
Leaf vegetables	2'319	4.59	29'435	3.9
Edible fungus	1'317	2.61	43'904	5.8
Aquatic vegetables[1]	1'239	2.45	22'313	3.0
Chinese cabbages	1'211	2.40	38'071	5.1
Mustard vegetables	329	0.65	98'355	13.1
Bud seedling vegetables	24	0.05	706	0.1

Source: CNCA 2014

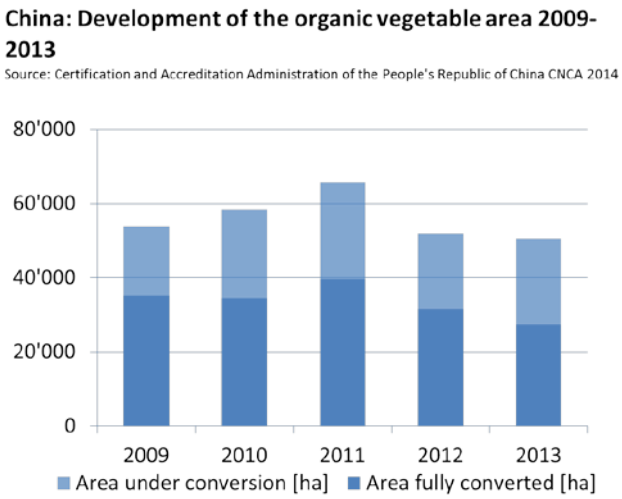

Figure 51: China: Development of organic vegetable area 2009-2013

Source: CNCA 2014

Domestic and foreign trade of organic vegetables

There are various domestic sales channels for organic vegetables, such as supermarkets, specialized organic retailers, on-farm sales, farmers' markets, online shops, and gift box sales (Wang Liping et al., 2013). The domestic market for organic vegetables has been

[1] Aquatic vegetables include lotus root, chufa, water arum or bean sprouts

booming since the year 2010, especially in the big cities such as Beijing, Shanghai, and Guangzhou. Organic vegetable exports include all kinds of frozen vegetables, pickled vegetables, dehydrated vegetables, and a small amount of fresh vegetables. Total organic vegetable exports reached 21'000 thousand tons in 2011, accounting for 0.21 percent of the country's vegetable exports. The value of organic vegetable exports was 21.24 million US dollars in 2011. In 2011, Chinese organic vegetables were exported to 13 countries; the top three countries were Japan, the Netherlands, and the United States, accounting for 65 percent of the total organic vegetable volume exported. Organic vegetables are also exported to Canada, Belgium, the UK, Australia, and other neighbouring Asian countries.

The development potential of organic vegetables

The total area under organic vegetable production (about 50'000 hectares) in China was about one sixth of the total area of organic vegetables grown in the world (300'000 hectares in 2013 according to the FiBL-IFOAM survey 2015). The share of the total Chinese vegetable area was very low (0.26 percent). This shows that organic vegetables have a lot of room to grow. The shares of the total vegetable area in the countries with the largest organic vegetable area, like the United States, Mexico, and Italy, ranged from 6 to 8 percent (FiBL-IFOAM, 2015, see Table 36). This shows that China's organic vegetable production has much room for development, which, however, requires appropriate technical and policy support.

Conclusions and development proposals

The development prospects for organic vegetables are very good in China, but development needs the support of technology and policy. More scientific studies should be carried out, and at the same time, more practical techniques should be extended to farmers. Market demand is the main driver for the development of organic agriculture, and when deciding to produce organic vegetables, producers should fully understand the market prospects of their products and formulate the relevant sales strategy. Organic vegetable production needs an overall plan covering the whole food chain from production to sale. Many issues need to be considered, such as the interests of the farmers, crop protection, techniques, or market development. A lot of support from the government is needed at all levels to promote the professional production of organic vegetables by large-scale enterprises to enable a development that covers the whole supply chain.

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Asia: Current statistics

Julia Lernoud,[1] Helga Willer,[2] and Bernhard Schlatter[3]

The area of organic agricultural land in Asia is slightly more than 3.4 million hectares, which is 0.2 percent of the total agricultural area in the region. Eight percent of the global organic agricultural land is in Asia. Compared with 2001 (400'000 hectares), organic land has increased almost tenfold. Between 2012 and 2013, the organic area in Asia increased by 200'000 hectares or 6.5 percent, beginning to recover after the loss of half a million hectares in India in 2012. The country with the largest organic agricultural area is China (2.1 million hectares), and the country with the most producers is India (650'000 producers). The countries with the highest shares of organic agricultural land are Timor-Leste (6.6 percent) and Mongolia (4.7 percent).

Land use

Land use details were available for more than half of the organic agricultural area. In 2013, 37 percent of all organic farmland was used for arable crops (1.3 million hectares), 0.8 percent for grassland/grazing areas (22'000 hectares), and 11 percent (585'000 hectares) for permanent crops. Detailed information was not available for 49 percent of the agricultural land, so we can assume that each category has a far larger share of the total organic land than what was reported. For the first time, detailed land use data was available for China; this explains the increase of some arable crop groups in Asia and also globally (e.g., for cereals and oilseeds).

The key *arable crop* group is cereals with almost 800'000 hectares reported in total. Most cereals were grown in China (almost 600'000 hectares) and Kazakhstan (approximately 130'000 hectares). Oilseeds are also an important crop group grown on at least 325'000 hectares, mainly in China and Kazakhstan. Big arable crop producers, such as India, did not provide land use information in 2013; so it can be assumed that the total arable crop area is larger than that shown in this report. Almost eleven percent of the organic farmland was used for *permanent crops*; most of this land was used for nuts (almost 75'000 hectares, mainly in China), coffee (67'600 hectares, mainly in Indonesia and Timor-Leste), and tea (at least 57'000 hectares, almost all of this in China).

Market

Market data are not available for all countries, but we can assume that the market is continually growing. Seven countries provided retail sales values (Table 12, page 62). China published official data for the first time in 2014 and reported sales of 2.4 billion euros in 2013, making the country the world's fourth-biggest market for organic products. More information about the Asian market is available in the chapter about the global market from Amarjit Sahota (page 120).

For more information about the Asian figures, see data tables for Asia, page 169.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Asia: Graphs

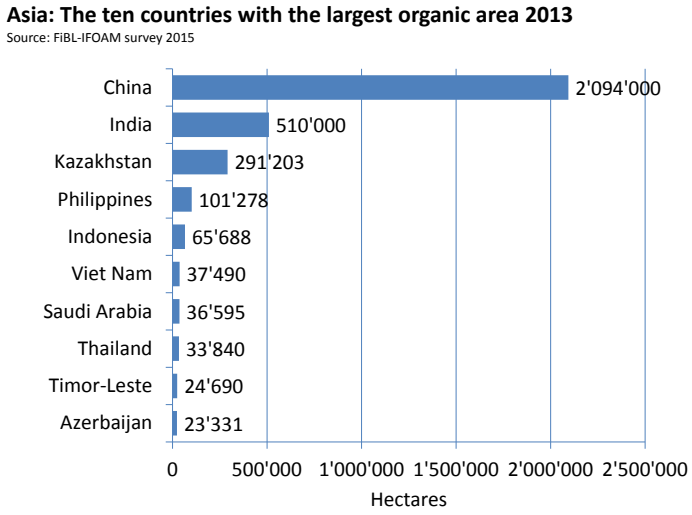


Figure 52: Asia: The ten countries with the largest organic agricultural land 2013

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

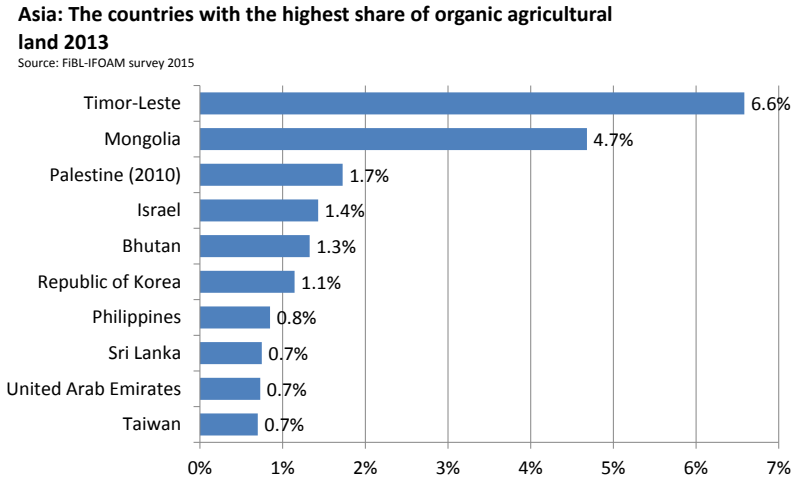


Figure 53: Asia: The countries with the highest share of organic agricultural land 2013

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

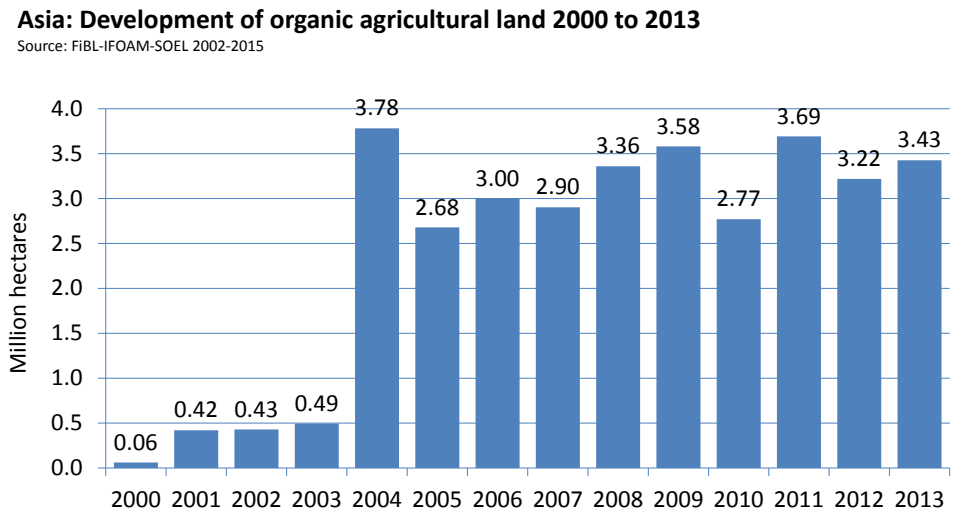


Figure 54: Asia: Development of organic agricultural land 2000 to 2013

Source: FiBL-IFOAM-SOEL survey 2002-2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.

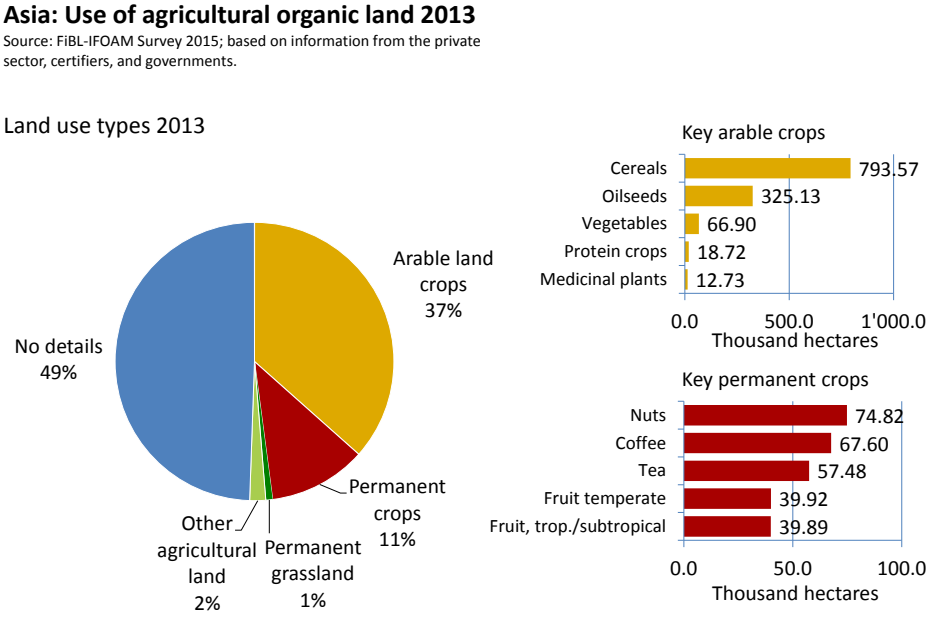


Figure 55: Asia: Use of organic agricultural land 2013

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

Organic Agriculture in Asia: Tables

Table 45: Asia: Organic agricultural land, share of total agricultural land and number of producers 2013

Country	Area [ha]	Share of total agr. land [%]	Producers
Afghanistan	61	0.0%	264
Armenia	1'000	0.1%	21
Azerbaijan	23'331	0.5%	288
Bangladesh	6'860	0.1%	9'335
Bhutan	6'726	1.3%	
Cambodia	9'889	0.2%	6'753
China	2'094'000	0.4%	
Georgia	1'999	0.1%	150
India	510'000	0.3%	650'000
Indonesia	65'688	0.1%	5'700
Iran (Islamic Republic of)	12'156	0.0%	1'663
Iraq	40	0.0%	
Israel	7'471	1.4%	326
Japan	10'611	0.3%	2'130
Jordan	2'898	0.3%	98
Kazakhstan	291'203	0.1%	
Kyrgyzstan	2'856	0.0%	1'128
Lao People's Democratic Republic	6'442	0.3%	1'342
Lebanon	2'571	0.4%	132
Malaysia	603	0.0%	119
Mongolia	12'922	4.7%	
Myanmar	897	0.0%	15
Nepal	9'361	0.2%	687
Oman	38	0.0%	38
Pakistan	22'397	0.1%	105
Palestinian, State of	6'354	1.7%	832
Philippines	101'278	0.8%	3'008
Republic of Korea	21'210	1.1%	13'963
Saudi Arabia	36'595	0.0%	79
Singapore		Processing only	
Sri Lanka	19'517	0.7%	404
Syrian Arab Republic	19'987	0.1%	2'458
Taiwan	5'937	0.7%	2'988
Tajikistan	12'659	0.3%	10'486
Thailand	33'840	0.2%	9'279
Timor-Leste	24'690	6.6%	72
United Arab Emirates	4'150	0.7%	50
Uzbekistan	213	0.0%	
Viet Nam	37'490	0.4%	6'829
Total	**3'425'939**	**0.2%**	**730'744**

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

Table 46: Asia: All organic areas 2013

Country	Agriculture [ha]	Aquaculture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Afghanistan	61				61
Armenia	1'000			11'250	12'250
Azerbaijan	23'331		123	937	24'391
Bangladesh	6'860	9'338			16'198
Bhutan	6'726			15'605	22'330
Cambodia	9'889				9'889
China	2'094'000			1'435'000	3'529'000
Georgia	1'999			1'405	3'405
India	510'000			5'180'000	5'690'000
Indonesia	65'688	94		10'330	76'111
Iran (Islamic Republic of)	12'156			27'552	39'708
Iraq	40				40
Israel	7'471				7'471
Japan	10'611				10'611
Jordan	2'898				2'898
Kazakhstan	291'203			863	292'066
Kyrgyzstan	2'856				2'856
Lao People's Democratic Republic	6'442			16'786	23'228
Lebanon	2'571				2'571
Malaysia	603				603
Mongolia	12'922				12'922
Myanmar	897				897
Nepal	9'361			24'422	33'783
Oman	38				38
Pakistan	22'397				22'397
Palestinian, State of	6'354				6'354
Philippines	101'278				101'278
Republic of Korea	21'210				21'210
Saudi Arabia	36'595				36'595
Sri Lanka	19'517				19'517
Syrian Arab Republic	19'987			8'000	27'987
Taiwan	5'937				5'937
Tajikistan	12'659			1'055'890	1'068'549
Thailand	33'840	270			34'109
Timor-Leste	24'690				24'690
United Arab Emirates	4'150				4'150
Uzbekistan	213			5'000	5'213
Viet Nam	37'490	35'600		1'300	74'390
Total	**3'425'939**	**45'302**	**123**	**7'794'340**	**11'265'703**

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

Table 47: Asia: Land use in organic agriculture (fully converted and in-conversion) 2013

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		607'773
Arable crops	Arable crops, no details	8'817
	Cereals	793'568
	Flowers and ornamental plants	2'323
	Green fodder from arable land	8'835
	Medicinal and aromatic plants	12'733
	Mushrooms and truffles	1'318
	Oilseeds	325'126
	Protein crops	18'725
	Root crops	1'294
	Seeds and seedlings	746
	Strawberries	2
	Sugarcane	6'869
	Textile crops	5'989
	Vegetables	66'899
	Arable crops, other	6
Arable crops total		*1'253'249*
Cropland, no details		1'086'194
Other agricultural land	Fallow land, crop rotation	58'884
	Home gardens	129
	Other agricultural land	2'240
	Other agricultural land, no details	1'690
	Unutilized land	27
Other agricultural land total		*62'970*
Permanent crops	Berries	1
	Citrus fruit	11'891
	Coconut	30'353
	Coffee	67'598
	Flowers and ornamental plants, permanent	20
	Fruit	10
	Fruit of temperate climate zones	39'922
	Fruit, tropical and subtropical	39'894
	Fruit/nuts/berries	3
	Grapes	21'482
	Medicinal and aromatic plants, permanent	17'901
	Nuts	74'819
	Olives	2'203
	Tea/mate, etc.	57'477
	Permanent crops, other	24'504
Permanent crops total		*388'077*
Permanent grassland		27'676
Total		**3'425'939**

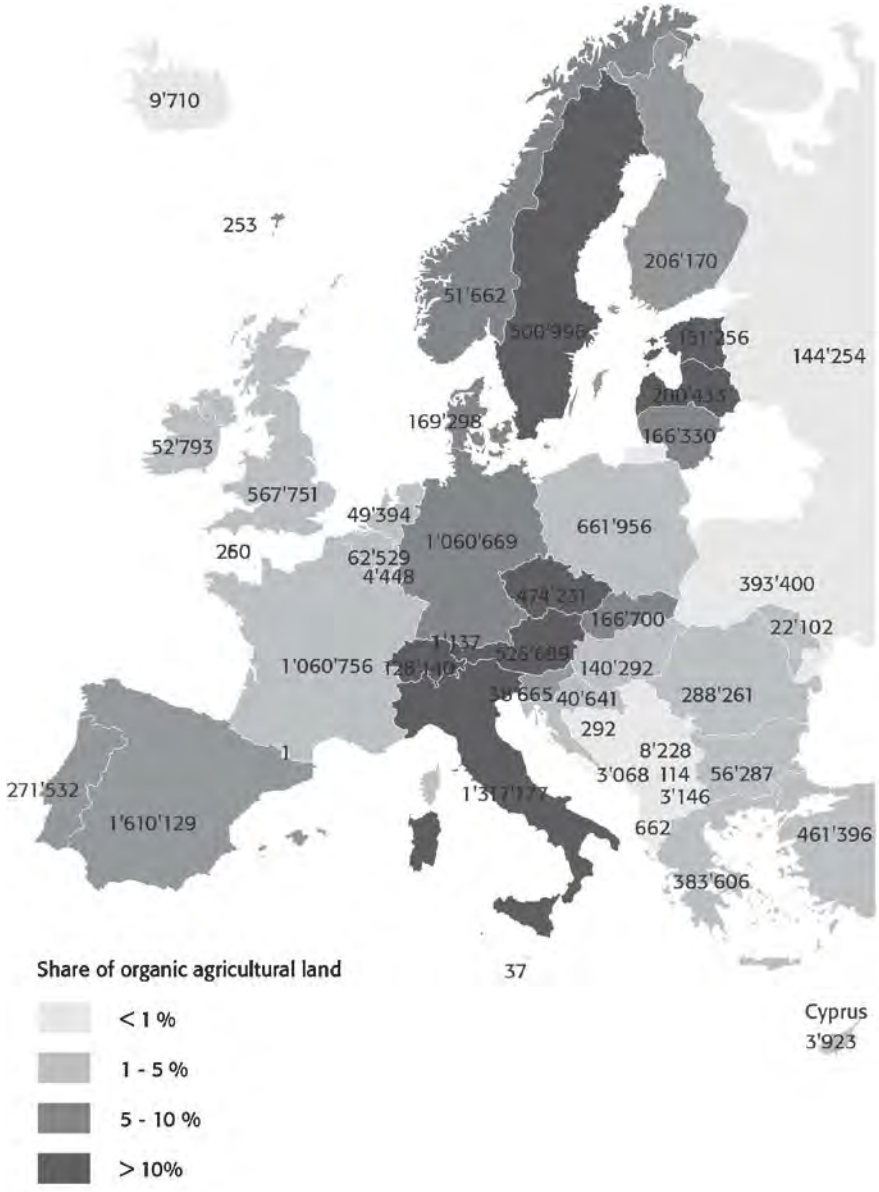
Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.

Table 48: Asia: Use of wild collection areas 2013

Land use	Area [ha]
Apiculture	7'862
Berries, wild	161
Forest honey	9'007
Fruit, wild	541
Medicinal and aromatic plants, wild	919
Nuts, wild	179
Palm sugar	100
Wild collection, no details	7'774'348
Wild collection, other	1'222
Total	**7'794'340**

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

Europe



Map 5: Organic agricultural land in the countries of Europe 2013

Source: FiBL-AMI survey 2015; based on information from the private sector, certifiers, governments, Eurostat and the Mediterranean Organic Agriculture Network. For detailed data sources see annex, page 281.

Organic Farming in Europe

Helga Willer[1] and Stephen Meredith[2]

Globally, Europe continues to be a forerunner in organic agriculture. The positive development is due to a number of reasons, including strong consumer demand, legal protection and requirements for organic production and labelling as set out in EU and national legislation, as well as the development of the private organic standards and labelling. In addition, agricultural policy support measures, such as conversion and maintenance payments for organic production, have contributed positively to sectoral development. In some countries, more coordinated policy approaches have also been promoted through national and regional organic action plans, which seek to link support measures with further growth and expansion (Sanders et al. 2011).

In 2013, the area of organic land, the number of organic farmers, and the organic market continued to grow in Europe. In Europe, 11.5 million hectares (European Union: 10.2 million), constituting 2.4 percent (EU: 5.7 percent) of the agricultural area, were under organic management in 2013; there was an increase of three percent compared to that of 2012. There were more than 330'000 producers (European Union: almost 260'000). The value of the European organic market in 2013 was 24.3 billion euros (EU: 22.2 billion euros), and the overall growth rate was approximately six percent from the 2012 figures. For more details, please view the chapter on European organic farming statistics (see page 181).

EU regulation on organic farming

Since the early 1990s, the EU regulatory framework has contributed to the development of a harmonised approach to consumer protection, preventing unfair competition and ensuring common standards for the production, labelling and marketing of organic produce in Europe. Private and other national standards have helped to pioneer innovation in organic standards across the sector (Meredith et al., 2014). In March 2014, the European Commission published a legislative proposal (European Commission, 2014a) for a new organic food and farming legislation accompanied by an organic action plan (European Commission, 2014b). The proposal focuses on three main objectives: maintaining consumer confidence, maintaining producer confidence, and making it easier for farmers to switch to organic agriculture (European Commission, 2014c).[3]

[1] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Stephen Meredith, Policy Coordinator, European Union Group of the International Federation of Organic Agriculture (IFOAM EU), Brussels, Belgium, www.ifoam-eu.org

[3] Specifically, the European Commission proposes:

- to strengthen and harmonize rules, both in the European Union and for imported products, by removing many of the current exceptions in terms of production and controls;
- to reinforce controls by making them risk-based;
- to make it easier for small farmers to join organic farming by introducing the possibility for them to sign up to a group certification system;
- to better address the international dimension of trade in organic products with the addition of new provisions on exports; and finally

Figure 56: European Union: Logo for organic products.
The "Euro-leaf" design shows the EU stars in the shape of a leaf against a green background, conveying the message: Nature and Europe. The logo can be accompanied by national or private logos. Since July 1, 2010, the organic logo of the EU has been made mandatory on all pre-packaged organic products that were produced in any of the EU Member States and meet the necessary standards.

While the organic movement shares and supports the Commission's aim for a sustainable growth of organic food and farming throughout Europe and acknowledges the need for further development of the regulation, it is concerned that the proposal would lead to a decline of organic production in Europe in particular at the expense of smaller enterprises and less developed regions. The sector sees that changes to the Commission's proposal are necessary to support the development of the sector, based on a progressive step-by-step process – backed by financial investment – with a clear vision taking account of diversity of Member States, regions and organic operators based on the principles of organic farming (IFOAM EU, 2014a). Members of the European Parliament and a number of Member States[1] have also criticised the European Commission's proposal on the organic regulation. In December 2014, the European Commission decided that if in the first six months of 2015 no agreement is reached on the proposal, it should be replaced by a new initiative (European Commission 2014d). The organic sector has stated that it will continue to work to ensure that the proposal achieves better outcomes than the current regulation and helps to support the sustainable development of organic agriculture in Europe (IFOAM EU 2014b).

EU policy support for organic farming

Since the beginning of the 1990s, EU policy support has contributed to the development of organic farming primarily in the EU under agri-environmental programmes (now under the Common Agriculture Policy (CAP) Pillar II, Rural Development Programme).[2] Discussions on the CAP reform for the period of 2014 to 2020 have taken place over the last four years. New legislation was agreed on by the European Commission, Parliament and Agricultural Ministers in June 2013.[3] The year 2014 has been dominated by the final adoption of implementing rules and negotiations between the Commission and Member State authorities on the implementation of Pillar 1 direct payments and new Rural Development Programmes. At time of press, 9 out of 118 programmes have been adopted with the European Commission anticipating that a further 15 will be adopted in the first quarter of 2015 and remaining programmes from mid-2015 (European

› to simplify the legislation to reduce administrative costs for farmers and improve transparency.

[1] In addition a joint declaration by the agriculture ministers from the Czech Republic, Hungary, Poland, Slovakia, Bulgaria, Romania and Slovenia has highlighted a number of concern with the proposal see Common declaration at http://data.consilium.europa.eu/doc/document/ST-14089-2014-INIT/en/pdf

[2] Switzerland and Denmark introduced support schemes already in the 1980s, and in 1989, Germany introduced support for organic farming under what is known as the extensification program. With the EU's agri-environmental programs, this support was extended to all EU countries (since 1992). The type and amount of support provided within this program varies within the different EU Member States. Many non-EU countries have similar support schemes.

[3] Detailed information on the Common Agricultural Policy after 2013 is available at the website of the European Commission at http://ec.europa.eu/agriculture/cap-post-2013/index_en.htm.

Commission 2014d, 2014e).[1,2] The importance of using this CAP reform to transition EU agriculture towards a more sustainable path, with organic farming as a model approach, has been stressed by the organic movement through the reform process. Key outcomes have been the recognition of organic farming under direct payments and rural development programmes including higher investment support rates and EU co-financing as well as acknowledgement under quality schemes support and advisory services. The new reform also promotes innovation that seeks to move towards agro-ecological production systems, whilst maintaining a legal minimum spending for environment measures that include organic farming. At the same time, the new CAP does not introduce a radical shift towards more sustainable farming systems, with overall spending for rural development disproportionately cut compared to direct payments (Meredith *et al*., 2014).[3]

Of particular interest in terms of mainstreaming organic farming in rural development is the acknowledgment by EU leaders of the need for agro-ecological innovation to redirect European agriculture onto a more sustainable path. The newly established European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI) is an EU policy instrument supported jointly under the European Union's research and innovation framework program Horizon 2020 and rural development policy until 2020. Its main objective is to bridge the gap between research and farming practice by encouraging stakeholders from different areas of the agri-food system – farmers, businesses, researchers and advisers – to share ideas and experiences, develop innovative solutions to current problems and challenges, and to put the results of research projects into practice.

All key elements of the new CAP are expected to come into force on a rolling basis in 2015. The outlook for organic farming in Europe over the coming years is very much dependent on how well new policy is implemented at national and regional implementation to advance the sustainable development of the sector.

Research

Today, organic farming research is funded under national research programs or national organic action plans, as well as through European programs.[4] Even though there are no figures available for all European countries, it is known that the funds of the eleven countries that were part of the ERA-Net[5] project CORE Organic I[1] amounted to more

[1] For the latest development on new rural development programming is available at the website of the European Commission ec.europa.eu/agriculture/rural-development-2014-2020/country-files/

[2] For the latest development on new rural development programming is available at the website of the European Commission ec.europa.eu/agriculture/rural-development-2014-2020/country-files/

[3] The EU budget for the period 2014-2020 was agreed by EU Heads of State and Government at a European Council meeting in February 2013 and approved by European Parliament in 19 November 2013 following some small concessions by the European Council. Meredith et al., 2014 provide an overview of agricultural spending for period 2014-2020 based on information available at time of press. More information is now available on the European Commission's website ec.europa.eu/agriculture/cap-funding/budget/index_en.htm

[4] For a list of organic farming research projects funded by the European Commission, see http://www.organic-research.org/european-projects.html

[5] The objective of the ERA-NET scheme is to step up the cooperation and coordination of research activities that are carried out at the national or regional levels in the Member States and Associated States.

than 60 million euros in 2006 (Lange et al. 2007). Newer data is currently being compiled by the Research Institute of Organic Agriculture and will be released in 2015.

Several organic farming research projects have been funded under the framework programs of the European Union since the mid-1990s. Furthermore, there are several European projects that do not have organic farming as their focus, but they carry out related research. In the Seventh Framework Programme for Research and Technological Development, which was launched in 2008, 14 projects focus on organic farming. In the meantime, the first calls for projects for the succeeding Horizon 2020 programme were launched. The following projects are still running:

- Co-Free: Innovative strategies for copper-free low input and organic farming systems (2012-2016), www.co-free.eu
- CORE Organic Plus - Coordination of European Transnational Research in Organic Food and Farming Systems (2014-2016), www.coreorganic.org
- IMPRO: Impact matrix analysis and cost-benefit calculations to improve management practices regarding health status in organic dairy farming (2012-2016), www.impro-dairy.eu
- ORAQUA European Organic Aquaculture - Science-based recommendations for further development of the EU regulatory framework and to underpin future growth in the sector (2014-2016), www.oraqua.eu/
- OSCAR: Optimising Subsidiary Crop Applications in Rotations (2012-2016), web3.wzw.tum.de/Oscar

OrganicDataNetwork project successfully concluded

The European research project OrganicDataNetwork (Data network for better European organic market information, www.organicdatanetwork.net) ended in December 2014. The project aimed to increase the transparency of the European organic food market through better availability of market information about the sector, meeting the needs of the policy makers and actors involved in organic markets. Its major achievements are:

> The ORganic Market data MAnual and CODE of Practice (OrMaCode) for the initiation and maintenance of good organic market data collection and publication procedures, including a tutorial. The OrMaCode covers different key areas of organic market data collection, processing, storage, and publication/ dissemination and is available at ormacode.organicdatanetwork.net (Zanoli et al. 2014);

>Recommendations for future organic market data collection (Zanoli 2014);

>Market database, which is available as an interactive table at the OrganicDataNetwork's website at www.organicdatanetwork.net/odn-statistics-data.html (Willer & Schaack 2014).

> Case studies in the Czech Republic, France, Germany, Italy, United Kingdom, and a group of non-EU Mediterranean countries (Gerrard et al. 2014).

CORE Organic – "Coordination of European Transnational Research in Organic Food and Farming Systems" intends to increase cooperation between national research activities. CORE Organic Plus, the third CORE Organic project that started in 2014, has 24 partners from 21 countries/regions. The overall objective of CORE Organic is to enhance quality, relevance and utilization of resources in European research in organic

[1] CORE Organic (Co-ordination of European Transnational Research in Organic Food and Farming), www.coreorganic.org. CORE Organic was a three-year coordination action in organic food and farming (2004 to 2007). The overall objective was to gather a critical mass and enhance the quality, relevance, and utilization of resources in European research in organic food and farming. It was succeeded by the CORE Organic II and the CORE Organic PLUS projects.

food and farming and to pool resources across Member States to finance transnational research in organic food and farming.

Founded in 2008, the European Technology Platform for Organic Food and Farming (TP Organics, www.tporganics.eu) identifies the research and innovation needs of the European organic food and farming sector and communicates them to policy makers.[1] The platform unites large companies, small & medium enterprises, researchers, farmers, consumers and civil society organisations active in the organic value chain from production, input & supply, to food processing, marketing and consumption. In December 2014, TP Organics published priority topics for the Horizon 2020 Work Programme 2016/2017. Horizon 2020 is the current research framework programme of the European Union. According to TP Organics, the topics will contribute to the implementation of the European Union's Organic Action Plan as well as leverage the organic sector's contribution to sustainable food security, resilient food systems and the renaissance of rural areas. The selection of topics is the result of a process of one year and a half with experts and stakeholders, including an on-line consultation with more than 300 responses. Together, the topics will support sustainable growth of the organic sector in Europe and beyond. (TP Organics 2014). In December 2014, TP Organics published a Strategic Research and Innovation Agenda describing the top research and innovation priorities of the European organic sector until 2020. Solving the challenges described in the Agenda will be crucial to further drive the development of the sector and strengthen its competitiveness. The Agenda is the result of a participatory process of one year and a half with experts and stakeholders, including an on-line consultation that attracted more than 300 responses (TP Organics, 2014).TP Organics will use the Strategic Research and Innovation Agenda to influence the agenda of EU and national research programmes as well as the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI).

The international counterpart of TP Organics, the Technology Innovation Platform of IFOAM (TIPI, tipi.ifoam.org), held two meetings in 2014: Science Day at Biofach in Nuremberg and a workshop at the IFOAM Organic World Congress. At these meetings, TIPI's draft of the global vision and research strategy for organic farming was discussed (Niggli et al. 2014). It is expected that the final version will be ready in 2015.

In 2014, the project "Promoting university education in organic farming in South-East Europe" came to an end.[2] Five South-East European universities that teach courses in organic farming have taken part in the project. The development of a complete lecture module on organic farming at undergraduate level is a major outcome of the project. All

[1] The TP Organic vision paper, published in December 2008, reveals the huge potential of organic food production to mitigate major global problems, from climate change and food security, to the whole range of socio-economic challenges in the rural areas (Niggli et al. 2008). In February 2010, the Strategic Research Agenda (SRA), the second major document of the Technology Platform TP Organics (www.tporganics.eu) was finalized, underlining research priorities and a number of suggestions for research projects (Schmid et al. 2009). The Implementation Action Plan explains how the research priorities and research topics, identified in the Strategic Research Agenda, can be implemented. A focus is laid on funding instruments, research methods, and communication of results (Padel et al. 2010). Many of the topics covered in these documents were taken into consideration in recent European calls.

[2] The project was funded through the Swiss National Science Foundation (SNSF) SCOPES programme, which is targeted at Eastern European countries and newly independent states from the former Soviet Union. The aim of the project was to improve the teaching at universities offering courses on organic farming by giving the teaching staff access to information and tools.

the lectures and further teaching material are available at the project website elearning.fibl.org.

Organic action plans

Organic action plans are a further important instrument for the sustainable development of the organic sector. In several countries, different organic support measures are combined and coordinated within an organic action plan. Typically, organic action plans are based on a detailed analysis of the strengths and weaknesses of the organic sector. They comprise of a balanced mix of different supply-oriented policy measures (such as area payments, information for farmers) and demand-oriented policy measures (such as marketing aids, consumer information campaigns) tailored to local conditions. The action plan mechanism is particularly useful, because efforts to develop the organic sector seek to address and enforce the growth capacity of the entire sector. In 2013, 27 countries in Europe had an action plan, many of them with quantitative targets (Sanders and Schmid 2014; see also country reports Willer et al., 2014).

The first European Action Plan for organic food and farming was launched in 2004. A new action plan was adopted by the European Commission in March 2014 (European Commission 2014b). The organic movement widely welcomed the publication of a new organic action plan in 2014. However, whereas the launch of a strong action plan has been a long standing demand of the organic movement, the proposed plan lacks clear commitments. Although the analysis of the current developments and challenges in the organic sector is described well and presented concisely in the action plan, it lacks ambition for concrete action with clear objectives, time frames to reach the goals and a dedicated budget for specific actions is missing. Moreover, the document does not indicate if the Commission foresees any evaluation of the proposed actions after a certain period of time. The organic movement has stressed that it is now crucial that all EU institutions commit to an ambitious implementation of the action plan with dedicated funding and support provided through EU policy instruments such as the Common Agriculture Policy, the new EU research framework - Horizon 2020, and the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI) (IFOAM EU, 2014a).

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- tporganics.eu: European Technology Platform TP Organics

Organic Farming and Market Development in Europe

HELGA WILLER[1] AND DIANA SCHAACK[2]

This article gives an overview of results of the market data collected in the OrganicDataNetwork project, which was funded by the European Union (EU) under its 7th framework programme for research, demonstration and technological development and ended in 2014.[3] Under this project, for the first time, detailed organic market data for all European countries was collected[4] and stored in one single database, which is available online.[5] In order to present these data, the statistical report for Europe is more comprehensive than for the other continents.

Key data for the organic sector 2013

Organic agricultural land is now at 11.5 million hectares in Europe, constituting 2.4 percent of the continent's agricultural land. In the European Union, 10.2 million hectares of farmland were organic, with a share of 5.7 percent of its agricultural land being organic in 2013. In eight European countries (European Union: six countries), ten percent or more of the agricultural land is organic. Growth of organic agricultural land has been substantial in Europe and in the European Union over the last decade, where the organic area has almost doubled since 2004, when most of the new member states (EU-13)[6] became part of the European Union. In the new member states after their accession to the EU, organic farming became, due to policy support and access to major markets, an attractive option. Land use data show that organic agriculture produces a wide range of products according to the demand of the markets. Organic production in the EU-13, the EU candidate and potential candidate countries (CPC),[7] and other European countries has filled many gaps for the EU-15[8] countries, where production volumes of raw materials are insufficient.

Producer numbers have also grown significantly (almost 260'000 in the European Union; and more than 330'000 in Europe), and since 2004, growth rates in the new Member States have been considerably higher than in the EU-15. A large proportion of processors and importers are located in the EU-15 and Switzerland, showing that the new member states and further European countries still need to develop their processing capacities in order to become less dependent on organic imports and increase the value of their own export products.

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[1] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de

[3] The project "Data network for better European organic market information" (OrganicDataNetwork) has received funding from the European Union's Seventh Framework Programme for Research, Technological Development and Demonstration under grant agreement no 289376.

[4] The data was collected by the Research Institute of Organic Agriculture (FiBL), Switzerland and the Agricultural Market Information Company (AMI), Germany, among the partners of the OrganicDataNetwork. In addition, further data sources were used.

[5] This database is available at http://www.organicdatanetwork.net/odn-statistics.html

[6] EU-13 refers to the 13 member states that became members of the EU in or after 2004.

[7] CPC refers to EU Candidate Countries – Albania, Iceland, Montenegro, Serbia, Macedonia (FYROM) and Turkey - and Potential Candidates - Bosnia & Herzegovina and Kosovo - as categorised by the European Union. More information available at: www.europa.eu/about-eu/countries.

[8] EU-15 refers to the 15 member states that were members of the European Union before 2004.

With **retail sales** in 2013 valued at 22.2 billion euros, the European Union is the second largest single market for organic products in the world after the United States. The market showed a growth rate of approximately 6 percent. The European market for organic products was valued at approximately 24.3 billion euros (North America almost 27 billion euros). European countries have top rankings for market share and per capita consumption worldwide: three countries have an organic food market share of more than five percent, with individual products and product groups reaching even higher shares. Eggs, for instance, can constitute as much as 20 percent of all eggs sold. Baby food or meat substitutes reach organic shares of about 50 percent. Five countries had a per-capita consumption of more than 100 euros in 2013. Almost no data is available on **exports and imports**, but it may be assumed that, with the growing domestic markets, international trade activities will increase for both intra-EU trade as well as exports and imports to and from the European Union.

Looking at the European organic sector by country group, it becomes evident that in the **EU-15** both organic agricultural land and the organic market have shown constant growth in the past ten years. Production is diversified, and domestic demand can be met to a large degree, even though imports play an important role for many countries and not only for products that cannot be produced there, such as coffee or bananas, but also for domestic products such as cereals. Overall the market is well developed, with a full range of products available. In a global context, the EU and, in particular, the EU-15 countries are leaders in terms of share of the organic market as a proportion of total agriculture and the overall market. The per capita consumption of organic products is also higher in the European Union than in other parts of the world. Much of the market's development has been driven by strong consumer interest, a well-developed organic sector with strong institutions, state support and Organic Action Plans.

After their accession to the European Union, many of the **EU-13** countries saw their organic production increase very quickly, driven by support from the European Union's rural development programmes. Even though the share of organic land is high, production, market shares, and per capita consumption remain low in some countries. The inadequate development of processing facilities means that local demand for processed products often cannot be met, and many processed products are imported. However, recent high growth rates in countries like Croatia, Poland, and Slovenia show that the market is developing rapidly.

Similarly to the EU-13, some **EU candidates and potential candidates (CPC)** have experienced rapid growth in organic agricultural land over the past couple of years. However, domestic and export-led market development as well as processing have not kept pace. In these countries, wild collection plays an important role (fruit and mushrooms). Since 2004, in the **EFTA** countries,[1] the development of organic land has not been as fast as in the other country groups. Nevertheless, Switzerland and Liechtenstein have very high shares of organic agricultural land, strong organic sectors, a good consumer base and state support, making the sector a well-established part of society. In the remaining European countries, particularly strong growth was recently noted in Ukraine.

[1] EFTA is the European Free Trade Association. Its members are: Iceland, Liechtenstein, Norway, and Switzerland.

Table 49: Europe: Key indicators by country and country group 2013

	Country	Area [ha]	Area share [%]	Producers	Retail sales [Mio €]	Market share [%]	€/person
EU [EU15]	Austria	526'689	19.5%	21'810	1'065	6.5%	127
	Belgium	62'529	4.6%	1'487	403	1.6%	36
	Denmark	169'298	6.4%	2'589	917	8.0%	163
	Finland	206'170	9.0%	4'284	215	1.6%	
	France	1'060'756	3.9%	25'467	4'380	2.6%	
	Germany	1'060'669	6.4%	23'271	7'550	3.7%	93
	Greece	383'606	4.6%	23'433	60	0.4%	5
	Ireland	52'793	1.3%	1'263	99	0.7%	22
	Italy	1'317'177	10.3%	45'969	2'020	2.0%	31
	Luxembourg	4'448	3.4%	212	84	3.2%	157
	Netherlands	49'394	2.6%	1'646	840	2.4%	
	Portugal	271'532	8.1%	3'308	21	0.2%	2
	Spain	1'610'129	6.5%	30'502	998	1.0%	21
	Sweden	500'996	16.3%	5'584	1'018	4.3%	106
	United Kingdom	567'751	3.3%	3'918	2'065		33
EU [EU15] total		*7'843'937*	*6.1%*	*194'743*	*21'735*		
EU [EU13]	Bulgaria	56'287	1.8%	3'854	7		1
	Croatia	40'641	3.1%	1'608	104	2.2%	25
	Cyprus	3'923	2.7%	719	2		2
	Czech Republic	474'231	11.2%	3'910	70	0.7%	7
	Estonia	151'256	16.0%	1'553	22	1.6%	17
	Hungary	140'292	3.3%	1'673	25	0.3%	2
	Latvia	200'433	11.0%	3'473	4	0.2%	2
	Lithuania	166'330	5.7%	2'555	6	0.2%	2
	Malta	37	0.4%	12			
	Poland	661'956	4.3%	25'944	120	0.2%	3
	Romania	288'261	2.1%	15'315	80	0.7%	4
	Slovakia	166'700	8.8%	365	4	0.2%	1
	Slovenia	38'665	8.4%	3'049	49	1.8%	24
EU [EU13] total		*2'389'010*	*4.7%*	*64'030*	*492*		
CPC	Albania	662	0.1%	46			
	Bosnia and Herzegovina	292	0.01%	24	0.3		
	Kosovo	114	0.03%	10			
	Macedonia (FYROM)	3'146	0.3%	382			
	Montenegro	3'068	0.6%	62	0.1		0.2
	Serbia	8'228	0.2%	1'281			
	Turkey	461'396	1.9%	65'042	4		0.1
CPC total		*476'906*	*1.4%*	*66'847*	*4*		
EFTA	Iceland	9'710	0.4%	33			
	Liechtenstein	1'137	31.0%	38	5		129
	Norway	51'662	4.8%	2'452	224	1.1 %	44
	Switzerland	128'140	12.2%	6'308	1'668	6.9%	210
EFTA total		*190'649*	*4.3%*	*8'831*	*1'897*		
other European countries	Andorra	1	0.01%				
	Channel Islands	260	3.0%				
	Faroe Islands	253	8.4%				
	Moldova	22'102	0.9%	172			
	Russian Federation	144'254	0.1%	70	120		1
	Ukraine	393'400	1.0%	175	12		0.3
other European countries total		*560'270*	*0.2%*	*419*	*132*		
Europe total		**11'460'773**	**2.4%**	**334'870**	**24'260**		**32.6**
European Union total		**10'232'947**	**5.7%**	**258'773**	**22'227**		**43.8**

Source: OrganicDataNetwork survey 2015 based on national data sources, FiBL-AMI survey 2015, based on Eurostat and national data sources
*CPC = EU candidate and potential candidate countries

Organic agricultural land by country and country group

In 2013, 11.5 million hectares were farmed organically in Europe and slightly more than 10.2 million hectares in the European Union.

The countries with the largest areas of organic land are Spain, Italy, France and Germany. Globally, 43 million hectares of farmland were organic in 2013, and approximately 27 percent of the world's organic farmland was in Europe. The four European countries mentioned above were among the ten countries with the largest organic areas globally.

Of the 11.5 million hectares of organic agricultural land in Europe, 7 million hectares were fully converted, and 1.9 million were under conversion. Not all countries provided data on their fully converted and in-conversion areas (e.g., Austria, Germany, Portugal and Switzerland).

Particularly in Italy, Spain, Turkey, and Poland (2012 data for Poland), large areas are under conversion, and therefore, a major increase in supply may be expected from them in the near future.

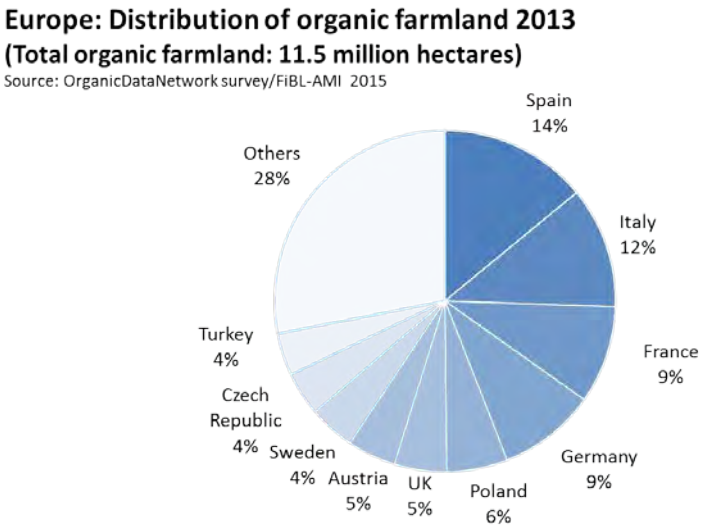


Figure 57: Distribution of organic farmland in Europe 2013 (11.5 million hectares)
Source: OrganicDataNetwork survey/FIBL-AMI based on national data sources and Eurostat

Europe: Organic agricultural land by country 2013

Source: OrganicDataNetwork-FiBL-AMI Survey 2015

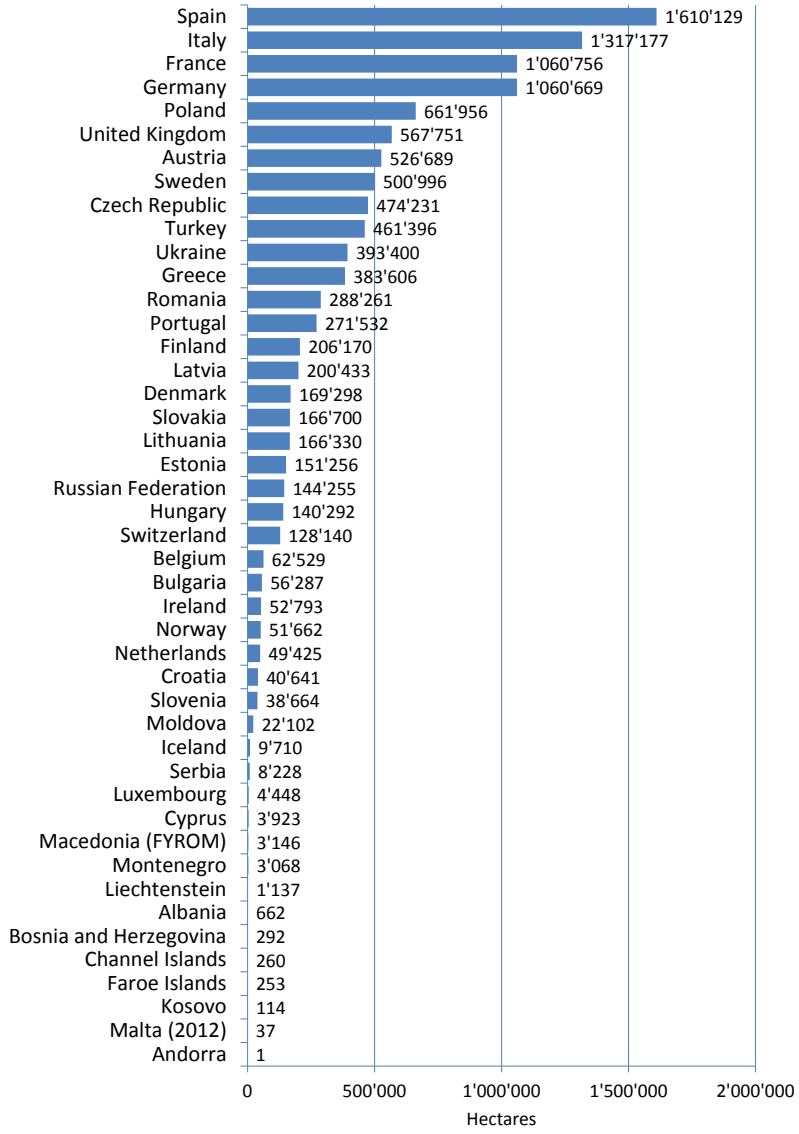


Figure 58: Europe: Organic agricultural land by country 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources

Shares of organic agricultural land

In the European Union, 10.2 million hectares of organic farmland (in 2013) constituted 5.7 percent of the total agricultural land (Europe: 11.5 million; 2.4 percent) (see Table 49).

In eight countries, more than 10 percent of the agricultural land is organic. The countries with the highest shares are Liechtenstein, Austria, Sweden, and Estonia. One of the goals of the Austrian Organic Action Plan was to have 20 percent of all agricultural land be farmed organically, which was achieved in 2010.

The country with the highest share in Europe (and the second-highest in the world) was Liechtenstein (see Figure 60). In the EU-15,[1] 6.1 percent of the agricultural land was organic, thus representing a higher share than in the EU-13 (4.7 percent). In the new member states, Estonia, the Czech Republic, and Latvia have more than 10 percent organic land. Despite the high organic shares of the agricultural land, in some EU-13 countries, organic production remains low due to high shares of grassland and the lack of processing facilities. For EU candidates and potential candidates, shares of the total organic agricultural land are still low, whereas two EFTA countries, Switzerland (12.2 percent) and Liechtenstein (31 percent), have very high shares.

Globally, 1 percent of the agricultural land was organic in 2013. The country with the highest share was the Falkland Islands with 36 percent, followed by a number of European countries. In eleven countries, globally, more than 10 percent of the farmland was organic. However, 60 percent of the countries had less than 1 percent organic land. In Europe, this percentage was only 25 percent.

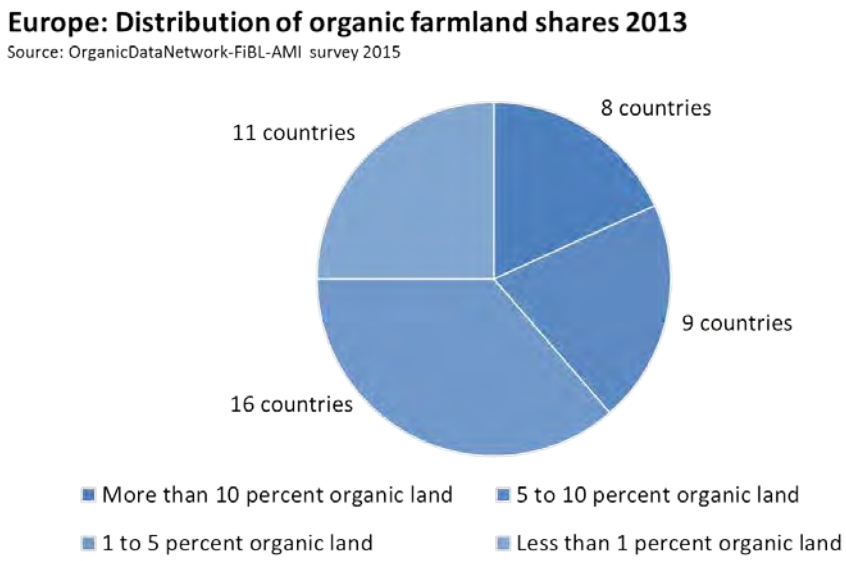


Figure 59: Europe: Distribution of the organic shares of all farm land 2013
OrganicDataNetwork-FiBL-AMI-IAMB survey 2015, based on Eurostat and national data sources

[1] EU-15 refers to the 15 member states that were members of the European Union before 2004.

Europe: Shares of organic agricultural land by country 2013

Source: OrganicDataNetwork-FiBL-AMI Survey 2015

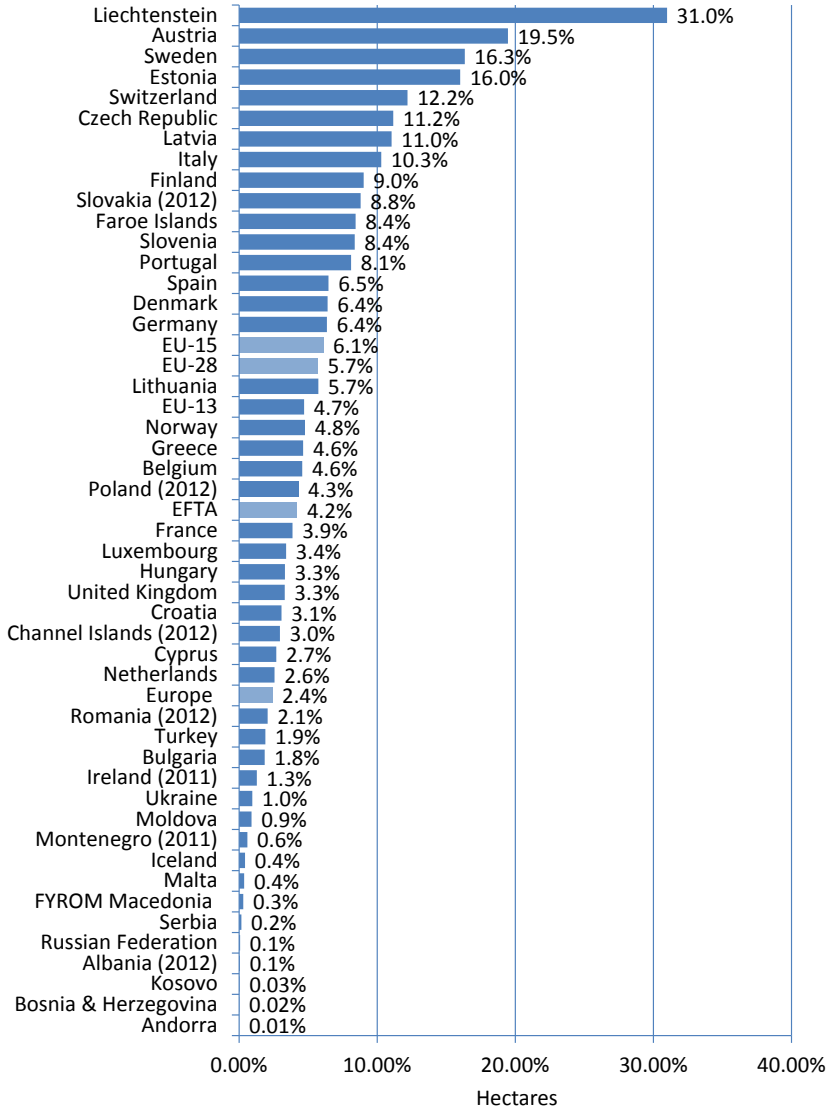


Figure 60: Europe: Shares of total organic agricultural land 2013

OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources and Eurostat

Growth of the organic land

In 2013, the organic agricultural land in Europe increased by 180'000 hectares (European Union: 155'000) or 3 percent. The country with the largest growth of organic land were Italy (+ 150'000 hectares), Ukraine (+120'000), and Portugal (+71'000). The highest relative increases were in Bulgaria and Ukraine (+44 percent each).

Since 2004, when 10 new member states joined the European Union, organic agricultural land has increased by 76 percent in the EU (Europe: 80 percent) – from 5.8 million hectares in 2004 to 10.2 million hectares in 2013. In the EU-15, growth was slower (+50 percent), whereas in the new member states, the area almost trebled. In many EU-15 countries, organic farmland had already grown before 2004 to a comparatively high level. For EU candidates and potential candidates, high growth (more than 400 percent) was noted. Most of the growth in the past years was in Turkey, whereas, in the EFTA countries, growth was modest.

Globally, since 2004, the organic farmland has increased by 40 percent, a slower growth than in Europe.

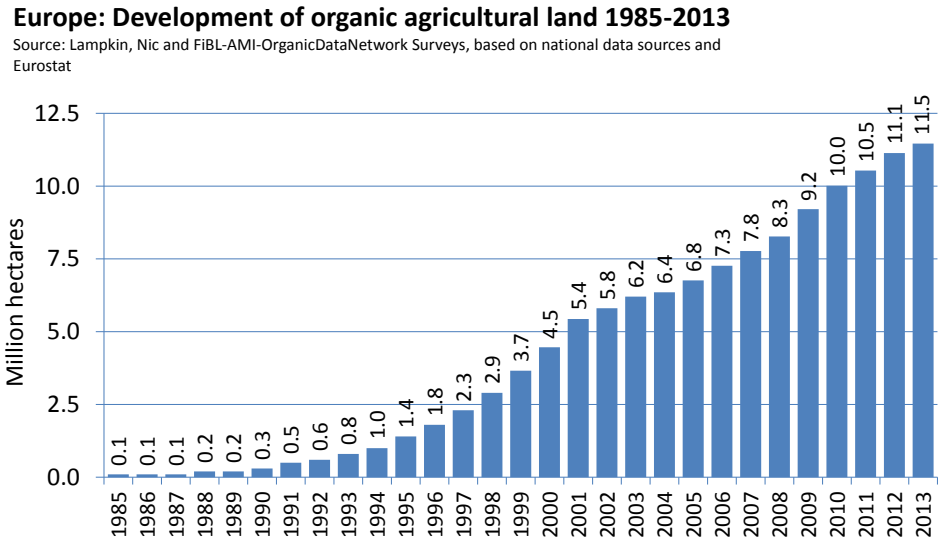


Figure 61: Europe: Development of organic agricultural land 1985-2013

Source: Lampkin, Nic and FiBL-AMI-OrganicDataNetwork based on national data sources and Eurostat

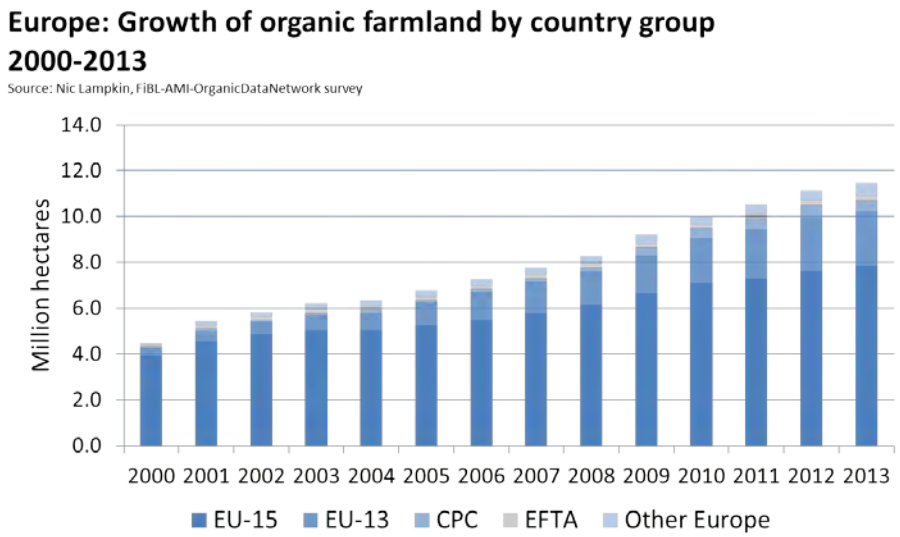


Figure 62: Growth of organic agricultural land by country group, 2000-2013
Source: FiBL-AMI-OrganicDataNetwork 2015 based on national data sources and Eurostat

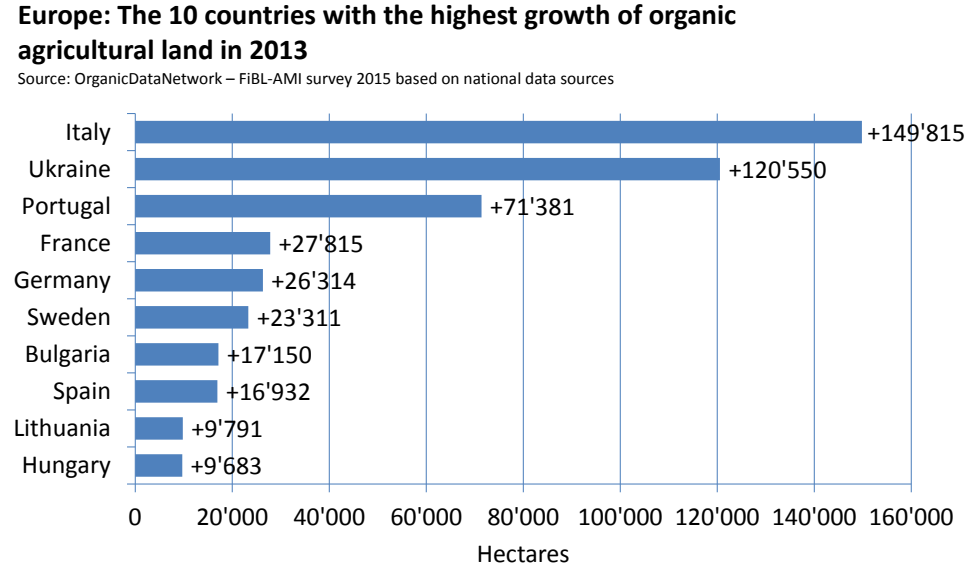


Figure 63: The 10 countries with the highest growth of organic agricultural land in 2013
Source: OrganicDataNetwork- FiBL-AMI survey 2015 based on national data sources and Eurostat

Organic Land Use and Crops

Land use

For all countries in Europe, land use and crop details are available. In this respect, Europe differs substantially from other parts of the world, for which such data is often not supplied. In 2013, in Europe, 4.6 million hectares (3.9 million hectares in the EU) were used for arable crops (40 percent of the agricultural land), and 4.8 million hectares or 42 percent of the farmland were used as grassland (EU: 4.6 million hectares). Approximately 1.3 million hectares, or 11 percent of the farmland, were used to grow permanent crops (EU: 1.16 million hectares) (see Table 50).

About half a million hectares of grassland (permanent and temporary, as well as green fodder) are under conversion, as well as 0.3 million hectares of cereals, 0.17 million hectares of olives, 80'000 hectares of grapes, and 56'000 hectares of nuts.

Table 50: Organic agricultural land by land use type 2013

In million hectares	EU [EU15]	EU [EU13]	European Union	CPC	EFTA	Other	Europe
Arable land crops	2.95	0.95	3.90	0.32	0.64	0.31	4.60
Permanent crops	1.04	0.11	1.16	0.13	0.002	0.009	1.30
Permanent grassland	3.34	1.27	4.63	0.02	0.11	0.07	4.82
Total **	7.84	2.39	10.23	0.48	0.19	0.56	11.46

Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources Eurostat
Note: Total includes other agricultural land and land for which no further details were available.
CPC = EU candidate and potential candidate countries

The area for all land use types has grown steadily since 2004, even though there was a slight decrease of arable land and permanent grassland in 2013. The largest increase was for permanent crops, which almost tripled since 2004 (Figure 65).

By country, the largest permanent grassland or grazing areas are in Spain, followed by Germany and the UK. The largest cropland areas (i.e. arable and permanent crops together) are in Italy (0.8 million hectares), Spain (0.7 million hectares), and France (0.6 million hectares). Apart from the agricultural land, there are large areas of wild collection in Europe, 13 million hectares in total. The largest are is in Finland (berries) followed by a number of South Eastern European countries.

In summary, it can be said that organic food production in the Europe countries provides a wide range of products in accord with market demands. Organic production in the new member states has filled many gaps for the EU-15 (countries that were members of the European Union before 2004), where production volumes of raw materials are insufficient. Due to the lack of processing facilities in the new member states and further countries, there is a demand for processed items, many of which are imported from the EU-15 countries. All European countries depend on imports of tropical crops such as bananas, coffee, and sugar.

Europe: Use of agricultural organic land 2013

Source: Source: OrganicDataNetwork-FiBL-AMI Survey 2015

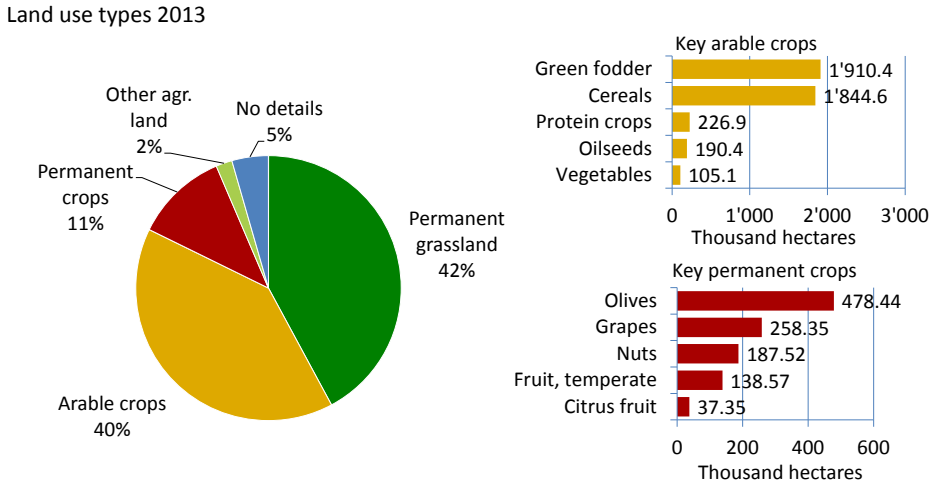


Figure 64: Land use in organic agriculture in the Europe, 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2015

Europe: Growth of area by land use type 2004-2013

Source: OrganicDataNetwork-FiBL-AMI Survey 2015

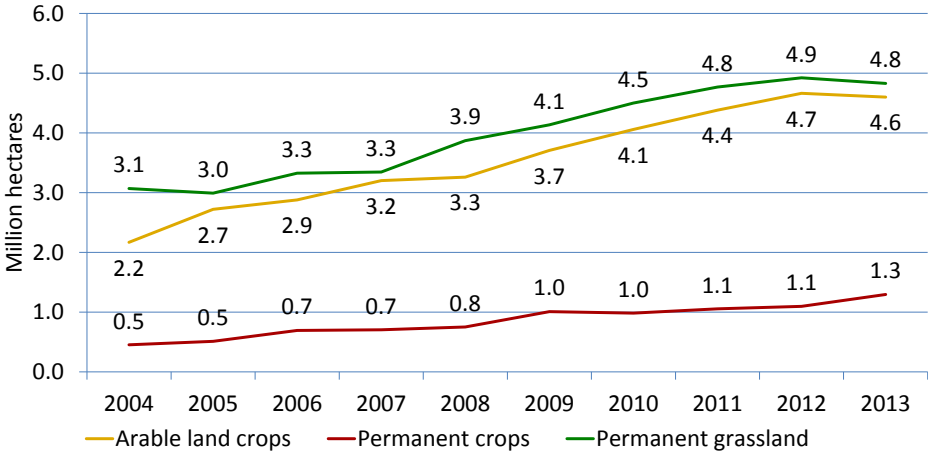


Figure 65: Growth of organic agricultural land by land use type 2004-2013

Source: OrganicDataNetwork-FiBL-AMI survey 2015

Arable and permanent crops

In Europe, 4.6 million hectares were categorised as arable land in 2013. The countries with the largest arable crop areas are Italy, France, and Germany. The key arable crop group is green fodder (1.9 million hectares), followed by cereals (1.85 million hectares). Italy, Germany, and Spain have the largest cereal areas. In 2013, organic vegetables were grown on 105'000 hectares; key producing countries were Italy, France, and the United Kingdom (including potatoes in the vegetable area). From 2004 to 2013, of the arable crops, the largest growth was noted for protein crops (+220 percent), followed by green fodder from arable land (+200 percent), oilseeds (+157 percent) and cereals (+107 percent). The highest organic shares are reached for protein crops (5.4 percent) mainly because the conventional protein crop area has been decreasing for many years due to the availability of cheap soybeans on the world market. Vegetables reach comparatively high shares (2.1 percent) because the high consumer demand for fresh vegetables is being fulfilled. For details see Table 54.

In Europe, 11 percent of the agricultural land was used to grow permanent crops (1.3 million hectares; 8.3 percent of all permanent crops). The countries with the largest areas of permanent cropland are Spain, Italy, and France. A large part of the permanent cropland is used for olives, grapes, and nuts. Whereas, for most permanent crops, the EU-15 countries have the largest areas, the EU-13 countries have considerable areas of temperate fruits (e.g., apples in Poland) and berries in the Baltic countries. Both Polish apples (in concentrates) and Baltic (frozen) berries can be found in juices or yogurts all over Europe. High growth rates from 2004 to 2013 were achieved, particularly for nuts (+258 percent), grapes (+249 percent), and temperate fruit (+215 percent). The organic shares for permanent crops were higher than those for the arable land: 11.6 percent for nuts, 10 percent for berries, and 8.3 percent for olives. For details see Table 54.

Development of selected crop groups 2004-2013

Source: FiBL-AMI survey 2006, OrganicDataNetwork 2015

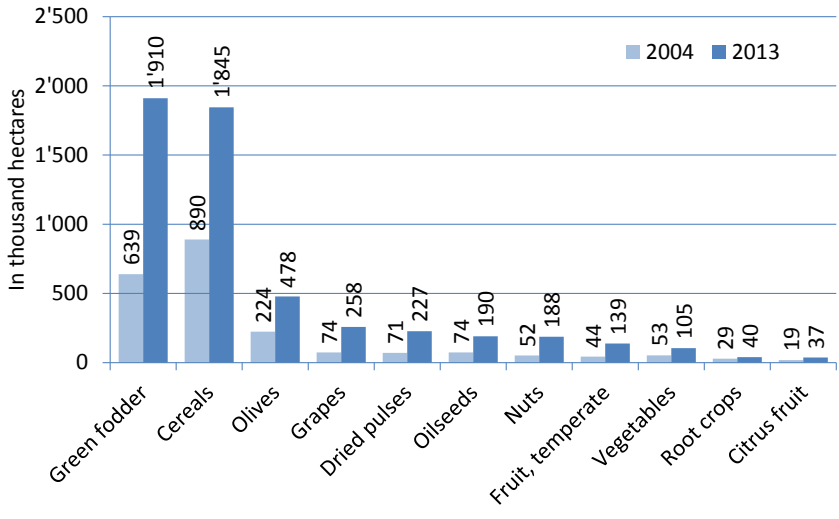
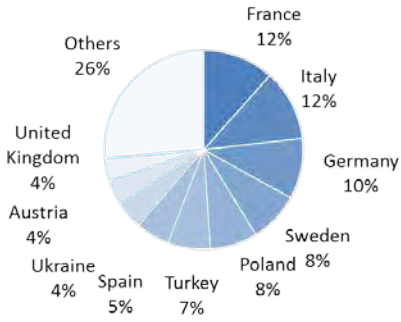


Figure 66: Growth of selected arable and permanent crop groups in Europe 2004 and 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015

Europe: Distribution of organic arable land by country 2013
(Total: 4.6 million hectares)
Source: OrganicDataNetwork-FiBL-AMI survey 2015



Europe: Distribution of organic arable land by crop group 2013
(Total: 4.6 million hectares)
Source: OrganicDataNetwork FiBL-AMI survey 2015

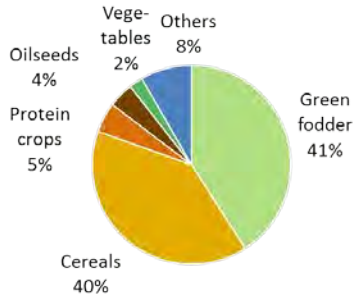
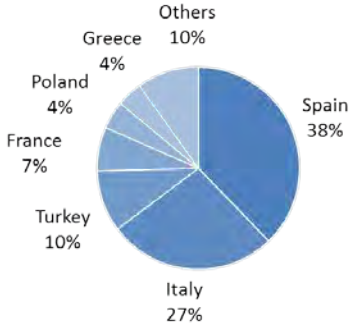


Figure 67: (Left): Europe: Distribution of organic arable land by country 2013
Figure 68: (Right): Europe: Distribution of organic arable land by crop group 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015

Europe: Distribution of organic permanent cropland by county 2013
(Total 1.3 million hectares)
Source: OrganicDataNetwork-FiBL-AMI 2015



Europe: Distribution of organic permanent cropland by group 2013
(Total 1.3 million hectares)
Source: OrganicDataNetwork survey-FiBL-AMI 2015

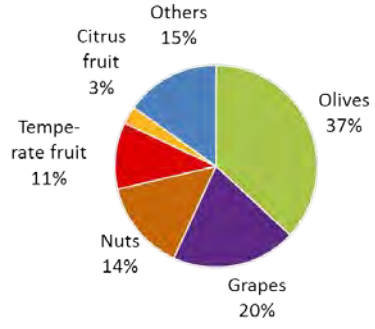


Figure 69: (Left): Europe: Distribution of organic permanent cropland by country 2013
Figure 70: (Right): Europe: Distribution of organic permanent cropland by crop group 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015

Animal husbandry

In many countries, organic animal husbandry began with beef, milk and sheep production. Livestock products continue to have the highest organic shares within the sector. The conversion of more extensive production of beef and sheep that graze on grassland is comparably easy. The conversion of monogastric animals like pigs and poultry is far more complicated and requires much higher price surpluses for the farmers. This is due to the requirements for animal husbandry in the EU regulation and dependence on partially expensive forages. Statistics on the number of organic animals are incomplete and do not allow, for the moment, for a complete picture of the sector. However, taking into account available information, the organic animal sector is developing at a fast pace in the European Union (European Commission 2014).

The following should be noted: For the Eurostat data and national data, no clear distinction is made between the number of animals slaughtered and the places or average numbers of stock over the year, and it is not always clear which of these is given when "livestock numbers" are quoted. Adding up the data for pigs and poultry over all countries, therefore, has weaknesses. The data that are presented here should, therefore, be treated as an approximation to the overall picture.

In Europe, 3.2 million heads of bovine animals, 4.5 million sheep, 0.7 million pigs, and 35 million heads of poultry were kept. The strongest increase between 2007 and 2013 was noted for poultry: +78 percent. However, beef and dairy cattle also grew substantially: (+50 percent), followed by pigs (+32 percent) and sheep (+29 percent) (Table 51). Organic animal production still remains limited in comparison with the total animal production in Europe and the European Union (between 0.5 and 4 percent depending on the animal species). The pork sector has the lowest weight. This stems partly from the difficulties posed by the provision of organic animal feed and the high price premiums consumers have to pay for pork, as well as poultry. The highest shares are found in the sheep and bovine sectors; these meat types are considered to be of premium level in the conventional market as well and realise higher prices; thus, organic premiums are smaller.

Table 51: Organic livestock in Europe and the European Union 2013[1]

	Europe			European Union		
	Animals [heads]	Share of all animals	Increase 2007-2013	Animals, [heads]	Share of all animals	Increase 2007-2013
Bovine animals	3'366'763	2.7 %	+51%	3'108'312	3.9 %	+50 %
Sheep	4'446'751	2.9 %	+29%	4'156'842	4.2 %	+26 %
Pigs	673'874	0.4 %	+32%	644'866	0.5 %	+31 %
Poultry	34'867'488	1.4 %	+78%	32'738'116	2.2%	+70 %

Source: OrganicDataNetwork -FiBL-AMI survey 2015. Shares elaborated by FiBL based on FAO data (FAOSTAT 2014). It should be noted that FAOSTAT provides only totals for bovine animals, sheep, pigs and poultry without further specifications.

1 In the case of pigs, for organic only the fattening pics and breeding sows were counted.

Producers, processors and importers

In Europe, more than 330'000 organic producers were counted in 2013. In the same year, in the European Union, there were almost 260'000 producers, and globally almost two million producers were counted, with approximately one-sixth of these in Europe. Turkey is the country in Europe with the largest number of producers (65'042), followed by Italy (45'969), Spain (30'462), Poland (25'944 in 2012), and France (25'467). A large number of the organic producers were in the EU-15 (almost 195'000), and 64'000 producers were in the EU-13. Since 2004, when, in Europe, more than 165'000 producers (EU: 140'000) were counted, their number has almost doubled (Table 56, Figure 71).

In Europe, there were more than 43'000 processors in 2013 (EU: almost 42'000). It should be noted, however, that not all countries have data on the number of organic processors in their countries. According to available data, an overwhelming part of the processors are in the EU-15 (more than 39'000). These figures, even though by far not as complete as the data on organic producers, show clearly that the processing infrastructure in many countries is not so well developed yet (Table 56, Figure 71).

In Europe, more than 1'600 importers were counted in 2013 (European Union: almost 1'400). Of the entities in the European Union, almost 90 percent were in the EU-15, showing the high importance of imports in these countries, most of which have well-developed markets. In the EU-13, as well as the EU candidates, the number of importers is still low (Table 56).

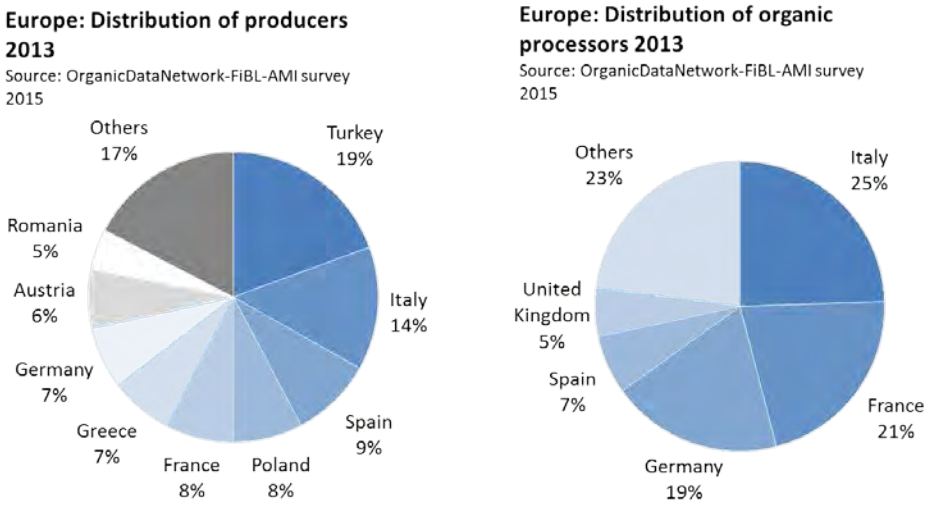


Figure 71: Distribution of organic producers and processors by country 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015, based on national data sources and Eurostat.

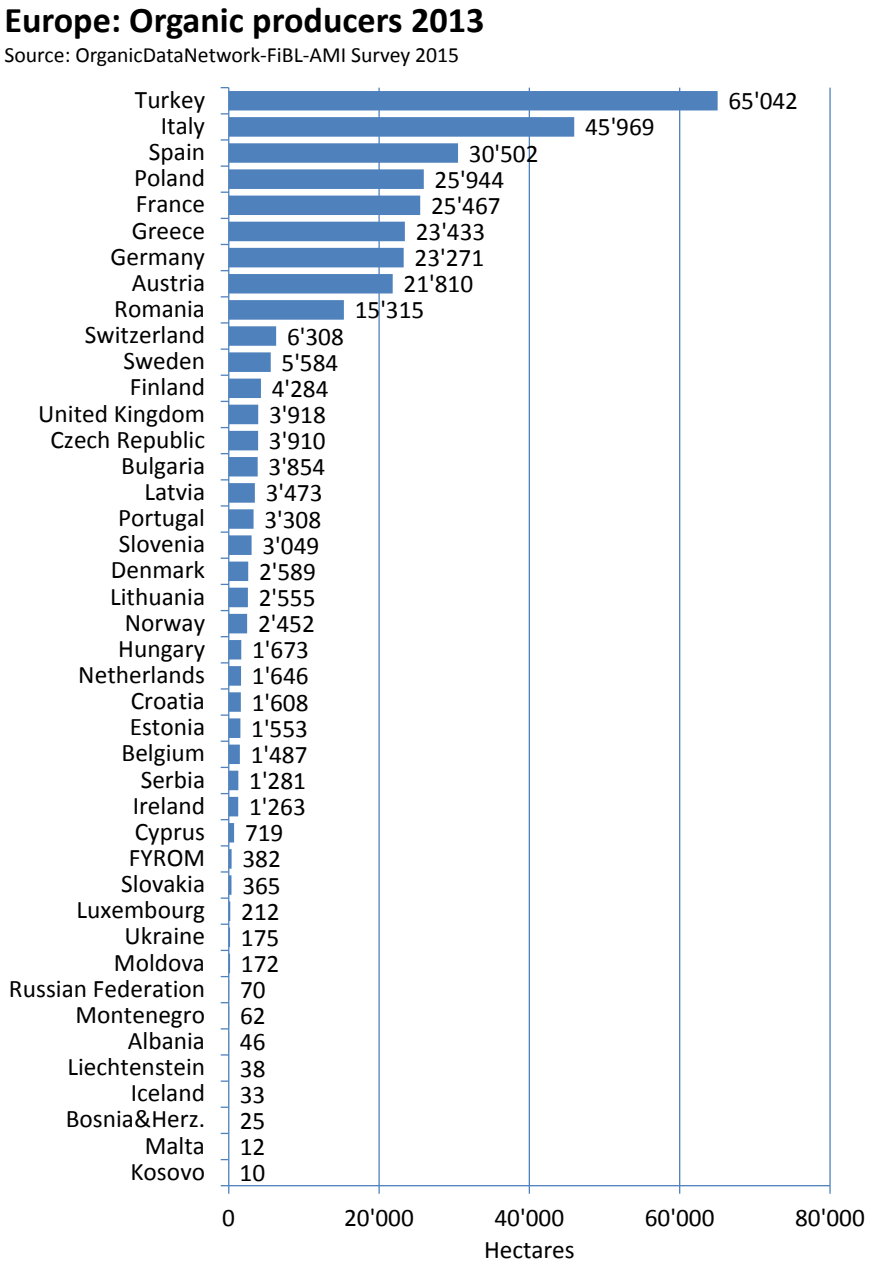


Figure 72: Europe: Numbers of producers 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2013 based on national data sources and Eurostat. Only countries with ten and more producers

Domestic market development

Retail sales by country

The organic market in Europe increased by 6 percent to 24.3 billion euros (EU: 22.2 billion euros). Unfortunately, not all countries provide data on their domestic markets on a regular base (Table 57, Figure 74).

Germany is the largest market (7.6 billion euros); it is, after the United States, the second biggest organic market in the world. France held second place with 4.4 billion. It is a market that has shown very dynamic growth in the past couple of years. The UK is in third place (2.1 billion euros), followed by Italy (2 billion euros) (Figure 73).

Comparing organic markets worldwide by a single market, the United States has the lead – 43 percent of global retail sales of organic products are in this country (24.3 billion euros), followed by the European Union. Comparing retail sales by continent, North America continues to be the largest market (26.5 billion euros) (Figure 73).

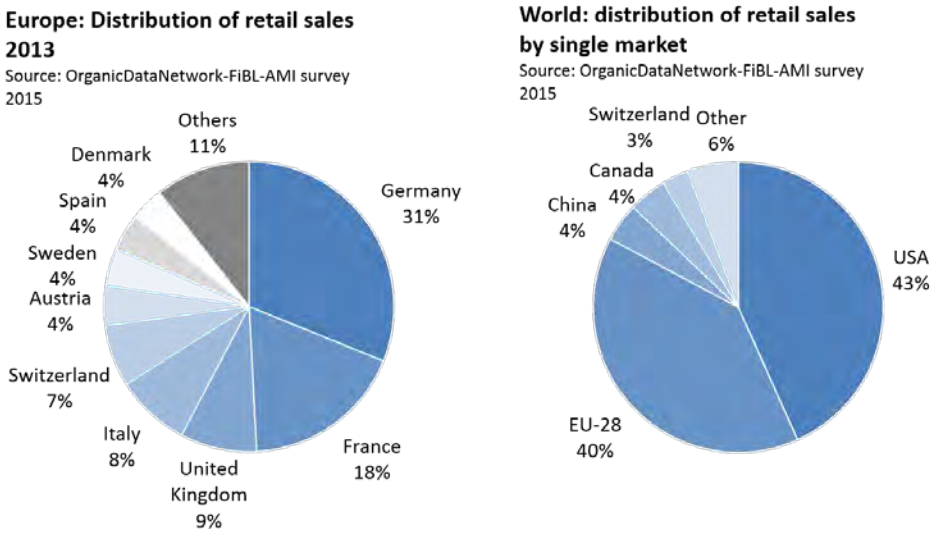


Figure 73: Distribution of retail sales in Europe 2013; Right: Distribution of retail sales by single market worldwide 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources

Europe: Organic retails sales value by country 2013

Source: OrganicDataNetwork-FiBL-AMI Survey 2015

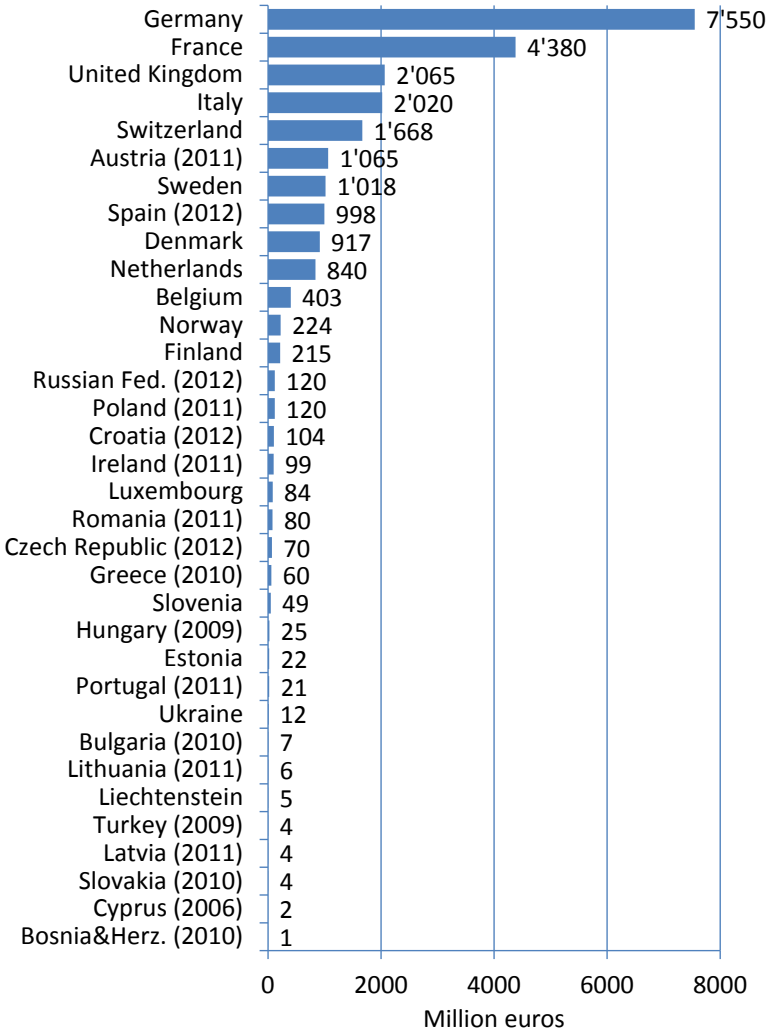


Figure 74: Europe: Retail sales by country 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data

Market growth

The organic market in Europe and the European Union increased by approximately 6 percent in 2013. All countries, for which new data was available, showed growth. Germany, the largest market in Europe, had a growth rate of 7 percent; in France, the market grew by 9 percent. Some countries such as Norway (+16 percent), Sweden (+12 percent), and Switzerland (+12 percent), showed double-digit growth. In the United Kingdom, where retail sales decreased for four consecutive years, a return to growth was noted in 2013 (+2.8 percent).

In 2014, in many European countries, the market experienced further significant growth, and growth rates were similar to those in 2013 (final figures are expected to be available in the first months of 2015). Consumer interest in organic products remains high, even though organic products have to compete more and more with sustainability and regional labels (Figure 75, Figure 76).

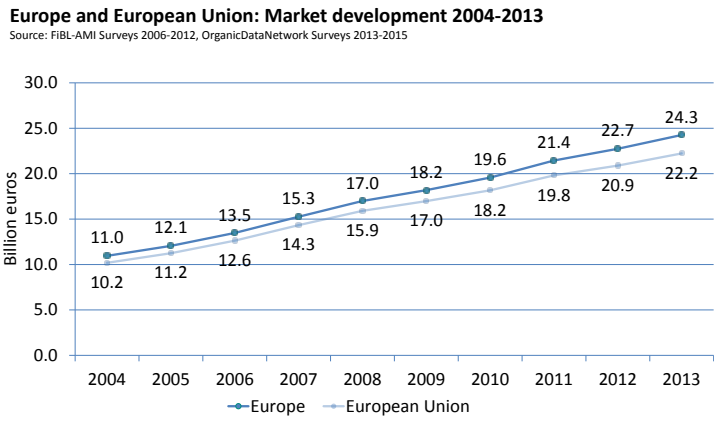


Figure 75: Organic retail sales in Europe and the EU, 2004-2013

Source: OrganicDataNetwork survey 2013 - 2015, FiBL-AMI survey 2006--2012

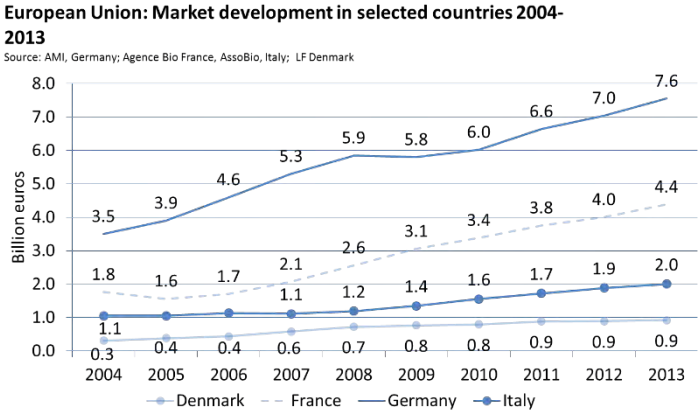


Figure 76: European Union: Market development in selected countries 2004-2013

Source: AMI, Germany; Agence Bio France; AssoBio, Italy; LF Denmark

Market shares and Purchasing Power Parities

The share organic retail sales have of all retail sales is an important indicator of the importance the organic market has in a given country. As in the past, the highest market shares were reached in Denmark (8 percent), Switzerland (6.9 percent), and Austria (6.5 percent in 2011) (Figure 76, Table 57).

The highest per-capita consumption of organic food in 2013 was in Switzerland (210 euros), Denmark (164 euros), Luxembourg (157 euros), Austria (127 euros in 2011), Sweden (107 euros), and Germany (93 euros). However, care must be taken in interpreting these figures as the costs of living differ quite considerably across countries.

The data on the per-capita consumption were, therefore, adjusted by Purchasing Power Parities. According to Eurostat (2014),

> "Purchasing power parities (PPPs) are indicators of price level differences across countries. PPPs tell us how many currency units a given quantity of goods and services costs in different countries. PPPs can thus be used as currency conversion rates to convert expenditures expressed in national currencies into an artificial common currency (the Purchasing Power Standard, PPS), eliminating the effect of price level differences across countries.
>
> The main use of PPPs is to convert national accounts aggregates, like the Gross Domestic Product (GDP) of different countries, into comparable volume aggregates. Applying nominal exchange rates in this process would overestimate the GDP of countries with high price levels relative to countries with low price levels. The use of PPPs ensures that the GDP of all countries is valued at a uniform price level and thus reflects only differences in the actual volume of the economy."

When looking at the per capita consumption adjusted for Purchasing power parities for food and non-alcoholic beverages (Eurostat 2014), a different picture emerges for the European countries, and the order of the countries changes. The first place is still held by Switzerland, but the gap between Switzerland, with its high cost of living, and the next countries is a lot smaller, and second in place is no longer Denmark, but Luxembourg (Figure 78).

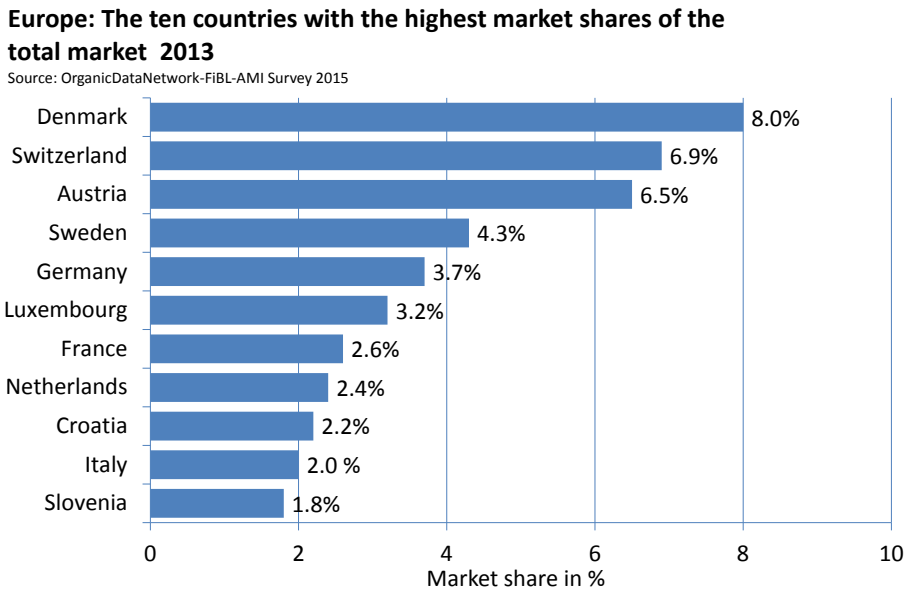


Figure 77: Europe: The ten countries with the highest market shares of the total retail sales 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2013 based on national data sources

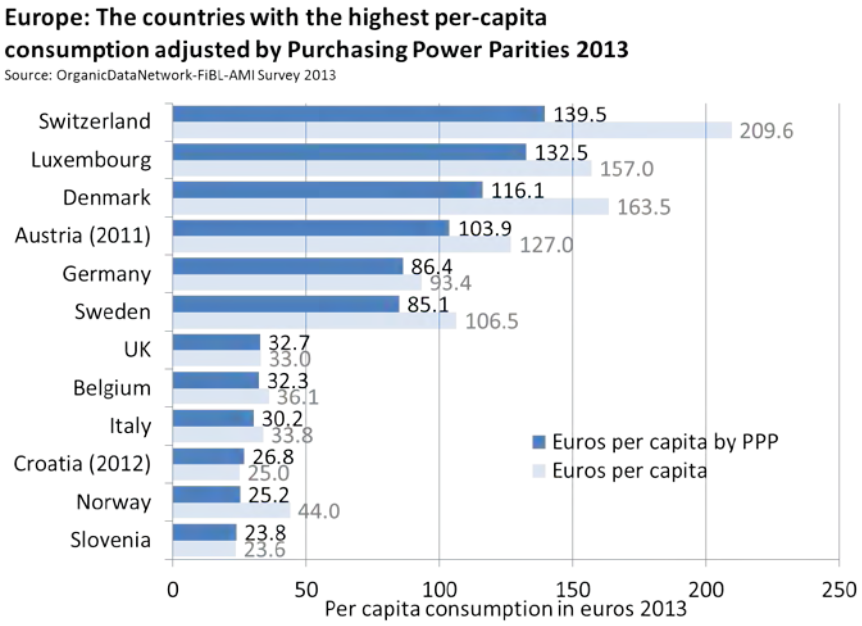


Figure 78: Europe: The 12 countries with the highest per capita consumption adjusted by purchasing power parity 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2013 based on national data sources

Shares of products and product groups with the organic segment

In many countries, the breakdown of the value of retail sales by product in millions of euros is only available for general retail, based on panel data. The figures communicated for a certain product and product group of the total market are often based on these data and do not take into account the other marketing channels. However, should be noted that, especially in countries, for which this is applied, the supermarkets have a very high market share of 80 to 90 percent.

Within the overall organic market in Europe, certain organic products are more dominant than others. The survey carried out as part of OrganicDataNetwork (Willer and Schaack 2014) shows (see also Figure 79, Figure 80, Figure 81, Figure 82):

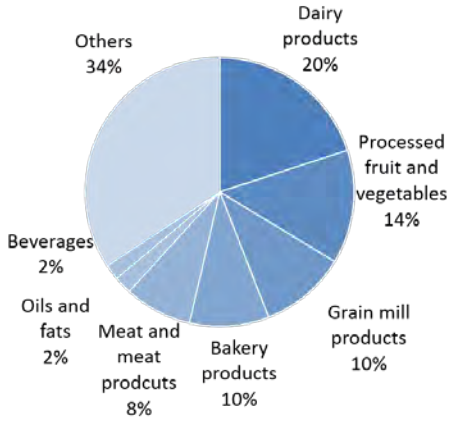
- Fruit and vegetables are the pioneer organic products in Europe. They now have shares around one fifth of many national organic markets. They are especially strong in Italy, Ireland, Norway, Sweden, and Germany. All over Europe, the organic market is dominated by fresh products compared to the conventional markets.
- In many countries and in Northern Europe in particular, animal products, especially milk and dairy products, constitute a high share of all organic products sold (up to 20 percent). Meat and meat products are very successful and constitute around 10 percent of the organic market in Belgium, the Netherlands, Finland, and France. On the other hand, in many countries, the meat and meat-based product market is not yet well-developed due to lack of manufacturing capacities and high price premiums compared to conventional products.
- Beverages – mainly wine – constitute an important part of the organic market – more than 10 percent in France and Croatia.
- Hot beverages (coffee, tea, and cocoa) cover 3 to 5 percent of the organic market.
- Grain mill products, which are easily sold and stored in supermarkets, reach high shares in the Czech Republic and also in Finland and Norway.
- Bread and bakery products have a high importance in the organic product range, with around 10 percent in Switzerland, the Netherlands, France, Sweden, Finland, and Germany.

For all countries that were covered by the survey and provided data for their markets (Austria, Czech Republic, Finland, France, Germany, Netherlands, Norway, Spain, Sweden, Switzerland, and the United Kingdom), the following can be said: A turnover of at least 3.3 billion euros of organic fruit and vegetables was made. Dairy products accounted for at least 2.9 billion euros, followed by meat and meat products (1.5 billion), bakery products (1.4 billion), and beverages (1.1 billion).

Again, it should be noted that the data are not complete for many countries. Either certain products are not covered at all by the national collection system, or the coverage is incomplete because, for example, only the sales in the general retailers are listed.

For more information, see the OrganicDataNetwork market database at www.organicdatanetwork.net/odn-statistics-data.html.

Czech Republic: Distribution of organic retail sales by product group 2012 (Total retail sales: 70 million Euros)
Source: UZEI 2014



France: Distribution of organic retail sales by product group 2013 (Total retail sales: 4.4 billion Euros)
Source: Agence Bio 2014

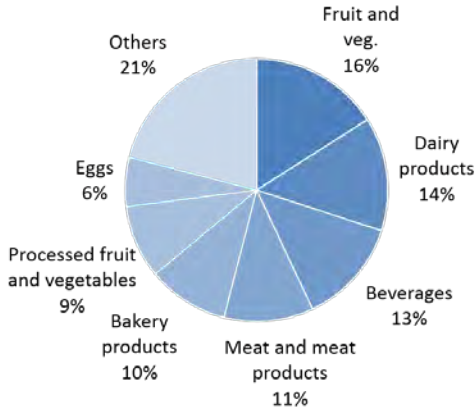
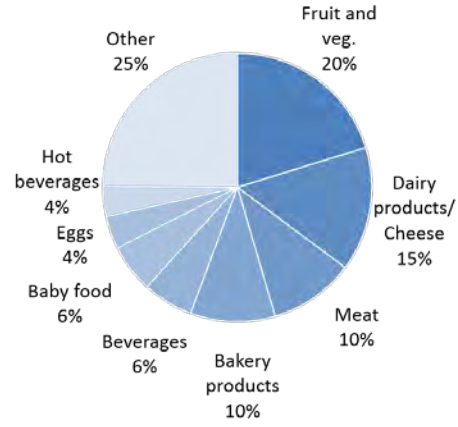


Figure 79: Czech Republic: Distribution of organic retail sales by product (group) 2012
Figure 80: France: Distribution of organic retail sales by product (group) 2013
Source: Czech Republic: UZEI; France: and Agence Bio

Germany: Distribution of organic retail sales by product group 2013 (Total retail sales: 7.6 billion Euros)
Source: AMI 2014



Switzerland: Distribution of organic retail sales by product group 2013 (Total retail sales: 1.7 billion euros)
Source: Bio Suisse 2014

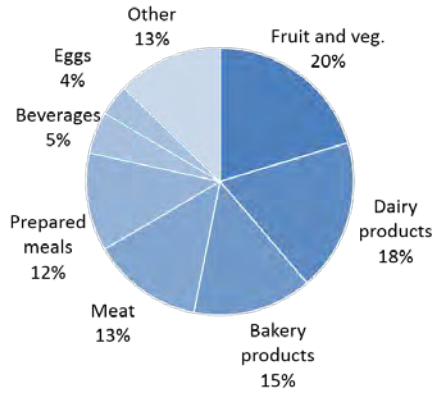


Figure 81: Germany: Distribution of organic retail sales by product (group) 2013
Figure 82: Switzerland: Distribution of organic retail sales by product (group) 2013
Source: Germany: AMI based on GfK household panel data; Switzerland: Bio Suisse

Comparison of organic products and product groups with the total market

In terms of organic market shares for organic products compared to their respective total market, one of the success stories in many European countries is eggs. According to the OrganicDataNetwork survey, they reach market shares of more than 20 percent in Switzerland and France and 10 percent or more in most of the countries for which data were available (see Table 52). The sales of eggs reflect the high concerns of consumers with regard to animal welfare and also the readiness to pay relatively high price premiums. In Germany, for example, organic eggs have, at minimum, double the price compared to conventional eggs – one of the highest price surpluses among the organic product groups.

After eggs, vegetables show the highest market shares of 8 to 13.5 percent of all vegetables sold in Switzerland, Austria, and Germany. In some countries, dairy products reach market shares of about 5 percent of all dairy products sold. In Switzerland, they even reach 10 percent. Single products can reach much higher market shares in the countries. Baby food (more than 40 percent in Germany) or meat substitutes (23 percent in Belgium and 60 percent in Germany) are good examples. Fresh carrots have a 30 percent market share in Germany. On the other hand, products like beverages and meat (especially poultry), generally have low market shares. Often these products are highly processed and/or very cheap in the conventional market (Table 52). For more information, see the OrganicDataNetwork market database at www.organicdatanetwork.net/odn-statistics-data.html.

Table 52: Shares of organic products and product groups of their respective total markets for selected countries 2013

Product group	Austria (2012)	Belgium	Finland	France	Germany	Nether-lands	Norway	Switzerland
Beverages				2.8%	1.7% (2012)		0.1%	2.6%
Bread and bakery products		1.5%		3.7%	5.9% (2012)	3.2%	0.9%	20 % bread
Cheese	7.5%		0.9%	1.2 %	3.5%		0.6%	6.3%
Eggs for consumption	18.3%	9.9%	12%	20.6 %	13.9%	12.7%	5.7 %	21.6%
Fruit	10.0%	3.3 %		3.9%	6.6%		1.0 %	9.2%
Meat and meat products	3.7%	1.3% (Meat)	0.8%	1.5%	2.1%	2.8%	0.3%	4.2%
Milk and dairy products		2.1%	2.5%	3%	5.6%	4.8%	1.6%	10.8%
Vegetables	11.6%	5.2 %	3.0% veg. & fruit	3.6 %	8.3%	3.9 % veg. & fruit	2.6%	13.5%

Compiled by: OrganicDataNetwork-FiBL-AMI 2015; Sources: Austria (only general retailers): RollAMA/AMA Marketing; Belgium (only general retailers): GfK Panel services Benelux; Finland: Pro Luomo, France: Agence Bio; Germany: AMI based on GfK household panel data; Netherlands: Bio Monitor; Norway: Norwegian Agriculture Agency (only general retailers); Switzerland (only general retailers): Bio Suisse

Note: Due to classifications and nomenclatures differing from country to country, it is not possible to supply data for all product groups, even if data for individual products may be available. Not all countries have data on the shares of organic products.

Marketing channels

Some countries are in a position to break down their retail sales data by marketing channel. Some are even able to provide a breakdown by product and marketing channel. Some countries have data for catering sales, in addition to total retail sales that include direct marketing and box schemes. Wherever possible, the figure for the catering sales was deducted from the figure for the total organic market.

Figure 83 on the marketing channels shows that the importance of the various marketing channels differs from country to country. In the past, countries with a strong involvement by general retailers showed a strong growth of their organic markets (e.g. Austria, Denmark, Switzerland, and United Kingdom). However, the financial crisis showed the danger of a strong dependence on supermarkets. In those years, in the UK, the market decreased, and in Germany, stagnation was noted for general retail sales, whereas it continued to grow in the specialized channels. France, Italy, and Germany are good examples of countries with strong market growth, while, at the same time, specialized retailers play a very important role. Growing levels of professionalization, including growing shop spaces, have contributed to this development. In Germany, a recent study has shown that Alnatura – an organic brand whose products are mostly sold in the organic supermarket chain of the same name as well as in the drugstore chain "dm"- was the most popular food brand in the country (Brandmeyer Markenberatung 2014).

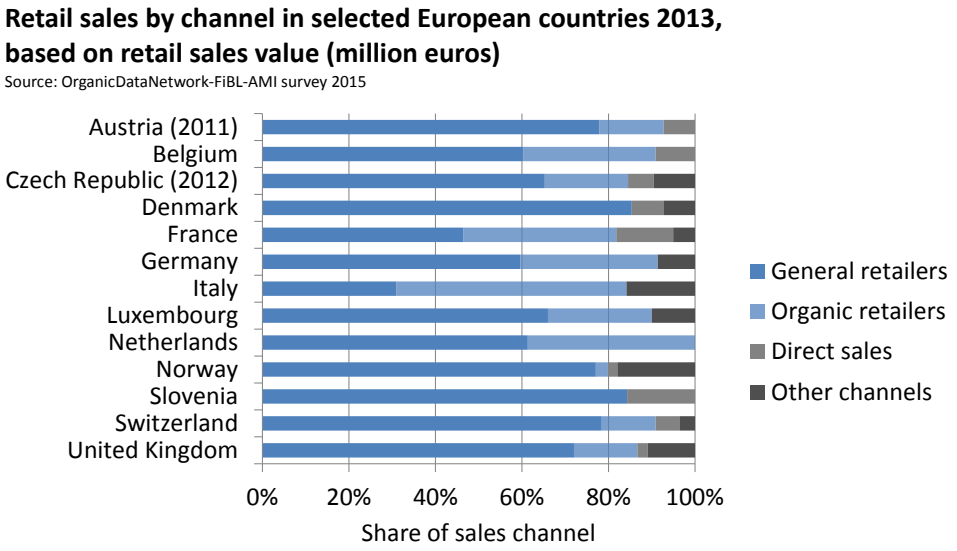


Figure 83: Europe: Marketing channels for organic products in selected countries 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources

International trade

In many countries, the growth of demand for organic products outpaces the growth of organic food supply. This is true, in particular, for the major markets such as Germany, France, and Switzerland. These countries do not only need products like coffee, bananas, or off-season fruits and vegetables, but also products that could be produced in the countries themselves. Generally, however, there is a strong preference for domestic products in the countries that farmers, processors, and politicians like to fulfil. Intra-EU trade and imports from third countries represent an important part of domestically consumed organic products. Dependence on imports (whether from EU member states or third countries) seems to be particularly high in the new member states and concerns primarily processed products.

A recent study from Germany shows that Germany is not only the largest market for organic products in Europe but also one of its largest organic producers. In spite of this fact, in business year 2012/13, Germany imported 6 to 94 percent of such organic raw or fresh products that could also have been produced in the country (Schaack et al., 2014). For example, 43 percent of the organic apples are imported (mainly from Italy) as well as 42 percent of the carrots (mainly from the Netherlands and Israel). Twenty-five percent of the wheat and 51 percent of grain maize came from other countries, mainly from Romania, Ukraine, Hungary, and others. Unfortunately, with the exception of Denmark, France, and recently Germany, no country supplies data on exports and imports on a regular basis, and it is difficult to draw clear conclusions on the developments of exports and imports in the European Union and Europe. The case of Denmark shows that, from 2003 to 2013, exports increased by 550 percent and imports by 500 percent.

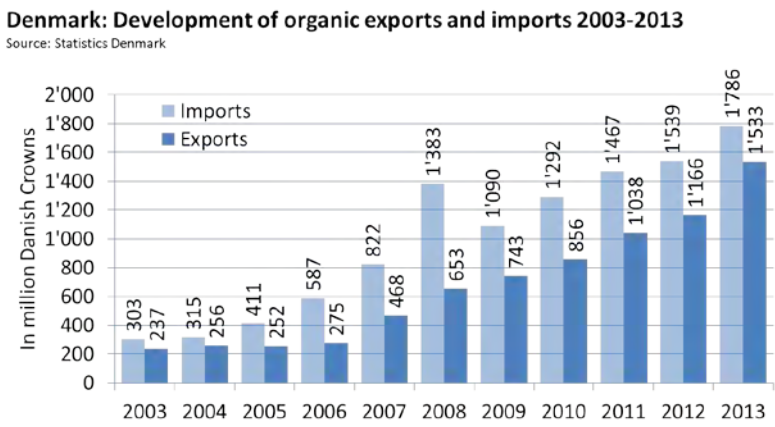


Figure 84: Denmark: Development of organic exports and imports 2003 to 2013
Source: Statistics Denmark 2015

Conclusion

Current available data on organic farming and the market in Europe and globally show that, in an international context, the European organic sector is well-developed. Relatively high shares of agricultural land, a continual growth of the area and number of operators, as well as a fast-growing market, show the exceptional dynamics that this market has in a global context.

The short data analysis provided in this report shows, however, that there are still large discrepancies among the countries. Even though some of countries in Central Eastern Europe have reached considerable shares of organic agricultural land, consumer spending, - although growing - remains low as a proportion of total spending on food in these countries. An issue of particular concern is the low number of processors, showing that the processing infrastructure - and thus the preconditions for adding value to organic products for export or, more importantly, for placing them on the domestic market - is still underdeveloped.

Another issue that needs to be solved is that of data availability. For instance, imports and exports play a very important role in trade within the European Union and for the its international trade with external partners, but almost no data exists. Furthermore, whilst the availability of domestic market data is improving, it is collected with a wide range of methods and, strictly speaking, is not accurately comparable. The OrganicDataNetwork project (www.organicdatanetwork.net), funded under the 7th research framework programme of the European Union, contributed to a more detailed overview of the European organic market. The main challenges that were encountered when storing organic market data in one common database were data gaps, incomplete data, inaccessible data; non-harmonized definitions, nomenclatures, and classification; and data consistency issues (Willer and Schaack 2014b). While the OrganicDataNetwork online database improves the availability and accessibility of organic market data, it also shows the current shortcomings clearly. Therefore, we recommend that data availability and accessibility be increased; that classifications, nomenclatures, and definitions, in particular for organic market data, be harmonized; and that data quality be improved (Willer and Schaack 2014a).

Acknowledgements

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Country tables: Abbreviations

- EU-15: Member countries in the European Union prior to the accession of ten candidate countries on 1 May 2004.The EU-15 are: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, United Kingdom.
- EU-13: The countries that became a member of the European Union in or after May 1, 2004: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia.
- CPC: The candidate and potential candidate countries of the European Union: Albania, Bosnia & Herzegovina, Iceland, Kosovo, The former Yugoslav Republic of Macedonia, Montenegro, Serbia , Turkey
- EFTA: European Free Trade Association: Iceland, Liechtenstein, Norway, Switzerland.

Organic Agriculture in Europe: Tables

Table 53: Europe: Organic agricultural land 2012 and 2013, growth and share of total agricultural land

Not for all countries 2013 data were available.

	Country	Area 2012 [ha]	Area 2013 [ha]	Share of total agr. land [%]	Change 2012-2013 [%]
EU [EU15]	Austria	537'706	526'689	19.5%	-2%
	Belgium	59'718	62'529	4.6%	+5%
	Denmark	175'113	169'298	6.4%	-3%
	Finland	197'751	206'170	9.0%	+4%
	France	1'032'941	1'060'756	3.9%	+3%
	Germany	1'034'355	1'060'669	6.4%	+3%
	Greece	462'618	383'606	4.6%	-17%
	Ireland	52'793	52'793	1.3%	
	Italy	1'167'362	1'317'177	10.3%	+13%
	Luxembourg	4'130	4'448	3.4%	+8%
	Netherlands	48'038	49'425	2.6%	+3%
	Portugal	200'151	271'532	8.1%	+36%
	Spain	1'593'197	1'610'129	6.5%	+1%
	Sweden	477'685	500'996	16.3%	+5%
	United Kingdom	590'009	567'751	3.3%	-4%
EU [EU15] total		*7'633'567*	*7'843'967*	*6.1%*	*+3%*
EU [EU13]	Bulgaria	39'137	56'287	1.8%	+44%
	Croatia	31'903	40'641	3.1%	+27%
	Cyprus	3'923	3'923	2.7%	
	Czech Republic	468'670	474'231	11.2%	+1%
	Estonia	144'150	151'256	16.0%	+5%
	Hungary	130'609	140'292	3.3%	+7%
	Latvia	195'658	200'433	11.0%	+2%
	Lithuania	156'539	166'330	5.7%	6%
	Malta	37	37	0.4%	
	Poland	661'956	661'956	4.3%	
	Romania	288'261	288'261	2.1%	
	Slovakia	166'700	166'700	8.8%	
	Slovenia	35'101	38'664	8.4%	+10%
EU [EU13] total		*2'322'643*	*2'389'010*	*4.7%*	*+3%*
CPC	Albania	515	662	0.1%	+29%
	Bosnia and Herzegovina	343	292	0.0%	-51%
	Kosovo	111	114	0.0%	+3%
	Macedonia (FYROM)	12'731	3'146	0.3%	-75%
	Montenegro	3'068	3'068	0.6%	
	Serbia	6'340	8'228	0.2%	+30%
	Turkey	523'627	461'396	1.9%	-12%
CPC total		*546'735*	*476'906*	*1.4%*	*-13%*
EFTA	Iceland	8'240	9'710	0.4%	+18%
	Liechtenstein	1'086	1'137	31.0%	+5%
	Norway	55'260	51'662	4.8%	-7%
	Switzerland	125'961	128'140	12.2%	+2%
EFTA total		*190'547*	*190'649*	*4.3%*	
other European countries	Andorra		1	0.0%	-
	Belarus			0.0%	-
	Channel Islands	260	260	3.0%	
	Faroe Islands	253	253	8.4%	
	Moldova	22'102	22'102	0.9%	
	Russian Federation	146'251	144'255	0.1%	-1%
	Ukraine	272'850	393'400	1.0%	+44%
other European countries total		*441'716*	*560'271*	*0.2%*	*+27%*
Total Europe		**11'135'208**	**11'460'773**	**2.4%**	**+3%**
European Union		**9'956'210**	**10'232'947**	**5.7%**	**+3%**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2015 based on Eurostat and national data sources. For data sources see annex, page 281

Table 54: Europe: Land use in organic agriculture 2012 and 2013

Main use	Main crop category	Area 2012 [ha]	Area 2013 [ha]	Change 2012/2013 [%]
Agricultural land and crops, no details	Agricultural land and crops, no details	124'836	226'394	+81%
Arable land crops	Arable crops, no details	78'835	130'277	+65%
	Cereals	1'902'703	1'844'578	-3%
	Flowers and ornamental plants	9'594	7'417	-23%
	Green fodder from arable land	1'962'504	1'910'391	-3%
	Hops	192	183	-4%
	Industrial crops	6'596	10'290	+56%
	Medicinal and aromatic plants	32'455	40'787	+26%
	Mushrooms and truffles	302	180	-40%
	Oilseeds	192'591	190'419	-1%
	Protein crops	245'640	226'947	-8%
	Root crops	45'834	40'011	-13%
	Seeds and seedlings	3'720	3'991	+7%
	Strawberries	2'954	3'311	+12%
	Sugarcane		3	-
	Textile crops	13'386	9'244	-31%
	Tobacco	914	1'133	+24%
	Vegetables	104'757	105'123	0
	Arable land, other	59'714	75'087	+26%
Arable land crops total		*4'662'691*	*4'599'369*	*-1%*
Cropland, no details		2'031	72'187	+3453%
Permanent crops	Berries	28'257	29'170	+3%
	Citrus fruit	34'196	37'347	+9%
	Flowers and ornamental plants, permanent	13	-	-100%
	Fruit, no details	7'579	2'617	-65%
	Fruit, temperate	125'761	138'566	+10%
	Fruit, tropical and subtropical	16'444	24'494	+49%
	Grapes	241'622	258'348	+7%
	Medicinal and aromatic plants, permanent	1'626	1'541	-5%
	Nurseries	82	720	+779%
	Nuts	172'425	187'515	9%
	Olives	456'373	478'445	+5%
	Tea/mate	175	34	-81%
	Permanent crops, other	12'010	137'275	+1043%
Permanent crops total		*1'096'562*	*1'296'073*	*18%*
Permanent grassland	Pastures and meadows	4'923'961	4'828'810	-2%
Other agricultural land total		*325'126*	*437'939*	*+35%*
Total		**11'135'208**	**11'460'773**	**+3%**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2015 based on Eurostat and national data sources. For data sources see annex, page 281

Table 55: Europe: All organic areas 2013

Country	Agri-culture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Albania	662				330'677		331'339
Andorra	1						1
Austria	526'689						526'689
Belarus					2'742		2'742
Belgium	62'529				3	152	62'684
Bosnia and Herzegovina	292				63'910		64'202
Bulgaria	56'287				679'845		736'132
Channel Islands	260						260
Croatia	40'641				8		40'648
Cyprus	3'923						3'923
Czech Republic	474'231						474'231
Denmark	169'298				2'648		171'946
Estonia	151'256			2'135	40'579		193'969
Faroe Islands	253						253
Finland	206'170				9'000'000		9'206'170
France	1'060'756	1			2'809		1'063'566
Germany	1'060'669						1'060'669
Greece	383'606						383'606
Hungary	140'292						140'292
Iceland	9'710			7'727	212'763		230'200
Ireland	52'793						52'793
Italy	1'317'177				62'647		1'379'824
Kosovo	114						114
Latvia	200'433						200'433
Liechtenstein	1'137						1'137
Lithuania	166'330	5'049				747	172'125
Luxembourg	4'448						4'448
Macedonia (FYROM)	3'146			8'112	198'000		209'258
Malta	37						37
Moldova	22'102						22'102
Montenegro	3'068				139'809		142'877
Netherlands	49'394						49'394
Norway	51'662						51'662
Poland	661'956						661'956
Portugal	271'532		19'533				291'065
Romania	288'261				1'082'138		1'370'399
Russian Federation	144'254				13'723		157'977
Serbia	8'228						8'228
Slovakia	166'700						166'700
Slovenia	38'665						38'665
Spain	1'610'129				38'184	11'603	1'659'916
Sweden	500'996					3'057	504'053
Switzerland	128'140			6'121			134'261
Turkey	461'396				957'261		1'418'657
Ukraine	393'400				530'000		923'400
United Kingdom	567'751		7'597				575'348
Total	**11'460'773**	**5'050**	**27'130**	**24'094**	**13'357'745**	**15'559**	**24'890'350**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2015 based on Eurostat and national data sources For data sources see annex, page 281

Table 56: Europe: Organic producers, processors and importers by country group, 2013

Country group	Country	Producers	Processors	Importers
EU [EU13]	Bulgaria	3'854	92	3
	Croatia	1'608	61	34
	Cyprus	719	53	
	Czech Republic	3'910	471	89
	Estonia	1'553	84	
	Hungary	1'673	371	15
	Latvia	3'473	192	7
	Lithuania	2'555	108	
	Malta	12	4	2
	Poland	25'944	312	30
	Romania	15'315	105	3
	Slovakia	365	41	5
	Slovenia	3'049	193	9
EU [EU13] total		*64'030*	*2'087*	*197*
EU [EU15]	Austria	21'810		
	Belgium	1'487	787	121
	Denmark	2'589	760	
	Finland	4'284	558	72
	France	25'467	9'297	181
	Germany	23'271	8'293	308
	Greece	23'433	1'551	4
	Ireland	1'263	211	33
	Italy	45'969	10'610	260
	Luxembourg	212	43	3
	Netherlands	1'646	1'035	
	Portugal	3'308	470	7
	Spain	30'502	2'842	112
	Sweden	5'584	762	33
	United Kingdom	3'918	2'332	95
EU [EU15] total		*194'743*	*39'551*	*1'229*
CPC	Albania	46	27	4
	Bosnia and Herzegovina	24	8	
	Kosovo	10	10	
	Macedonia (FYROM)	382	7	2
	Montenegro	62	1	
	Serbia	1'281	49	33
	Turkey	65'042	118	35
CPC total		*66'847*	*220*	*74*
EFTA	Iceland	33	26	2
	Liechtenstein	38		
	Norway	2'452	496	72
	Switzerland	6'308	847	
EFTA total		*8'831*	*1'369*	*74*
other European countries	Andorra		1	
	Faroe Islands		1	
	Moldova	172		
	Russian Federation	70	39	
	San Marino		2	
	Ukraine	175	59	41
other European countries total		*419*	*103*	*41*
Europe total		**334'870**	**43'330**	**1'615**
European Union		**258'773**	**41'638**	**1'426**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources
CPC countries: EU candidate and potential candidate countries

Table 57: Europe: The market for organic food 2013

	Country	Year	Retail sales [Mio €]	€/person	Retail sales growth 2012/2013[%]	Retail sales: Share value [%]	Catering [Mio €]
EU [EU15]	Austria	2011	1'065	127		6.5%	64
	Belgium	2013	403	36	8.0 %	1.6%	
	Denmark	2013	917	163	5.2%	8.0%	127
	Finland	2013	215		6.4%	1.6%	
	France	2013	4'380		9.0%	2.6%	172
	Germany	2013	7'550	93	7.0%	3.7%	
	Greece	2010	60	5		0.4%	
	Ireland	2012	99	22		0.7%	
	Italy	2013	2'020	31	6.2%	2.0%	300
	Luxembourg	2013	84	157		3.2%	
	Netherlands	2013	840		5.4%	2.4%	144
	Portugal	2012	21	2		0.2%	
	Spain	2012	998	21		1.0%	
	Sweden	2013	1'018	106	11.5%	4.3%	
	United Kingdom	2013	2'065	33	2.8%		21
EU [EU15] total			*21'735*				
EU [EU13]	Bulgaria	2010	7	1			
	Croatia	2012	104	25		2.2%	
	Cyprus	2006	2	2			
	Czech Republic	2012	70	7		0.7%	1
	Estonia	2013	22	17		1.6%	
	Hungary	2009	25	2		0.3%	
	Latvia	2011	4	2		0.2%	
	Lithuania	2011	6	2		0.2%	
	Poland	2011	120	3		0.2%	
	Romania	2011	80	4		0.7%	
	Slovakia	2010	4	1		0.2%	
	Slovenia	2013	49	24	10.0%	1.8%	
EU [EU13] total			*492*				
CPC	Bosnia and Herzegovina	2013	1				
	Montenegro	2013					
	Turkey	2009	4				
CPC total							
EFTA	Liechtenstein	2012	5	129			
	Norway	2013	224	44	16.0%	1.1%	14
	Switzerland	2013	1'668	210	12.1%	6.9%	
EFTA total			*1'897*				
other European countries	Russian Federation	2012	120	1			
	Ukraine	2013	12	0			
other European countries total			*132*				
Europe			**24'260**	**32.6**	**Approx. 6%**		
European Union			**22'227**	**43.8**	**Approx. 6%**		

Source: OrganicDataNetwork survey based on national data sources and FiBL-AMI survey 2015. For details on data sources see annex, page 281

Note on table

› Blank cells: no information available

- Where no published data exists, best estimates from a range of experts have been used, but these were not available for all cases, so sometimes earlier estimates are shown.
- Values published in national currencies were converted to euros using the 2013 average exchange rates according to the Central European bank.
- Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.
- For details on data sources please see annex.
- Corrections, revisions and updates should be sent to helga.willer@fibl.org
- Corrections and revisions will be posted at www.organic-world.net

Sources for retail sales value

Austria: Organic Retailers Association; Belgium: Bioforum, VLAM and GfK; Bosnia and Herzegovina: Ecozept; Bulgaria: Bioselena; Croatia: Darko Znaor, private consultant; Cyprus: Ecozept; Czech Republic: UZEI; Denmark: Danish Agriculture & Food Council/Organic Denmark/Statistics Denmark; Estonia: Centre of Ecological Engineering; Finland: Pro Luomo; France: Agence Bio; Germany: AMI; Greece: N. van der Smissen; Hungary: Biokorsar Survey; Ireland: Bord Bia; Italy: AssoBio; Latvia: Ekoconnect; Liechtenstein: KBA; Lithuania: Ekoconnect; Luxembourg: Biogros estimate; IBLA; Montenegro: Ecozept; Netherlands: Bionext, Bio-Monitor; Norway: Norwegian Agricultural Authority SLF; Poland: IFOAM EU estimate; Portugal: Interbio; Romania: BCG-Global Advisors; Russian Federation: Eco-Control; Serbia: Ecozept; Slovakia: Ecozept; Slovenia: ISD; Spain: MAGRAMA; Sweden: SCB; Switzerland: BIO SUISSE; Turkey: MARA; Ukraine: Organic Federation of Ukraine; United Kingdom: Soil Association

Mediterranean Region

Organic Agriculture in the Mediterranean Region: Updates[1]

PATRIZIA PUGLIESE,[2] MARIE REINE BTEICH,[3] AND LINA AL-BITAR[4]

Structural aspects and trends 2014

According to the latest survey of the Mediterranean Organic Agriculture Network (MOAN) on organic agriculture in the Mediterranean region (September 2014), there are about 5.7 million hectares of organic agricultural land, mostly located in the Mediterranean (EU Med) countries of the European Union that, overall, account for 86.6 percent of the Mediterranean organic agricultural land and about one sixth of the world's organic agricultural area. Both the candidate and potential candidate (CPC) countries of the European Union and the Southern and Eastern Mediterranean (SEM) countries contribute respectively by 8.3 and 5.1 percent of the organic agricultural land in the Mediterranean region. The leading EU countries with the largest areas of organic agricultural land are Spain, Italy, and France. Among the CPC countries, the country with the largest organic agricultural land is Turkey, whereas, for SEM countries, most of the agricultural land is located in Tunisia and Egypt.

When organic-certified forests and areas devoted to wild collection (berries, medicinal and aromatic plants, mushrooms, natural grazing areas, etc.) are considered, the total organic land area increases to over 7.7 million hectares, corresponding to about one tenth of the world's total organic area. While in EU Med countries, the difference between the organic agricultural area and the total land area is almost non-existent, in non-EU Med countries, particularly in the CPC countries, the organic area increases threefold when including the forests and wild collection land area. Almost all CPC countries have important wild collection land areas, particularly Turkey. In the SEM countries, the leading country, in terms of wild collection, is Morocco. There are almost 208'000 organic operators in the Mediterranean region, mainly located in the EU and CPC countries. The countries with the highest number of producers are Turkey, Italy, France, and Spain.

The future growth prospects of the Mediterranean sector are linked to a strategic vision focused on cooperation among different actors in various areas (legislation, policies, information, research and extension, market, etc.) with a view to achieve a more harmonious and sound development of the sector, not only in each single national but mainly in the international context.

[1] Patrizia Pugliese, Marie Reine Bteich and Lina Al-Bitar (eds.) (2014) Mediterranean Organic Agriculture key Features, recent Facts, latest Figures Report 2014. Mediterranean Organic Agriculture Network (MOAN), CIHEAM Bari. Available at http://moan.iamb.it/index.php?option=com_phocadownload&view=category&id=8&Itemid=94

[2] Patrizia Pugliese, CIHEAM-Bari, Istituto Agronomico Mediterraneo di Bari, Via Ceglie, 9, 70010 Valenzano, Italy, www.iamb.it.

[3] Marie Reine Bteich, CIHEAM-Bari, Istituto Agronomico Mediterraneo di Bari, Via Ceglie, 9, 70010 Valenzano, Italy, www.iamb.it.

[4] Lina Al-Bitar, CIHEAM-Bari, Istituto Agronomico Mediterraneo di Bari, Via Ceglie, 9, 70010 Valenzano, Italy. www.iamb.it.

Table 58: Organic statistics in the EU, candidate and potential candidate (CPC) and southern and eastern Mediterranean (SEM) countries 2013

	Country	Total organic agricultural area (ha)	Total organic area[a] (ha)	Organic operators (number)
EU Med Countries	Croatia	40'641	40'648	1'830
	Cyprus[b]	3'923	3'923	
	France	1'060'756	1'060'756	38'044
	Greece[b]	462'618	462'618	
	Italy	1'317'177	1'379'824	52'383
	Malta	37	37	18
	Portugal	271'532	271'532	3'577
	Slovenia	38'664	38'664	3'255
	Spain	1'756'548	1'808'492	34'277
	EU Med total	*4'951'896*	*5'066'494*	*133'384*
Candidates and Potential candidates Countries	Albania	662	330'885	51
	Bosnia & Herzegovina	n.a.	n.a.	
	FYROM	3'146	201'146	394
	Montenegro	2'946	142'755	100
	Serbia	8'228	8'228	1'386
	Turkey	461'396	768'456	65'765
	CPC total	*476'378*	*1'451'470*	*67'696*
Southern and Eastern Med Countries	Algeria	700	700	57
	Egypt	85'801	85'801	100
	Jordan	2'898	2'898	54
	Lebanon	2'571	2'571	238
	Libya	-	-	-
	Morocco	8'660	870'250	200
	Palestinian Authority	6'354	6'354	832
	Syria	19'987	27'987	2'458
	Tunisia	162'323	221'750	2'810
	SEM total	*289'294*	*1'218'311*	*6'749*
	Total	5'717'568	5'717'568	7'736'275

Source: CIHEAM-Bari, Istituto Agronomico Mediterraneo di Bari
(a) Includes wild collection areas and forests, if any.
(b) Eurostat data
Editors' note: the data in this table partly differ from those collected by FiBL and IFOAM. Not all data in this table are from 2013.

Spotlight on the organic exports in the Mediterranean region

Over the last few years, organic agriculture has gained increasing interest and consent in the Mediterranean region; thus attracting the attention of local governments and economic operators and finding space in discussion platforms and official strategy papers. Despite the fact that each country has its own history, there are common traits and dynamics. In almost all SEM countries and some CPC countries, the concept of organic agriculture has gained much attention for two main reasons: (i) the interest of European stakeholders in new market suppliers to meet the growing demand of European consumers and (ii) the interest of local operators for new commercial opportunities which, in most cases, are essentially linked to export activities since the local market is still in its infancy, except for a few countries, like Croatia and Lebanon, where the local market is quite well developed.

In recent times, in many countries of the region, the development of organics has been also pushed by a growing political interest and rising public awareness about the ecological and social impacts of organic agriculture, but export remains a key driving force in most of the SEM (chiefly in Egypt, Morocco, and Tunisia) and the CPC (chiefly in Bosnia and Herzegovina, Serbia, and Turkey) countries. Following the recent fraud cases of organic products detected on the EU markets and the latest amendments to the EU regulations for imports from third countries, the need for an effective control system for organic exports (and imports) has emerged as an important issue in the national organic debate of many SEM and CPC countries. This has attracted the attention of local authorities and stakeholders and led, in some cases, to concrete action to establish or enhance the national organic information system with specific references to organic trade activities. Regular and accurate collection of data about organic export product types, volumes, and destinations represents a crucial step for control and monitoring procedures; therefore, the availability of such data (among others) has been investigated by MOAN in its member countries and, in particular, in non-EU Med countries, for some years now.

More recently, from 2012 to 2014, in the framework of the activities carried out for the EU-funded OrganicDataNetwork project (Data network for better European organic market information, www.organicdatanetwork.net), some in-depth case studies have also been conducted in selected countries. The project was a good opportunity for the Mediterranean Organic Agriculture Network to deepen its knowledge of the institutional architecture behind national organic statistics, helping to identify existing problems and test some proposals for solutions. Based on the outcomes of such activities as well as on complementary survey work, in the next paragraphs, available organic export data are presented for three countries—Morocco, Serbia, and Tunisia—with a strong export-oriented organic sector and an established national system for organic export data collection. For Morocco and Serbia, detailed organic export data are officially disseminated for the first time within the international organic community.

Morocco[1]

In Morocco, data collection, storage, and the dissemination of food export data, including organic, are officially carried out by the Food Export Control and Coordination Organization (*Etablissement Autonome de Contrôle et Coordination et des Exportations*, EACCE), a government body, under the supervision of the Ministry of Agriculture and Maritime Fishing (*Ministère de l'Agriculture et de la Pêche Maritime, MAPM*). EACCE is in charge of the quality control of food export products and of processing plants as well as with the coordination of exporting activities and operators. Administrative data on organic exports are collected by EACCE inspectors operating in EACCE regional delegations and entered into a centrally managed database from which they are extracted and disseminated, often upon request, to other government agencies and the private sector. The export-oriented activities drive most of the Moroccan organic sector's revenue, which amounted in 2013 to nine million euros for 8'000 tons of products.

Early fruits and vegetables is the leading export category and mainly includes zucchini, pepper, tomato, melon, cucumber, and strawberry (Figure 85). Processed plant products

[1] Text based on the manuscript on Morocco by Allal Chibane and Ghizlane Amazzal, 2014, in Pugliese et al. 2014

(with argan oil and frozen orange juice as predominant products) constitute more than one-fifth of the total export amount. This category also includes medicinal and aromatic plant products (15 percent of the category's total volume, with thyme, rosemary, and verbena being the most important products). The citrus fruit category (mostly oranges and small citrus fruits) is also important, with 18 percent of total organic export volume. It is important to highlight that several organic exports are also protected geographical indications according to the national legislation, a combination of quality concepts, labels, and certifications that Morocco is actively promoting.

In December 2013, an International Symposium on Mediterranean Organic Agriculture and Quality Signs related to Origin was successfully organised in Agadir, Morocco (www.agadir2013.org). At this conference, the state-of-the-art and recent developments in legislation, certification, and research were discussed. The conference also provided an opportunity for valuable exchange between the two communities of practitioners and academics operating in the organic sector, on the one hand, and in the field of local products (*produits de terroir*), on the other. A large share of producers of Moroccan *produits de terroir* respect organic agriculture principles and practices, but some of them do not acquire organic certification (and its commercial benefits) for their products due to budget constraints.

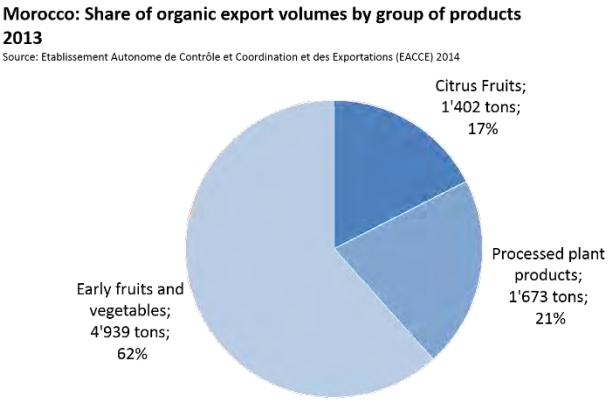

Figure 85: Morocco: Share of organic export volumes by group of products 2013
Source: Etablissement Autonome de Contrôle et Coordination et des Exportations (EACCE) 2014.

The EU is the main destination market for Moroccan organic exports, with France, Germany, and Switzerland as the top three importing countries. France imports about 90 percent of the citrus fruits and 80 percent of the processed plant products, which includes medicinal and aromatic plants products. Germany is the leading importer for early fruits and vegetables (61 percent of the total export of the category), followed by Switzerland (12 percent) (Figure 85).

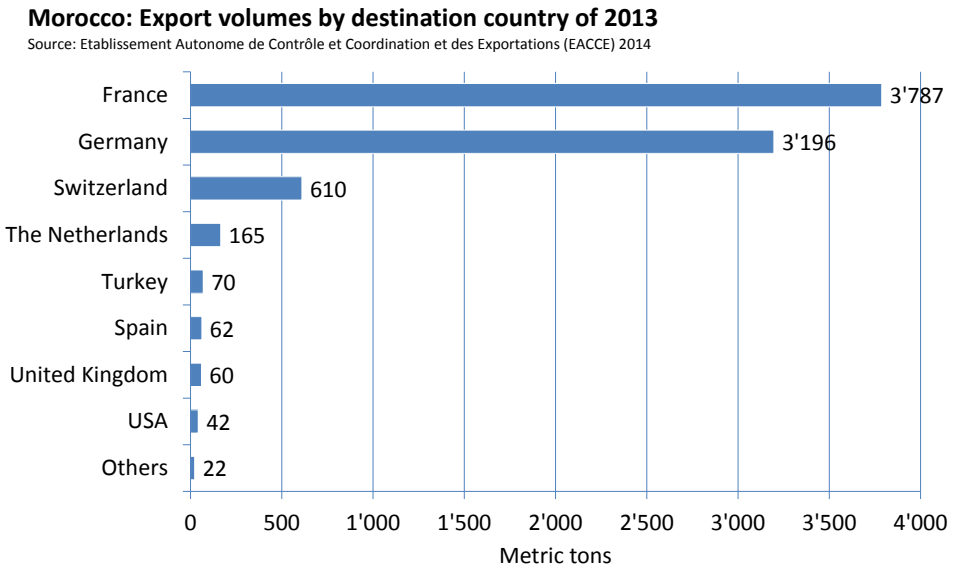

Figure 86: Morocco: Export volume by destination country 2013

Source: Etablissement Autonome de Contrôle et Coordination et des Exportations (EACCE) 2014.

Since 2000, export volumes have increased but show fluctuating performance partially due to naturally variable production outcomes and climate conditions (Figure 87). In 2013, exports of citrus fruits began to drift upward again after a couple of years of decline. In the same year, processed plant products showed a negative trend in volume (especially affecting orange juice) compensated by a steady increase in value, mainly due to a general positive trend for exports of high value-added products such as organic argan oil.

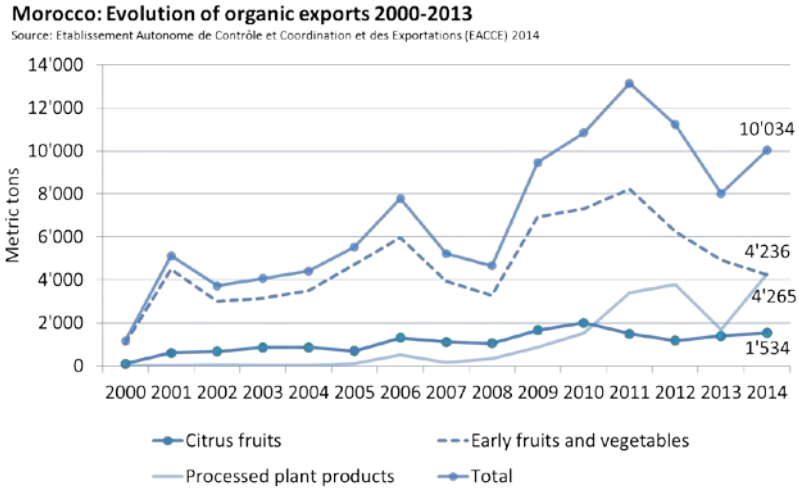

Figure 87: Morocco: Evolution of organic exports 2000-2013

Source: Etablissement Autonome de Contrôle et Coordination et des Exportations (EACCE) 2014.

Serbia[1]

In Serbia, data on organic export volumes and values of organic products are collected by customs and control bodies. The Ministry of Agriculture and Environmental Protection (MAEP) considers the customs data as official; data from control bodies are considered as projections of probable exports. At customs, information on organic exporters and exports is collected by means of the customs declaration, as organic products have to be reported together with the number of the certificate attached to the customs declaration. Organic products are classified, according to the EU Customs Tariff Nomenclature, by the Stabilisation and Association Agreement with the European Commission. However, export values are often missing or roughly estimated, as exporters do not want to declare the exact value of their products. Frozen and fresh fruits and fruit juice concentrates are the main exported Serbian organic products. In 2012, export volumes amounted to 1.6 million tons for a value estimated at 4 million euros. The leading exported organic product is raspberries (40.9 percent), followed by fruit juice concentrates (22.2 percent) and plums (13.5 percent) (Figure 88).

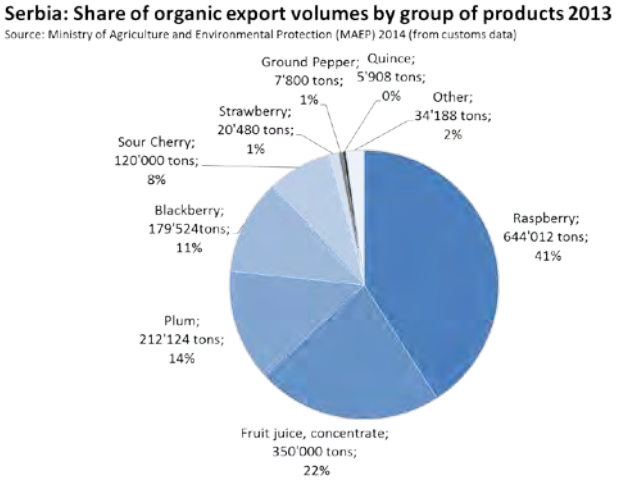

Figure 88: Serbia: Share of organic export volumes by group of products 2013
Source: Ministry of Agriculture and Environmental Protection (MAEP) 2014 (from customs data).

The European Union is the main destination market for the Serbian organic exports, with Austria, Germany, and the Netherlands being the top three importing countries. The destination countries of raspberries are mainly Germany (30 percent), the USA (25 percent), and Austria (22 percent), while 85 percent of the total export of fruit juice concentrates is sold to Austria; Italy is the leading importer of plums (58 percent of the total export of the crop). Belgium, Poland, and Japan import raspberries exclusively. In 2013, an increase of the total exported volume (7.1 million tons) was registered, for an estimated value of more than 10 million euros (Figure 89).

[1] Text based on the manuscript on Serbia by Jelena Milić and Jelena Vasilijevic, 2014, in Pugliese et al. 2014

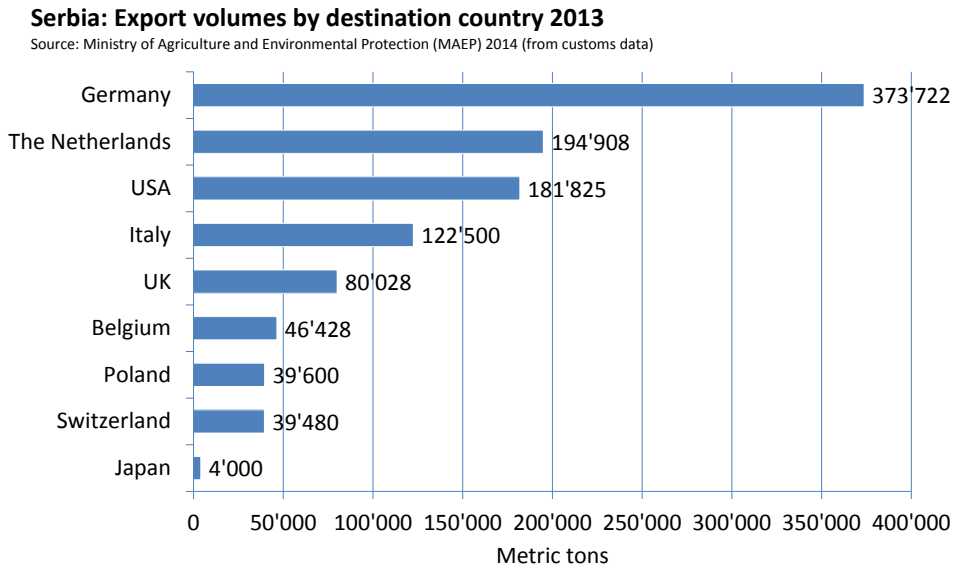

Figure 89: Serbia: Export volumes by destination country 2013

Source: Ministry of Agriculture and Environmental Protection (MAEP) 2014 (from customs data)

Tunisia[1]

In Tunisia, the ministerial department dedicated to organic agriculture matters, the *Direction Générale de l'Agriculture Biologique* (DGAB), established a system for export authorization to identify organic exports and gather relevant data, as there is no specific classification code at the customs level for organic imports and exports. The DGAB grants export authorisations only for products that are certified by an authorised control body after examination of a technical dossier, which is specifically prepared to provide evidence of the fulfilment of the required conditions. This technical file allows the DGAB to have a complete and continuous monitoring and to keep records of all export operations. All collected information are stored in a database at the DGAB. They are processed yearly and made publicly available on the websites of the Ministry of Agriculture (www.agriculture.tn; in Arabic) and the CTAB (www.ctab.nat.tn). The DGAB also closely monitors the annual performances, in terms of organic areas, production, and exports, against annual forecasts included in the national strategy for the sector, which are calculated by crop category and based on the assessment of regional potential.

Overall, in 2013, Tunisian organic exports amounted to 21.1 thousand tons, corresponding to a total value of 116 million Tunisian Dinars (54 million euros). Traditionally, organic olive oil and dates are the most popular Tunisian organic exports, accounting together for more than 90 percent of the total export value in 2012. Diversification of organic production and exports has been strongly encouraged; therefore, over time, the range of exported products has become quite wide. It consists

[1] Text based on the manuscript on Tunisia by Samia Maamer and Sameh Amara, 2014, in Pugliese et al. 2014

now of more than sixty different products, including other fresh fruits and vegetables (citrus fruits, tomato, pepper, artichoke, melon, garlic), vegetable and fruit sauces, pastes, spreads and condiments, and various tisanes (Figure 90).

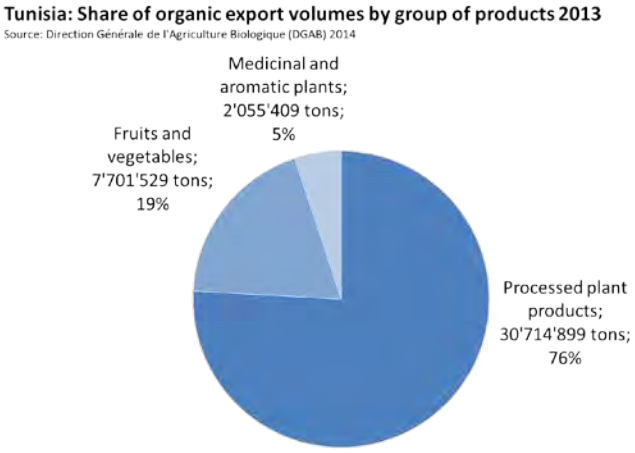

Figure 90: Tunisia: Share of organic export volumes by group of products 2013
Source: Direction Générale de l'Agriculture Biologique (DGAB) 2014

Europe is the biggest export market (84 percent of the total value in 2012). France, Italy, and Spain are the top importers of organic olive oil; Germany, France, the Netherlands, and Switzerland are the most important destinations for dates; and France imports the largest share of medicinal and aromatic plants. Tunisian organic products are also sold on the US market (15 percent of the total value; mainly olive oil and dates) and in much smaller shares in Canada and Australia as well (Figure 91).

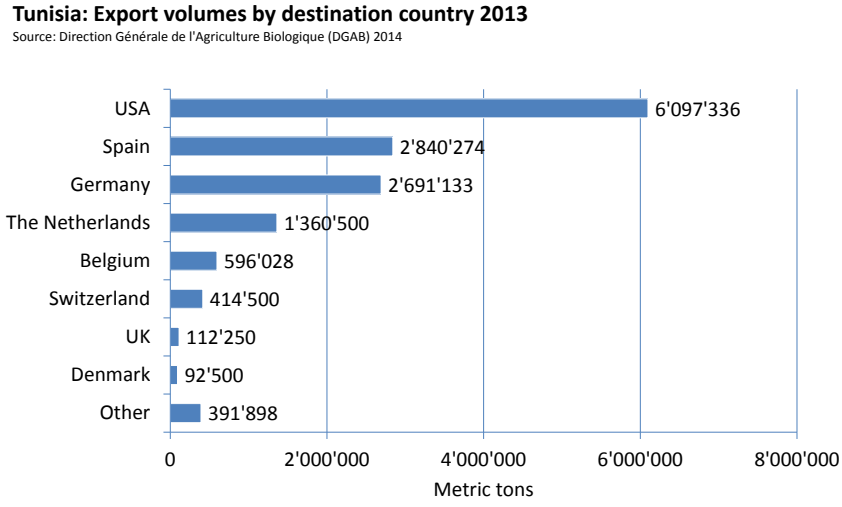

Figure 91: Tunisia: Export volumes by destination country 2013
Source: Direction Générale de l'Agriculture Biologique (DGAB) 2014

The negative trend, which remarkably affected organic areas and organic production in 2011-2012, did not really touch Tunisian organic export performances, which have, instead, continued to grow in volumes in the last three years, with an achievement rate against the national strategy forecasts that has never been reported below 85 percent. In the same period, except for a small drop in 2012, export values even increased beyond expectations.

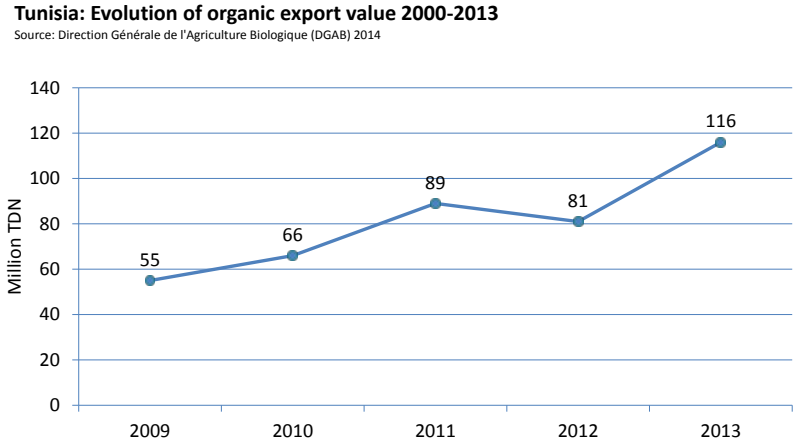

Figure 92: Tunisia: Evolution of organic export value 2000-2013
Source: Direction Générale de l'Agriculture Biologique (DGAB) 2014.

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Reference

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Latin America and the Caribbean

Map 6: Organic agricultural land in the countries of Latin America and the Caribbean 2013
Source: FiBL-IFOAM survey 2015; based on information from the private sector, certifiers, governments. For detailed data sources see annex, page 281

Organic Agriculture in Latin America and the Caribbean

Patricia Flores[1]

Introduction

In the past ten years, Latin America and the Caribbean have seen positive trends in economic growth, job creation, as well as a reduction of extreme poverty. In general terms, the Latin American and Caribbean region has proved more resilient to the difficult international context. Still, there are many unsolved key issues such as persistent poverty and hunger in the rural population, mostly smallholders.

The region faces new challenges on top of the old ones. These challenges include demographic transition, epidemiological transition, threats to natural and environmental resources, growing socio-environmental conflicts, and climate change; these challenges call for changes in production and consumption patterns that will lead to growing costs for the region. Agroecology and organic production have the means to address many of these challenges at a lower cost by increasing yields at the level of smallholder farms and providing a more sustainable and healthier diet while dealing with the negative effects of climate change through more resilient agricultural and food systems.

The December 2014 Climate Change Conference that took place in Lima, Peru, addressed the need to focus on adaptation and mitigation measures, especially in vulnerable countries in Latin America and the Caribbean, considering the amount of loss and damage in certain areas of the region. For example, climate variability has had a serious impact on crops in the region, such as cereals, oilseeds, coffee, banana, citrus, and sugarcane. Rust in coffee has severe consequences; they are not only economic, but also social, as coffee is grown mainly by smallholders. As long as the agricultural sector is not properly included in the official discussions and negotiations, the impact on the food system and the regional economy will be a major challenge. The Landscape approach, discussed and developed at the Global Landscape Forum (GLF) in Lima in December 2014, is a first step towards the integration of strategies in a territory (forests, agricultural systems, water, etc.), and hopefully, the contribution of the International Federation of Organic Agriculture Movements (IFOAM) can be included in the Paris Climate Change Conference in 2015. Unilever Chief Executive P. Polman said at the GLF: "*Industrial agriculture had driven 71% of deforestation between 2000 and 2012. Deforestation could be halted by a combination of two approaches: improving the yields and incomes of smallholder farmers and restoring degraded land. We have to produce more food. And we have to protect forests and support the communities that depend on them. We can't succeed in one challenge without succeeding in the other.*" In Latin America, more than 70 percent of the food comes from smallholders. Increasing yields in smallholder systems is only viable with an agroecological approach.

The organic sector and the legal framework scenario have kept stable during the past three years. Minor improvements in or completion of regulations in certain countries has been made. Some governments, such as those of Mexico, Chile, Argentina, and

1 Patricia Flores, IFOAM Representative for Latin American and the Caribbean, Lima, Peru, www.ifoam.org

Brazil, have provided significant support to the organic sector. This is reflected in the allocation of resources and capacity-building programs. In Peru, a major project with the European Union—the Euro EcoTrade project—is led by the Ministry of Environment (MINAM) together with the Ministry of Economy (MEF) and the Ministry of Foreign Trade and Tourism (MINCETUR). With few exceptions, in most countries in the region, organic agriculture is not mainstreamed in agricultural policy and is still regarded only as an international trade opportunity. In most countries, a national commission or a council of organic agriculture has been created to act as a cooperation platform between the public and the private sectors. This has proven to be an effective tool in fostering organic agriculture and the development of domestic markets in the region.

Since 2011, the United States has maintained a database that allows tracking imports of selected organic commodities. The statistics emphasize the importance of Latin American and Caribbean countries as suppliers for the United States organic food market, especially of products like coffee, seasonal fruits, and vegetables. Current research suggests that local, national, and regional partnerships between public and private institutions, which seek to strengthen the legislative framework of organic agriculture and capacity building in exporting countries, increase foreign producers' possibilities of selling to this expanding agricultural niche market (Scherer, 2013). As there are no agreements, such as equivalence or any other tools, to facilitate organic trade, organic producers in the region, besides complying with US National Organic Program (NOP), also have to fulfill the general and commodity-specific requirements for imports. This includes obtaining phytosanitary certificates, meeting pesticide restrictions, following grading standards for fresh produce, and meeting inspection standards for meat, poultry, and processed egg products. With all of these requirements, coupled with weak support in their countries, organic producers fail in their attempts to export as illustrated by the 200 tons of organic quinoa shipments from Peru. According to Scherer (2013), Peru, Mexico, Colombia, and Brazil are the top four countries supplying organic products to the United States. Peru and Mexico alone accounted for half of the overall HTS (Harmonized Tariff Schedule[1]) organic export value from the Latin American and Caribbean regions in 2012. Peru mainly accounts for coffee, while Mexico maintains a diverse export product basket (coffee, avocados, rice, blueberries, honey, and pepper). Chile and Argentina supply apples and other fruits.

Domestic markets are trending positively in the region. Today, the public is more environmentally aware and has greater purchasing power than in the past, and there are more producers supplying organic food in alternative commercial schemes, such as fairs, home deliveries, and small food stores. For some organic producers in the region, the domestic market is more attractive than the international market because of requirements and compliances that have to be met. Domestic markets with Participatory Guarantee Systems (PGS) and third party certification are gaining more recognition among consumers who want to support locally produced food, invest in healthy products, and support local family farms and processors.

In 2014, the International Year of Family Farming, several governmental efforts and policies were carried out. As a tool for creating food security and alleviating poverty, family farming is now on the national agenda of many countries in the region. For

[1] For more information about the Harmonized Tariff Schedule (HTS), see hts.usitc.gov.

example: Costa Rica launched a national plan for Family Farming; Chile increased its budget for the strengthening of family farming by 8.2 percent; Mexico launched "National Crusade against Hunger" as a social inclusion initiative and Mercosur[1] strengthened the Fund for Family Agriculture Support through the Food and Agriculture Organisation of the United Nations.[2]

Mexico

Mexico is one of the organic giants in the region. Its comprehensive, organic legal framework built in a participatory process and the government's support to strengthen the organic sector in several states of Mexico are successful stories of public-private cooperation. Recently, in October 2014, the Mexican Society of Organic Production, SOMEXPRO, and the International Federation of Organic Agriculture Movements (IFOAM) announced their joint efforts to further develop the Mexican organic sector, and they have signed an agreement, which includes several actions. The first one is related to the assessment of the organic regulation of Mexico against the COROS and to become a member of the IFOAM Family of Standards. SOMEXPRO and the competent authority for organic agriculture are working together on the specific regulation for Participatory Certification or PGS, organized in 15 states by the network of organic markets, REDAC (Red de Tianguis y Mercados Orgánicos de México), which is active in 15 states.

In June 2014, the first Organic Leadership Course[3] was completed, and the first class in the region graduated. The course was a joint effort between the Secretary of Agriculture of the State of Oaxaca, SOMEXPRO, and IFOAM.

In 2014, the One World Award – Silver, [4] was given to Rita Schwentesius, an agricultural scientist and professor at the University in Chapingo/Mexico. After teaching for eight years at Humboldt University in Berlin, she committed herself to the development of organic agriculture in Mexico. For more than 10 years, Rita Schwentesius coordinated the Mexican "Tianguis" network with more than 1'000 organic farmers. Rita Schwentesius co-founded the Center for Interdisciplinary Research and Rural Development (CIIDRI), which employs a staff of 60 scientists. Most of the statistics from Mexico for "The World of Organic Agriculture" come from this group of scientists and researchers. The Center's mission is to generate knowledge and practical methods that can be used to intensify organic cultivation. Presently, the CIIDRI team is working on a project with indigenous organic farmers in the mountains of the state of Oaxaca. Approximately 120 farmers with 900 hectares are organized in an organic and Fair Trade

[1] Mercosur is the Southern Common Market - El Mercado Común del Sur. For more information, see www.mercosur.int.

[2] More information "MERCOSUR y FAO fortalecerán el Fondo de la Agricultura Familiar, FAF" can be found on the FAO website at http://www.rlc.fao.org/es/prensa/noticias/mercosur-y-fao-fortalecen-el-fondo-de-la-agricultura-familiar-faf/

[3] More information about the Organic Leadership courses of IFOAM can be found here: http://www.ifoam.org/pt/academy/organic-leadership-courses.

[4] Every two years the One World Award honours extraordinary people for their commitment and actions. The international laureates are activists or pioneers in areas of economy, ecology or social matters. More information about the 2014 laureates of the One World Award is available here http://www.one-world-award.com/finalists-2014.html

cooperative "Cafe del Milenio." The focus of the project is on medicinal plants and developing homeopathic remedies and mixtures of effective microorganisms while improving their diets with organic vegetable gardens.

Central America and the Caribbean

Central American countries are mainly focused on commodities in organic production such as coffee and bananas. This is limiting the diversification of organic production and, therefore, the domestic markets as well. Costa Rica is managing to expand locally due to its long history of being the leading export country in the 1980s and 1990s, up until 2005. This is not the same case for the rest of the Central American countries. They are still struggling with volatile prices of commodities and diseases such as rust, monilia, and sigatoka. The resilience of the agricultural systems is a key factor to succeed in the international market of commodities, but to increase resilience is turning out to be a major challenge including organic systems. Only the best in class will succeed, given the conditions and impact of climate change.

Costa Rica is an important organic exporting country with Third Country status with the European Union. Although it is one of the most important countries in organic production, historically speaking, their organic land and exports have decreased. The main export products are coffee, bananas, pineapples, and sugarcane. On the other hand, many organic vegetable producers oriented to the domestic markets have diversified and increased significantly in the last years. Being one of the first countries in the region to establish farmers' fairs, Costa Rica, today, has a wide range of possibilities, where a local consumer can get organic fresh products produced by family farmers.

In Guatemala, the National Council of Organic Production (CNAE) has fostered organic production. It has launched Organic Day, which takes place every third Sunday as a joint effort of CNAE, the Municipality of Guatemala City, the Association of Agricultural Exporters (AGEXPORT), the competent authority MAGA, and Helvetas Guatemala. The webpage of CNAE has comprehensive information on organic regulations and other initiatives: http://temp.cnaeguatemala.org/

South America

› Peru

The 24 departments in Peru have a total organic production area of 230'936 hectares fully converted including wild collection areas, with a total of 496 operators grouping more than 52'000 producers. The department of San Martín has the highest number of producers, 8'614. The departments with the largest organic cultivated area are Junín and San Martín, with 38'543 hectares and 28'545 hectares respectively. Wild collection takes place in the department of Madre de Dios (60'535 hectares).

The Euro-Eco-Trade project in Peru is a support program costing 13 million euros, to be implemented in three years. The program aims to support the Peruvian strategy of fostering international trade in organic products under the framework of the Free Trade Agreement with the European Union. Some organic products included in the program are mango and banana (Department of Piura), quinoa and amaranth (Departments of Cuzco, Puno, and Arequipa), and Brazil nuts (Department of Madre de Dios). The

program has already started to organize training activities for organic operators, as well as studies of the organic value chains of the above-mentioned products.

› Bolivia

The organic sector operates through the National Council of Ecological Production (CNAPE in Spanish). According to CNAPE, the main organic export products are cocoa, coffee, Brazil nuts, and quinoa. Quinoa constitutes 80 percent of the export volume. The Ministry of Rural Development is in charge of the development of organic production for exports and the domestic market. Domestic markets are supplied by 6'500 producers in seven departments, producing Andean cereals, vegetables, and honey among other products. In order to foster market-oriented organic products, the Bolivian government started an international cooperation with the Government of Spain as the main partner. The project ended in 2013 (total project value: eight million US dollars, approx. 6.5 million euros). Since 2014, the government is allocating financial resources of its own (around 4 million of bolivianos, approximately half a million euros).

› Ecuador

In Ecuador, the number of organic farmers is increasing to supply both international and domestic organic markets. The Constitution of Ecuador claims agroecological production to achieve a "good living" ("Sumak Kausay" in Quechua, a native language) and food sovereignty. Organic producers on the seacoast are mainly producing bananas, coffee, cacao, and shrimps for international markets in the United States and European Union. In the Ecuadorian highlands, organic producers are producing vegetables, medicinal plants, sugarcane (for panela), and quinoa; most of them are organized in associations of smallholders. There is an increasing number of private initiative and companies, supplying international markets.

› Colombia

In Columbia, the figures on organic production for export do not show a positive trend. However, Colombia has seen an expansion of its agroecological markets, which link local consumers with family farmers. The agroecological market "Tierra Viva" in Bogota is a good example of how civil society and farmer organizations have joined together to develop a local market for Columbia's most important city. Another experience with Participatory Guarantee Systems is the network of agroecological farmer's markets (Red de Mercados Agroecologicos Campesinos) in the Cauca Valley: In twelve municipalities, 330 families are linked to more than sixty farmers' organizations.

South Cone sub-region

› Brazil

Brazil is the most important organic market in the region in terms of both production and consumption. The Brazilian regulation concerning organic production is based on two main concepts: trust among producers and consumers, and quality control. The SisOrg seal (organic official seal) is given if producers comply with third party certification or a participatory guarantee system. Family farmers can sell their organic products through direct sales without any certification, as long as they belong to a social

control organization registered with the competent authority. The Agroecology Coordination (Coagre), the Secretary of Agricultural and Cooperative Development (SDC), and the Ministry of Agriculture are responsible for the development of organic agriculture in Brazil. They encourage, promote, and develop the organic regulation and implementation of the control mechanisms.

In October 2013, Brazil announced the launch of a huge National Plan for Organic Production and Agroecology called "Brasil Agroecológico."[1] Most of these resources are available through the National Program for the Strengthening of Family Agriculture (Pronaf) and the Agricultural and Animal Husbandry Plan. The remaining resources will be allocated to specific programs such as training, the promotion of technical assistance and rural extension, development of technological innovations, as well as better access to public procurement through the Food Procurement Program (Programa de Adquisición de Alimentos (PAA) and the National Program for School Meals (Alimentación Nacional Escolar PNAE).

The objective of the Brazilian government is to foster organic production with family farmers, to improve their income, and to increase organic food supply in Brazilian homes. Also, the Ecoforte Program aims to strengthen "Brasil Agroecológico" by giving support to production and processing done by cooperatives, networks, and farmers' groups to increase access to conventional market channels. Ecoforte will cost an additional 175 million Brazil reais (more than 50 million euros). Of that amount, 100 million Brazil reais (more than 30 million euros) comes from the Economic and Social Development National Bank (BNDES), 50 million from other partners, and 25 million is made available as part of an agreement between BNDES and the National Food Supply Company (Conab). The Bank of Brazil will also provide 150 million Brazil reais in credits and will facilitate the process for selected cooperatives.

At least 200'000 families will benefit from the Plano Nacional de Agroecologia e Produção Orgânica (Planapo), Brasil Agroecológico. It is expected that, at the end of 2015, 50'000 operators will receive organic certification. Nowadays, there are more than 10'000 operators, half of them certified by third parties, 25 percent by social control organizations, and 25 percent by PGS.

› Argentina

According to the annual report of SENASA, the Argentinean competent authority, the country's main destination market continues to be the US; exports to the US increased by 22 percent in 2013. The area dedicated to production for export increased by 10 percent and is now at 65'555 hectares. Fruits, mainly pears, are the most important export products. The area for sugarcane, vines, and olives increased by 20 percent

Domestic markets in Argentina are strengthening, and local fairs, such as those organized in Buenos Aires in 2014, are becoming important focal points for local consumers to buy organic food and raise awareness of the importance of organic agriculture.

The Argentinian scientist, Professor Andrés Carrasco, passed away in May 2014, which was sad news for the organic movement. Carrasco, a brilliant and brave scientist, was the

[1] For more information see website of the Ministry of Agriculture at www.mda.gov.br/planapo/

director of the Laboratory of Molecular Embryology, at the University of Buenos Aires Medical School, and the lead researcher at the National Council of Scientific and Technical Research (CONICET), Argentina. Research published in August 2010 by Professor Carrasco found that glyphosate causes malformations in frog and chicken embryos at doses far lower than those used in agricultural spraying.

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Latin America and the Caribbean: Current statistics

JULIA LERNOUD[1], HELGA WILLER[2] AND BERNHARD SCHLATTER[3]

Organic agricultural land

In 2013, 6.6 million hectares were reported as being under organic production, which is 1.1 percent of the total agricultural land in Latin America and the Caribbean. Fifteen percent of the world's organic agricultural land is in Latin America and the Caribbean. More than 200'000 hectares less were reported than in 2012. This can be partly attributed to a major decrease, of mainly grassland/grazing areas, in Argentina (almost 450'000 hectares less). However, in some countries, there was a big increase of organic agricultural land in 2013, like in Peru, where the area increased by more than 190'000 hectares, and the area is now almost double of what was reported in 2012. The organic area has increased by almost 70 percent since 2000 (3.9 million hectares). The country with the largest organic agricultural area was Argentina with 3.2 million hectares (Figure 93), and the country with the largest number of producers is Mexico with more than 169'000 (Table 59). The highest proportion of the total agricultural area was reached in the Falkland Islands (more than 36 percent), which is the country with the highest share of organic land worldwide.

Land use

Land use details were available for more than 80 percent of the agricultural land. In 2013, only three percent of all organic farmland was used for arable crops (209'335 hectares), while almost 70 percent was grassland/grazing areas (4.3 million hectares), and 13 percent (845'020 hectares) was used to grow permanent crops (see Figure 96). Argentina (almost 3 million hectares), Uruguay (926'000 hectares, data from 2006) and the Falkland Islands/Malvinas (400'000 hectares) had the largest permanent *grassland/grazing areas*. The key *arable crops* are vegetables, representing almost 30 percent of the Latin America and Caribbean organic arable area, and amounting to more than 60'000 hectares. Most of the vegetables were grown in Mexico (46'573 hectares), Colombia (11'225 hectares) and Peru (1'000). Organic sugarcane was grown on 35'000 hectares in 2013 with the key producing countries being Argentina (12'000 hectares) and Paraguay (11'500 hectares). The main *permanent crops* were coffee (445'000 hectares), cocoa (almost 205'000 hectares), and tropical and subtropical fruits (almost 118'000 hectares).

Wild collection

Wild collection plays an important role in Latin America and the Caribbean. More than 2 million hectares are certified organic and are mainly used for the collection of wild nuts (846'000 hectares), wild rose hips (42'000 hectares), and wild fruits (24'000 hectares). Information on wild collection is not available for many countries, so it can be assumed that the total wild collection organic area is higher than that presented in this report.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Latin America and Caribbean: Graphs

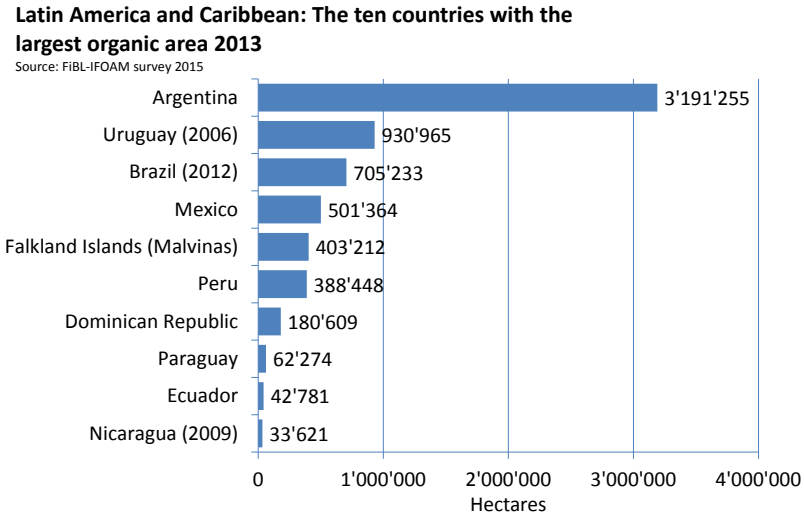

Figure 93: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2013

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

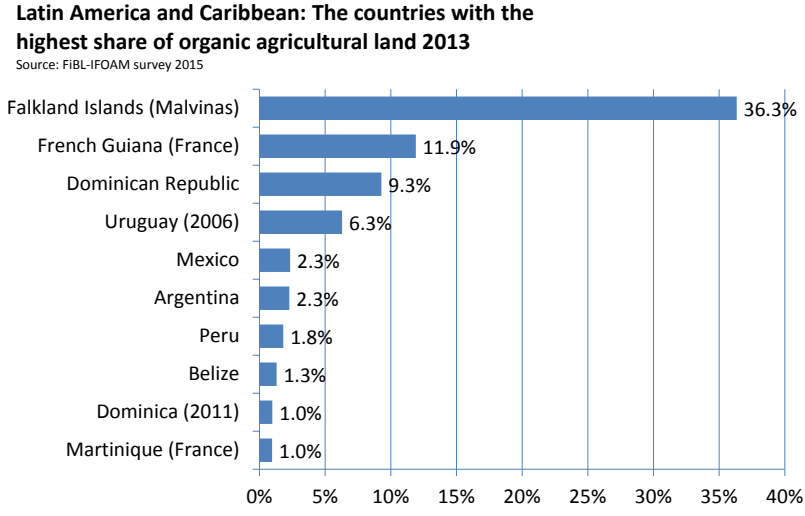

Figure 94: Latin America and Caribbean: The ten countries with the highest shares of organic agricultural land 2013

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

Latin America and Caribbean: Development of organic agricultural land 2000 to 2013

Source: FiBL-IFOAM-SOEL 2002-2015

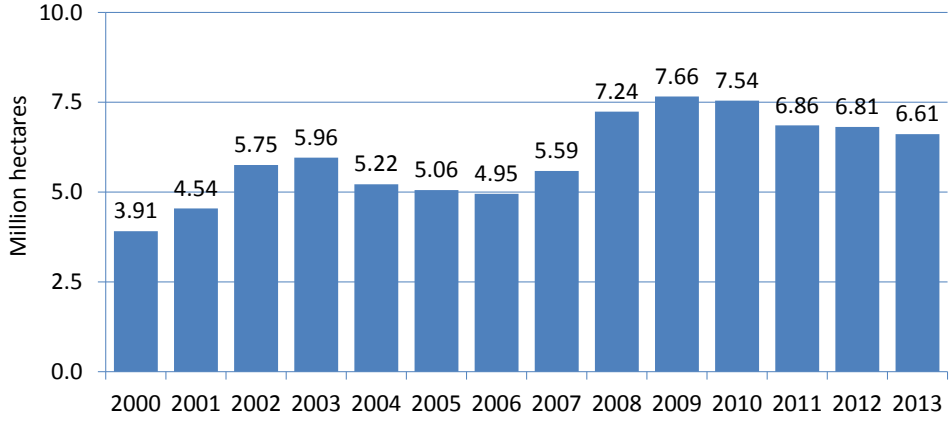

Figure 95: Latin America and Caribbean: Development of organic agricultural land 2000-2013

Source: FiBL-IFOAM-SOEL surveys 2000-2015

Latin America and Caribbean: Use of agricultural organic land 2013

Source: FiBL-IFOAM Survey 2015; based on information from the private sector, certifiers, and governments.

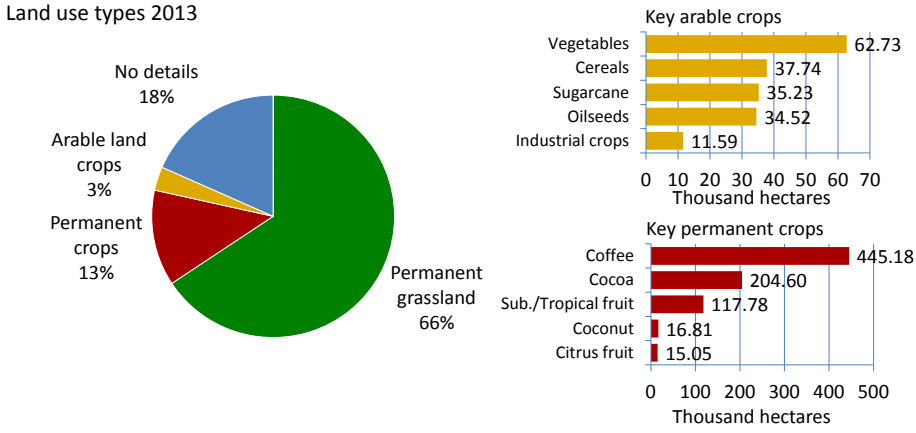

Figure 96: Latin America and Caribbean: Land use in organic agriculture 2013

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

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Organic Agriculture in Latin America and Caribbean: Tables

Table 59: Latin America: Organic agricultural land, share of total agricultural land and number of producers 2013

Country	Area [ha]	Share of total agr. land [%]	Producers
Argentina	3'191'255	2.3%	1'018
Bahamas	49	0.5%	
Belize	1'982	1.3%	900
Bolivia	32'710	0.1%	9'837
Brazil	705'233	0.3%	12'526
Chile	23'469	0.1%	446
Colombia	31'621	0.1%	4'775
Costa Rica	7'449	0.4%	3'000
Cuba	7'389	0.1%	2
Dominica	240	1.0%	
Dominican Republic	180'609	9.3%	24'412
Ecuador	42'781	0.6%	9'245
El Salvador	6'736	0.4%	2'000
Falkland Islands (Malvinas)	403'212	36.3%	8
French Guiana (France)	2'702	11.9%	43
Grenada	85	0.7%	3
Guadeloupe (France)	193	0.5%	34
Guatemala	13'380	0.3%	3'008
Guyana		Wild collection only	
Haiti	2'878	0.2%	1'210
Honduras	24'950	0.8%	4'989
Jamaica	542	0.1%	80
Martinique (France)	269	1.0%	39
Mexico	501'364	2.3%	169'703
Nicaragua	33'621	0.7%	10'060
Panama	15'183	0.7%	1'300
Paraguay	62'274	0.3%	7'905
Peru	388'448	1.8%	52'284
Uruguay	930'965	6.3%	630
Venezuela (Bolivarian Republic of)	47	0.0%	
Total	6'611'636	1.1%	319'459

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

Table 60: Latin America: All organic areas 2013

Country	Agriculture [ha]	Aqua-culture [ha]	Other non agr. land [ha]	Wild collection [ha]	Total [ha]
Argentina	3'191'255		26'118	458'601	3'675'974
Bahamas	49				49
Belize	1'982				1'982
Bolivia	32'710			785'453	818'163
Brazil	705'233			1'209'773	1'915'006
Chile	23'469		8'146	61'751	93'366
Colombia	31'621			7'320	38'941
Costa Rica	7'449				7'449
Cuba	7'389				7'389
Dominica	240				240
Dominican Republic	180'609			5'260	185'869
Ecuador	42'781	3'123		1'260	47'164
El Salvador	6'736				6'736
Falkland Islands (Malvinas)	403'212				403'212
French Guiana (France)	2'702				2'702
Grenada	85				85
Guadeloupe (France)	193				193
Guatemala	13'380			5	13'385
Guyana				58'000	58'000
Haiti	2'878				2'878
Honduras	24'950				24'950
Jamaica	542			0	542
Martinique (France)	269				269
Mexico	501'364			30'364	531'727
Nicaragua	33'621			11'463	45'084
Panama	15'183				15'183
Paraguay	62'274				62'274
Peru	388'448	4		120'467	508'919
Uruguay	930'965				930'965
Venezuela	47				47
Total	6'611'636	3'127	34'264	2'749'717	9'398'744

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

Table 61: Latin America: Land use in organic agriculture 2013

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		721'672
Arable crops	Arable crops, no details	16'303
	Cereals	37'738
	Flowers and ornamental plants	4
	Industrial crops	11'586
	Medicinal and aromatic plants	6'737
	Mushrooms and truffles	0
	Oilseeds	34'523
	Protein crops	611
	Root crops	920
	Seeds and seedlings	65
	Strawberries	273
	Sugarcane	35'231
	Textile crops	1'701
	Tobacco	434
	Vegetables	62'732
	Arable crops, other	477
Arable crops total		*209'335*
Cropland, no details		484'955
Other agricultural land	Fallow land, crop rotation	1'954
	Other agricultural land, no details	5'598
Other agricultural land total		*7'552*
Permanent crops	Berries	5'388
	Citrus fruit	15'048
	Cocoa	204'601
	Coconut	16'809
	Coffee	445'178
	Flowers and ornamental plants, permanent	2
	Fruit	1'001
	Fruit, temperate	5'617
	Fruit, tropical and subtropical	117'782
	Grapes	12'064
	Medicinal and aromatic plants, permanent	462
	Nurseries	32
	Nuts	1'207
	Olives	4'985
	Tea/mate, etc.	7'204
	Permanent crops, other	7'640
Permanent crops total		*845'020*
Permanent grassland		4'343'102
Total		**6'611'636**

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

Table 62: Latin America: Use of wild collection areas 2013

Land use	Area [ha]
Berries, wild	634
Fruit, wild	24'466
Medicinal and aromatic plants, wild	60
Mushrooms, wild	1'260
Nuts, wild	845'989
Palmito, wild	6'800
Rose hips, wild	42'272
Wild collection, no details	1'341'174
Wild collection, other	13'650
Total	**2'276'304**

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

North America

Map 7: Organic agricultural land in Canada and the US 2013

Source: Canada Organic Trade Association (COTA) and United States Department of Agriculture (USDA, data 2011). For detailed data sources see annex, page 281.

2014 Farm Bill was a Major Milestone for the U.S. Organic Sector

Barbara Fitch Haumann[1]

It took more than two full years of active work by U.S. legislators to draft and finalize what became the Agricultural Act of 2014 (known as the 2014 Farm Bill), and an even longer period of knocking on doors by the organic sector to explain the needs for continuing the nurturing the health of U.S. organic agriculture. But it all paid off!

A growing and vital segment of the U.S. farm economy, organic agriculture historically has been under-represented in U.S. Farm Bill programs compared to conventional agriculture. This changed with the final 2014 Farm Bill, which incorporated provisions for all of the policy "Asks" from the organic sector. These included:

- Increased funding for the National Organic Program;
- Commitment to develop organic price elections for crop insurance;
- Restored funding for certification cost-share, in which certified organic farmers and handlers can receive reimbursement for some of the costs of certification;
- Expanded exemptions for organic operations from conventional check-off programs[2];
- A provision allowing the organic sector to pursue a possible organic research and promotion program (organic check-off) funded by industry participants;
- Funding for the U.S. Department of Agriculture's (USDA's) Market Access Program, which helps U.S. organic operations engage in markets around the world.

However, with the mid-term election in November 2014, the political landscape in the United States has shifted once again, making prospects for organic agriculture in the coming years less certain. The results: many new faces in Congress with the beginning of 2015, as the Republicans not only strengthened their control in the House of Representatives, but won control of the U.S. Senate.

Now, it is crucial that the U.S. organic sector continue to build its relationships within Congress to protect the gains won in the Farm Bill throughout its implementation. Only in continuing to foster relationships with those in Congress who have proven to support provisions for organic and cultivating relationships with new leaders can the sector protect and grow organic's profile in D.C.

[1] Barbara Fitch Haumann is the Senior Writer/Editor for the Organic Trade Association, 28 Vernon St, Suite 413, Brattleboro VT 05301 United States, www.ota.com

[2] Check-off program: Usually, a reference to the generic research and commodity promotion programs for farm products that are financed by assessments applied to sales of those products by producers, importers, or others in the industry. Quoted in: Womach, Jasper (2005) Agriculture: A Glossary of Terms, Programs, and Laws, 2005 Edition = CRS Report for Congress, Washington. Available at http://www.cnie.org/NLE/CRSreports/05jun/97-905.pdf

Organic data

According to the latest data available, there are at least 18'513 certified organic operations and 3'240 farms transitioning to organic across all 50 U.S. states.[1] Meanwhile, U.S. consumer sales of organic products topped 35 billion US dollars in 2013 (up 11.5 percent overall from 2012), and were forecast to have grown more than 11 percent overall in 2014, with predictions for continued growth over 11 percent during 2015.

According to the Organic Trade Association's (OTA's) "U.S. Families' Organic Attitudes & Beliefs 2014 Tracing Study," more than 80 percent of families in the U.S. now buy organic products at least occasionally.

With farm gate revenues of 3.5 billion US dollars, organic products rank among the top four food and feed categories by dollar value, behind only corn, soybeans. A major challenge had been to educate members of Congress about organic agriculture and its role in U.S. agricultural health.

According to the 2012 Census of Agriculture Organic Special Tabulation released in September 2014 by USDA's National Agricultural Statistics Service (NASS), U.S. organic producers were more likely to be beginning farmers, with 27 percent starting farming in the past ten years, compared to 18 percent of all principal farm operators.

In addition, organic operators were younger, with 26 percent under 45 years old compared with 16 percent of all principal operators.

Moreover, organic producers were much more likely to report direct-to-consumer sales than conventional producers. While only 7 percent of all U.S. farms sold agricultural products directly to consumers, 42 percent of organic farms reported such sales. In addition, organic operations were more likely to sell crops such as fruits and vegetables than livestock and poultry products. Almost 90 percent sold crops, while slightly fewer than 50 percent sold livestock or poultry products.

NASS is scheduled to survey all known organic farmers early in 2015 to gather the latest data on U.S. organic agriculture.

International trade

On July 1, 2014, the United States and the Republic of Korea welcomed a new equivalency arrangement that reopened a critically important Asian market for U.S. organic processed food products and was seen as an opportunity for job creation and opportunities for the American organic food and farming sector.

This was expected to more than double American exports of organic processed foods and beverages to Korea—from around 35 million US dollars in 2013—in the next five years.

[1] Please note that these figures are different from those that are communicated in the tables of this book. The numbers mentioned in the text above are the official numbers released by the U.S. Department of Agriculture's National Organic Program (NOP) in March 2014 based on data collected on the number of operations certified to USDA organic regulations in 2013. The 18'513 certified organic operations included organic farms and processing facilities.

USDA's NOP at that time had showed over 25'000 certified organic operations (meeting USDA organic regulations) in 2013 in more than 120 countries around the world.

This is the second organic equivalency partnership formed with a major Asian trading partner within a year. In September 2013, the United States and Japan agreed to a similar understanding regarding the bilateral trade of organic products. These build on the landmark equivalency arrangements reached with Canada in 2009 and the European Union in 2012.

The U.S.-Korea equivalency arrangement was formalized on June 30 in separate signings in Seoul and Washington. Under the pact, Korea recognizes USDA's National Organic Program as equivalent to Korea's organic oversight program The understanding, which covers organic condiments, cereal, baby food, frozen meals, milk, alcoholic beverages and other processed products, allows processed organic products certified in Korea or in the United States to be sold as organic in either country.

With a grant for 784'902 US dollars from USDA's Market Access Program (MAP) to promote U.S. organic products abroad in 2015, the Organic Trade Association (OTA) is gearing up a far-reaching strategy for 2015 that will include more organic promotional and education programs in Japan and around the globe.

According to preliminary findings (the final report is not yet published) from an analysis conducted for OTA by Dr. Ted Jaenicke, agricultural economist at Penn State University, U.S. organic product exports reached a new high of 537 million US dollars in 2013, up more than 20 percent from the previous year, with export sales at nearly 400 million US dollars for the first three quarters of 2014. Based on dollar value, apples, lettuce and grapes were the top three U.S. organic exports.

Meanwhile, organic product imports tracked in 2013 added up to nearly 1.3 billion US dollars and nearly 1 billion US dollars for the first three quarters of 2014. Coffee, wine, soybeans and olive oil were the top organic imports.

Actual organic exports are undoubtedly much higher than these numbers. This is because these findings are based on USDA's Global Agricultural Trade System (GATS), which only began gathering trade for organic products in 2011. In that year, GATS included export data for only 23 organic products and import data for 20 organic products. Since then, USDA has added additional product categories. Taken into account in the analysis were a total of 26 exported products and 35 imports.

Until the United States started using HS (harmonized system) codes to track a limited number of organic commodities, there was no way of measuring the organic products coming in and going out of the country, or the success and growth of global organic industry over time. While there are thousands of HS codes in place today, there are only handfuls for organic-specific products.

Formal submission requests for new codes are accepted a few times a year through the Office of Tariff Affairs and Trade Agreements of the U.S. International Trade Commission. There are some key requirements for a code to even be considered. First, the product needs to generate at least 1 million US dollars in trade annually. Next, this trade floor minimum must be generated by at least three exporting entities to protect company-specific trade information.

OTA's most recent submission requesting additional organic HS codes resulted in the creation of 11 new codes for organic products. These codes went into effect January 1, 2015. Previously the HS export codes were mostly in the fresh produce category. The 11

latest codes cover organic salad mixes in both large and small packages, carrots reduced in size and baby carrots, beets, peas, asparagus, limes, watermelons, peaches and berries.

The next round of submissions is due April 1, 2015. As the Organic Trade Association (OTA) continues to promote equivalency arrangements with major trading partners, and the organic industry as a whole continues to grow, OTA aims to have the government increase the number of export codes tracked to expand the data available to more accurately measure the impact of global organic trade.

A recent OTA survey of the U.S. organic industry shows a growing number of organic stakeholders involved in the export market—just over 60 percent of respondents surveyed said they export all or some of their organic products, with an additional 20 percent reporting that they plan to get into the international arena. Many of today's organic exporters are new to the export business, with some 50 percent selling their products on the global stage for five years or less, and almost 20 percent just two years or less.

The inability to locate appropriate buyers is frequently cited as one of the biggest barriers to exports. Since the mid-1990s, OTA has been working to help promote organic agricultural products in international markets and to connect buyers and sellers. The first year OTA participated in USDA's Market Access Program was 1999. OTA's membership now represents about 85 percent of U.S. organic exports, and the market promotion activities administered by OTA are open to the entire organic industry, not just OTA members.

Challenges and opportunities

The U.S. organic sector faces of numerous challenges and opportunities. These have been clearly identified by OTA's Farmers Advisory Council—formed by OTA in 2013 to elevate the voices of U.S. organic farmers and to provide guidance on how farmers can constructively engage with national policymakers. Included are increasing demand and supply shortages of organic ingredients, especially grain; ways to encourage transition to organic production; analysis and feedback on critical regulatory issues such as the Food Safety Modernization Act (FSMA) and animal welfare; organic crop contamination from prohibited residues; access to land for beginning organic and transitioning farmers; and international trade barriers.

Among the opportunities on the horizon is a proposed organic check-off program that has been under discussion for the past several years. As noted at the beginning of this chapter, some actions outlined in the 2014 have helped move this proposal forward.

On December 16, 2014, USDA announced a proposed rule to exempt more organic farmers and handlers from paying into conventional commodity check-off programs. This is an important step that recognizes the organic industry's unique needs, and lets the industry decide where its dollars are best spent.

"The organic sector is a fast-growing, distinct industry with its own unique demands for research and promotion. We're pleased USDA is moving swiftly to allow the industry to use its money to grow and develop its own sector," said Laura Batcha, CEO and Executive Director of OTA.

National commodity research and promotion check-off programs, funded by producers of the specific commodity, have been a part of American agriculture for almost fifty years. There are now 22 national check-off programs in place, ranging from the oldest check-off program begun in 1966 for cotton, to one of the newest that promotes American-grown mangoes. The iconic "Got Milk" and "The Incredible Edible Egg" campaigns are examples of promotion and education programs paid for by successful producer-funded check-offs.

The proposed exemption, which was expanded by Congress in the Farm Bill of 2014, would extend the exemption for organic farmers, handlers, marketers, or importers from just the 100 percent organic label to the primary organic label (95 percent organic) and pertain not exclusively to farmers or handlers who work solely with organic products, but also to those who produce, process, handle and import both organic and conventional products.

The exemption from conventional commodity check-off program assessments is very significant for certified organic operations. USDA estimates that not having to contribute to conventional check-offs will free up an extra 13.6 million US dollars for organic stakeholders to invest back into the organic industry.

The USDA proposed rule will also exempt eligible operations from paying into the portion of the assessment in federal marketing order programs designated for market promotion activities. There are 23 marketing order programs with market promotion authority.

The 2014 Farm Bill also authorizes USDA to consider and hold a vote on an organic research and promotion check-off program if the organic sector submits to the agency an official proposal for an organic check-off. OTA has been gathering input from organic stakeholders for the past three years on how best to shape a check-off program that could effectively serve the industry.

"The successes in the organic industry have been enormous," said Batcha. "However, there is still much that needs to be done in the way of educating consumers about organic, devoting more research dollars to organic agriculture, and helping farmers to convert to organic. Giving the industry more ability to invest in its future is very significant."

Sources

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Overall source on information on U.S. organic farming and trade: www.ota.com.

Canada

MATTHEW HOLMES[1] AND MARIE-EVE LEVERT[2]

Organics in Canada continue to enjoy robust demand, with conservative estimates for 2013 putting the domestic consumer market for organic food and beverages at 3.25 billion Canadian dollars.[3] According to new reports by CIBC World Markets and Statistics Canada, the 2013 combined total sales of food and alcohol in Canada was 112.8 billion Canadian dollars. These figures suggest organic now represents 2.8 percent of all sales. In addition, exports continue to provide value to producers; they are valued at over 500 million Canadian dollars, and are greatly facilitated by Canada's five equivalency arrangements with major trading partners. At a production level, there are continued echoes of the decline in supply following the global recession, concentrated in the Prairie region. However, it appears the rate of decline for producers has not had the same impact on acreage and has largely stabilized. In the context of unmet demand throughout North America, as well as lower prices for conventional crops and new initiatives to encourage conversion, it is hoped that the coming years will see an increase in producer numbers that matches the significant rise in Canadian processors seen since 2011.

Organic production

Data collection system

Canada's organic sector continues to rely on the voluntary disclosure of data by certifiers, provincial organizations and some governments. In 2014, there was almost universal participation, resulting in the most rigorous data yet. However, the authors note that year-over-year change and inconsistencies remain a risk until a national mandatory data system has been implemented.

Producers

The number of primary agricultural producers in 2013 was 3'513, representing a slight decline (2.3 percent) compared to 2012. The decrease is largely due to the loss of more than 60 growers in Saskatchewan, continuing the trend of the past few years. In fact, Saskatchewan has seen its number drop by 24 percent over the past two years, though acreage numbers have not been affected by this decline. The number of operators remained relatively stable in the other provinces.

In addition to the traditional producers reported above, the Canada Organic Trade Association (COTA) has tracked the introduction of operators certified to the new Canadian organic aquaculture standards published in mid-2012. In 2013, COTA counted 16 certified organic aquaculture farms managing 42 sites, which are in addition to the national total. These produce a range of livestock (see next page) and seaweeds.

[1] Matthew Holmes, Canada Organic Trade Association (COTA), Ottawa, Canada, www.otacanada.ca

[2] Marie-Eve Levert, Canada Organic Trade Association (COTA), Ottawa, Canada, www.otacanada.ca

[3] In 2013, 1 Canadian dollar corresponded to 0.731 euros.

Organic agricultural land

There are at least 870'000 hectares of land in Canada that are used for organic crops and grazing lands, including 9'992 hectares in conversion for crop production. There are also another 67 hectares of forest and 71'820 hectares of wild collection that comprises 39'560 hectares of maple woods tapped for organic syrup production. Crown land leases used for grazing of organic livestock are included under fallow in the total for agricultural land.

Livestock production

Livestock data for 2013 was inconsistent and did not provide adequate information to compare to previous years; some data provided included all age classes, while other data included breeding animals only.

The 2012/13 dairy year saw 209 farmers produce more than 950'000 hectoliters of organic milk, which represents 1.20 percent of the total Canadian production. The production increased by 13'000 hectoliters over 2012. It is estimated that there are between 15'000 to 16'000 cows in the organic milking herd in Canada (Macey, 2013). Ontario (77) and Quebec (102) have the highest number of organic milk producers.

The publication of Canada's new organic aquaculture standards saw new aquatic livestock introduced to the market in 2013. The majority of these producers are organic mussel producers in the Atlantic region, along with caviar and finfish production in Ontario and British Columbia.

Processors and handlers

Canada counts 1'447 operators that are manufacturing, distributing or handling organic products, which is an increase of 14 percent compared to 2012. This increase prevails in each province, with the exception of Saskatchewan. British Columbia and Ontario gained respectively 57 and 65 new organic processors/handlers in 2013. This growth can be explained by the increased consumer demand for organic foods as well as diversification in the activities of the organic operators. An additional eight certified processors and feed mills are certified to Canada's new organic aquaculture standards.

Seed initiatives

The Bauta Family Initiative on Canadian Seed Security is a new project, delivered by USC Canada,[1] in partnership with Seeds of Diversity Canada and supported by The W. Garfield Weston Foundation. In 2014, the program counted over 60 applied research sites, 32 grants to scale up and diversify production, 17 community seed library grants, close to 30 seed training grants, three conferences, as well as seed internships, field days, and informal convening.

As part of the Bauta Initiative, COTA released the first comprehensive study on the organic seed market in Canada. The study measured the current and potential market for ecological and organic seed, provided crop- and region - specific information and set a benchmark for ongoing data collection in the sector. It concluded that the current

[1] USC Canada is a non-profit international development organization, establishing programs in food security/ biodiversity, desertification, climate change and poverty alleviation. More information can be found at usc-canada.org.

value of certified organic seed totaled 28.4 million Canadian dollars per year, with 9.1 million Canadian dollars in vegetable seed, and 19.3 million Canadian dollars in field crop seed (7.7 million Canadian dollars purchased and 11.6 million Canadian dollars in saved seed). The research also included the first ever survey of organic inspectors regarding their own experiences with organic seed and farmer requests for seed derogations.

The subject of seed also received a lot of attention at the federal policy level, as the government debated and advanced the "Agricultural Growth Act", which seeks to implement UPOV[1] '91 in Canada in 2015. As a result of coordinated response from the Canadian organic sector, a crucial amendment was introduced to ensure that farmers continue to have the right to store and propagate seed for their own use.

Japan equivalency, expansion of EU scope

After years of technical discussions, peer review and negotiations, Canada and Japan announced an equivalency arrangement for organic products in September 2014. This brings Canada's total equivalency arrangements to five, providing Canadian organic operators with privileged access to over 95 percent of the world's organic market.

The recognition agreement was formalized in letters traded between the Japan Ministry of Agriculture, Forestry and Fisheries and the Canadian Food Inspection Agency (CFIA). Plants and processed foods of plant origin are covered under the agreement and must bear the Japanese Agricultural Standards (JAS) seal to be sold in Japan; they may bear the Canada Organic logo. Canadian organic products that are not covered under the JAS regulations (e.g., meat, dairy, and honey) but are certified under Canada's regime will still have access to the Japanese market, but without the JAS logo. All JAS-eligible organic products may enter Canada and bear the Canada Organic logo under the arrangement.

There has also been renewed activity between officials in the European Commission and Canada to expand the scope of their 2011 equivalency. Currently, the arrangement limits Canadian exports to only products grown in or made from ingredients grown in Canada, while Canada accepts any food products from the EU. The EU has approached Canada with interest in including organic wine in the terms of the agreement, and so both countries held a number of talks to look at removing limits on country of origin and including wine in the terms of their organic trade.

Canada is also actively exploring equivalency arrangements with Mexico and South Korea, in an effort to strategically broaden into markets with strong demand and historic trade ties with Canada. COTA is providing government negotiators with expert technical assistance during these equivalency discussions.

Major standards revisions underway

Under the oversight of the Canadian General Standards Board, the Canadian organic standards, including materials lists, are undergoing a comprehensive five-year review

[1] UPOV is the International Union for the Protection of New Varieties of Plants (UPOV) is an intergovernmental organization with headquarters in Geneva (Switzerland). For more information see www.upov.int.

under the direction of a technical committee made up of industry experts, as well as environmental, consumer and government representatives. The series of meetings, held in 2014 and early 2015, will result in a fully revised organic standard and permitted substances list published in late 2015. The committee is also considering whether it will integrate the Canadian organic aquaculture standards into the greater organic standards and permitted substances list, to ensure continuity and streamlining. Upon publication, the new standards will immediately become mandatory under Canada's organic regulations, but will be phased in with each company or farm's annual inspection review.

Regulatory modernization

Like many other jurisdictions, Canada is in the midst of a major overhaul of its regulatory and food safety systems, as well as food labelling and nutrition information. The scope of the new regulations are broad and will affect nearly all food imported, sold, traded or exported from Canada; they will be introduced between 2015 and 2018.

The Canadian Food Inspection Agency (CFIA) consulted widely in 2014 on a new comprehensive food traceability and safety rule under the "Safe Food for Canadians Regulations". The new laws will consolidate and streamline a multitude of pre-existing food and agriculture regulations into one piece of legislation, including the previously distinct Organic Products Regulations. The rules governing organic certification and labelling will remain substantively the same. However, it is expected that the new regulations will broaden the scope of the Canada Organic Regime to include organic aquaculture, based on the new aquaculture standards. This will provide organic aquaculture products with access to the "Canada Organic" logo but may also limit the import of certain products not certified to Canada's requirements. At time of press, the draft regulations were expected to be published in *Canada Gazette*, Part I, in January 2015, with a public comment period of 75 days. The final version of the new regulations will be published later in 2015.

New investment for Organic Science Cluster II announced

In August 2014, the Government of Canada announced an investment of eight million Canadian dollars for the continuation of the Organic Science Cluster. The science cluster is an industry-supported research and development endeavor initiated by the Organic Agriculture Centre of Canada at Dalhousie University, in collaboration with the Organic Federation of Canada with the support of Agriculture and Agri-Food Canada's *Growing Forward 2* program.

The Organic Science Cluster II consists of industry-led research and development and its outcomes are centered on competitiveness, market growth, adaptability, and sustainability. It focuses on cutting-edge research and development that will improve the organic sector's competitiveness, market potential, adaptability and sustainability. In the next four years, 200 collaborating scientists will work together on several priorities to expand organic production, including: crop breeding for improved cultivars; developing new reduced tillage systems for organic crops; enhancing soil to improve plant health and developing new approaches to manage crop pests, diseases, and livestock parasites.

North America: Current statistics

Julia Lernoud[1], Helga Willer[2] and Bernhard Schlatter[3]

Organic agricultural land and producers

North America's organic agricultural land was 3 million hectares in 2013, which is 0.7 percent of the total agricultural area. The area under organic cultivation has almost trebled from the million hectares in 2000 and now represents seven percent of the global organic agricultural land. Between 2012 and 2013, the area increased by 35'000 hectares or 1.2 percent, due to an increase in the organic agricultural land in Canada. Data for the United States has not been updated since 2011. More than 1.3 percent of the farmland in Canada is organic, and the proportion in the United States is 0.6 percent. There is a total of 16'400 producers in North America; most of them are in the United States (almost 80 percent).

Land use

Detailed land use information was available for both countries. The organic agricultural area was mainly used for arable crops and permanent grassland/grazing areas, which constituted 80 percent of the organic agricultural land. While only two percent (67'089 hectares) was used to grow permanent crops.

The key *arable crop* group is cereals, which represent almost 50 percent of the organic arable area and are grown on 624'000 hectares. Wheat was the main cereal grown, with more than a third of the total arable area, with almost 220'000 hectares, followed by oats and maize. The key *permanent crops* were temperate fruits (more than 19'000 hectares), followed by grapes (almost 16'000 hectares), and nuts (9'463 hectares).

Market

In 2013, the organic market continued to grow in North America, reaching almost 27 billion euros. In Canada, the organic market grew by 10 percent in 2013, and in the United States the organic market grew by almost 11.5 percent. The United States is the largest single organic market in the world, and North America continues to be the continent with the largest organic market.

For more information about the Northern American figures, see data tables, page 249.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in North America: Graphs

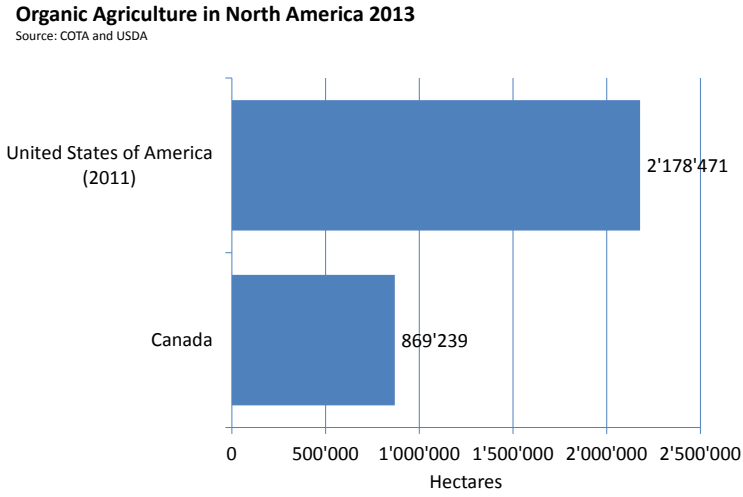

Figure 97: North America: Organic agricultural land in Canada and the United States 2013

Source: Canada Organic Trade Association and United States Department of Agriculture. US data from 2011

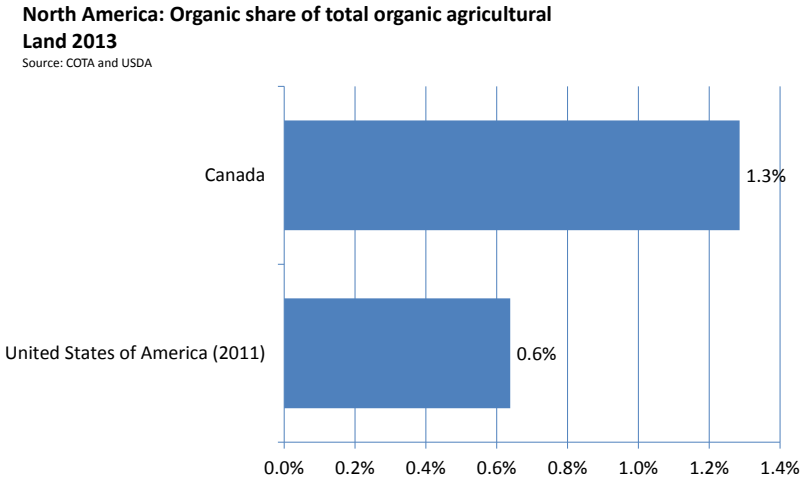

Figure 98: North America: Organic share of total organic agricultural land in Canada and the United States 2013

Source: Canada Organic Trade Association and United States Department of Agriculture. US data from 2011

North America: Development of organic agricultural land 2000-2013
Source: COG-COTA and USDA

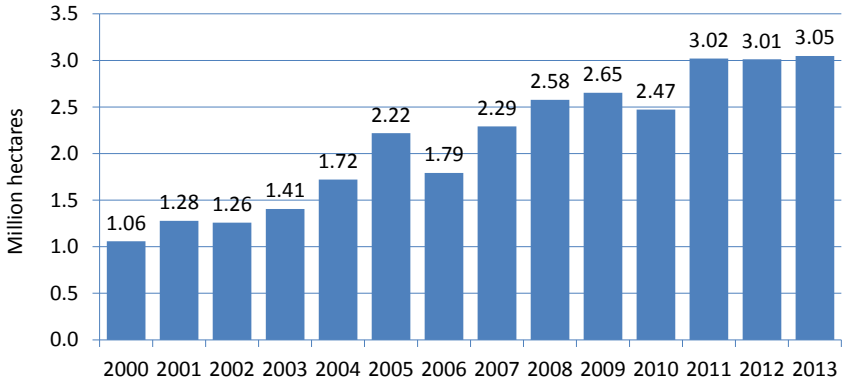

Figure 99: North America: Development of organic agricultural land 2000-2013 (for the US the latest available data are from 2011)

Source: Canada Organic Trade Association and United States Department of Agriculture

North America: Land use in organic agriculture 2013
Source: COTA and USDA

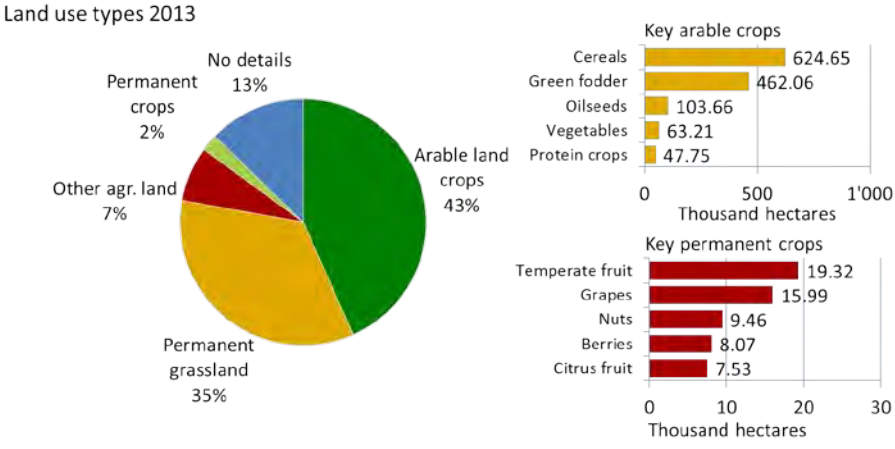

Figure 100: North America: Land use in organic agriculture 2013 (for the US the latest available data are from 2011)

Source: Canada Organic Trade Association and United States Department of Agriculture

Organic Agriculture in North America: Tables

Table 63: North America: Organic agricultural land, share of total agricultural land and number of producers 2013

Country	Area [ha]	Share of total agr. land [%]	Producers
Bermuda	Processing only		
Canada	869'239	1.3%	3'513
United States of America	2'178'471	0.6%	12'880
Total	3'047'710	0.7%	16'393

Source: Canadian Organic Growers (2013) and United States Department of Agriculture (2011); FiBL-IFOAM survey 2015

Table 64: North America: All organic areas 2013

Country	Agriculture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Total [ha]
Bermuda	Processing only				
Canada	869'239	68	4'317	71'821	945'444
United States of America	2'178'471				2'178'471
Total	**3'047'710**	**68**	**4'317**	**71'821**	**3'123'915**

Source: Canada Organic Trade Association (2013) and United States Department of Agriculture (2011); FiBL-IFOAM survey 2015

Table 65: North America: Land use in organic agriculture 2013

Land use	Crop group	Area [ha]
Arable crops	Cereals	624'649
	Flowers and ornamental plants	24
	Green fodder from arable land	462'059
	Hops	5
	Medicinal and aromatic plants	3'476
	Mushrooms and truffles	20
	Oilseeds	103'657
	Protein crops	47'753
	Root crops	7'914
	Strawberries	38
	Textile crops	8'679
	Tobacco	124
	Vegetables	63'214
	Arable crops, other	42
Arable crops total		*1'321'654*
Cropland, no details		388'912
Permanent crops	Berries	8'068
	Citrus fruit	7'528
	Fruit, temperate	19'321
	Fruit, tropical and subtropical	6'717
	Grapes	15'994
	Nuts	9'463
Permanent crops total		*67'089*
Permanent grassland		1'050'097
Other agricultural land total		219'957
Total		**3'047'710**

Source: Canada Organic Trade Association and United States Department of Agriculture. For the US, the latest available data are from 2011.

Oceania

Map 8: Organic agricultural land in the countries of Oceania 2013

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

Organics at all-time high in Australia[1]

AUSTRALIAN ORGANIC[2]

The Australian Organic Market Report (Australian Organic 2014) is a biennial publication commissioned by Australian Organic.[3] It tracks trends in the Australian organic marketplace based on research by the Mobium Group, the Swinburne University of Technology, and ABS[4] statistics. The following article is a summary of the key findings of the 2014 report.

The organic industry

The latest *Australian Organic Market Report* reveals a 15 percent growth in the Australian organic industry (retail sales and exports), now worth 1.72 billion Australian dollars[5] (approximately 1.3 billion euros). It demonstrates that consumption of certified organic food, cosmetics, and household products is at a record high in Australia. The biennial Australian organic industry report reveals that key categories are driving the exceptional growth results. The availability of organic products in major supermarkets and new, independent organic retailers is in part responsible for the growth; however, an extremely strong export market is supporting existing farmers and producers, as well as encouraging new entrants into the organic arena.

Key category findings

- Dairy is the fastest growing organic category in 2014; the farm-gate value of dairy products was 113 million Australian dollars (with a retail sales value of 325 million Australian dollars).
- With compound growth of 127 percent from 2011 to 2014, beef is the second fastest growing sector, with a total farm gate sales value of 198 million Australian dollars in 2014.
- The value of wine grape production increased by 120 percent between 2011 and 2014.
- The organic grain category has grown by 20 percent, with total farm gate sales rising by 67 percent in three years.
- There has been an 18 percent annual growth of organic cosmetics between 2009 and 2014, with skincare (35.4 percent) and hair care (33.7 percent) showing the greatest rise.

[1] Editors' note: This article summarizes the Organic Market Report as published by Australian Organic in 2014, which focuses on market-related information. For information on further aspects of organic agriculture in Australia we recommend the articles in previous editions of „The World of Organic Agriculture": the contributions by Wynen (2010 and previous), Wynen and Mitchell (2011-2013) and Mitchell and Kristiansen (2014). All former editions can be downloaded at http://www.organic-world.net/yearbook.html.

[2] Australian Organic, 18 Eton Street (PO Box 810) Nundah, Queensland, 4012, Australia, austorganic.com

[3] Australian Organic owns and supports Australia's largest organic certifying group Australian Certified Organic. Australian Organic started as Biological Farmers of Australia in 1987. For more information, see http://austorganic.com.

[4] ABS is the Australian Bureau of Statistics.

[5] One euro was 1.3777Australian Dollar (AUD) in 2013.

With demand for organic products outstripping supply, the Australian retail market for certified organic products is also expected to continue on this growth path with private label products, certified organic processed foods, and greater affordability driving this trajectory.

Most certified organic land

The 2014 report finds Australia still has the largest area of organic land in the world. It has 22 million hectares under organic farming. Most of the growth has been in the rangeland areas reflecting an increase in certified organic beef production. By June 2014, there were 17.15 million hectares[1] under full organic certification, 1.19 million under conversion to organic, and 4.31 million under precertification (it takes three years for a producer to become fully certified in Australia; the precertification is the first-year period). The state of Queensland has the largest area of certified land.

Farm gate sales

Dairy products make up 22.3 percent of Australia's organic farm gate sales, and dairy is the country's fastest growing organic category. The total farm gate value of dairy products is almost 114 million Australian dollars, up from 29 million in 2011. Three key dairy operators reported total farm gate sales of 166.7 million Australian dollars.

One significant contributor to this growth is the large certified organic yoghurt manufacturer five:am, which was sold to the UK's PZ Cussons in 2014. five:am achieved phenomenal growth in its short, three-and-a-half-year history, positioning itself well in two of Australia's largest supermarkets at competitive prices.

Meanwhile, the strong demand for certified organic beef continues. While the conventional beef industry expects growth in the one to two percent range, the organic beef industry enjoys stronger financial performance. Organic beef sales have increased substantially since 2012.

The total farm gate value of organic beef was 198 million in 2014, with compound growth of 127 percent from 2011 to 2014. The average growth for organic beef businesses in 2014 is 45 percent. With a value of 198 million Australian dollars, organic beef is worth 1.45 percent of the value of the conventional beef industry (13.6 billion Australian dollars).

Fruit and vegetables continue to be the most frequently purchased organic category in Australia. The sector is worth 234 million Australian dollars and makes up almost 12 percent of the organic industry.

Wine and beverages are worth 117 million Australian dollars. The cosmetic, personal care, and essential oil sectors grew by 18 percent from 2009 to 2014. The retail revenue of these categories is 236.1 million Australian dollars. The demand for certified organic grain in Australia continues to be strong; however, it is significantly undersupplied, causing concerns for industries downstream such as poultry, which relies on certified organic grain.

[1] As the data collection for "The World of Organic Agriculture 2015" refers to the data per end of 2013, this figure (17.15 million hectares) was used for the overall global statistics.

Retail sales

Organic retail sales (including non-food products) were valued at 1.39 billion Australian dollars in 2014. This constituted 0.97 percent of all retail sales. The most important product group were dairy products, which amounted to 325 million Australian dollars, followed by fruit and vegetables (210 million Australian dollars), and meat (165 million Australian dollars).

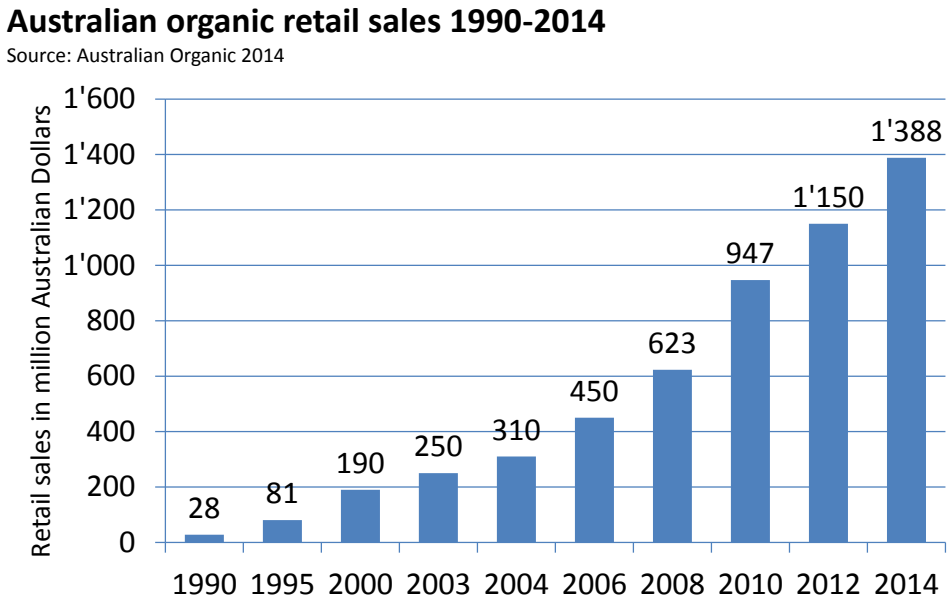

Figure 101: Australia: Growth of organic retail sales 1990-2014 (including non-food products)

Source: Australian Organic 2014

Exports

In 2014, the total export sales of all organic categories was 340 million Australian dollars. The value of Australian air freight exports of all food and beverages was 1.6 billion Australian dollars in 2012, which is 66 million Australian dollars or 4.3 percent higher than in 2011.

Imports

The value of imported organic products is 226 million Australian dollars, accounting for 13 percent of organic retail food sales. Imported conventional products are worth 11.3 billion Australian dollars and represent 8.3 percent of conventional retail food sales.

Although the share of imported organic ingredients and products in the total value of the organic industry has declined by 4 percent between 2012 and 2014, the ongoing demand for organic products means that imports will continue to increase comparatively. Imports such as Italian certified organic pastas and sauces will remain relatively cheaper because the economies of scale of their production outcompete

Australian operations. The ongoing strength of the Australian dollar continues to make imports comparatively cheap.

In other food categories, the decline of the Australian dollar increases opportunities for Australian manufacturers that have previously been priced out of the market. Australian supermarkets are also attempting to fill organic produce demand from local sources.

The Australian organic shopper

Each year, Australian grocery shoppers are asked a range of organic-specific questions. The 2014 survey results build on Mobium Group's six years of comparative data on primary household shoppers and also include some new questions to Australian consumers. The sample consisted of 1011 Australians aged 18 to 69.

Not surprisingly most certified organic products in Australia are purchased from supermarkets. Most organic shoppers buy their organic products from supermarkets. Ninety five per cent of organic buyers shop for organics in a major supermarket on occasion. Next is greengrocers (75 percent), then markets (73 percent) and organic/whole food stores (54 percent). As was the case in 2012, many organic shoppers regularly shop at a variety of outlets to meet their organic purchasing needs.

One third of shoppers say they would only buy a product labelled as 'organic' if it is certified organic.

Price/value continues to be the biggest barrier to buying organic, 82 percent of respondents say they're a barrier compared with 80 percent in 2012. The second biggest barrier is 'knowing you can trust it's organic' (43 percent compared with 48 percent in 2012).

Mobium Group's findings suggest demographic characteristics are not the best predictor of whether a consumer will buy organic. Rather, a person's values concerning personal, community, and planetary wellbeing are the best indicators of a consumer preference for organic food. Shoppers who are strongly aligned with these issues are the primary participants in the organic market. Indeed, in fresh produce, consumer alignment with these values leads to participation rates that are two to three times higher than the overall average.

One of the most interesting findings is that organic purchases by those who are not categorised as green or sustainable shoppers increased from 24 percent in 2012 to 40 percent in 2014. These are the consumers who are driving the growth of certified organic goods in Australia. The increasing availability of organic products in supermarkets is one of the reasons for this trend.

The Australian Organic Market Report also found that the perceived benefits of organic foods are consistently associated with what organic food does not contain and is not produced with. The top six perceived benefits are: chemical free (80 percent), additive free (77 percent), environmentally friendly (68 percent), hormone and antibiotic free (meat) (60 percent), non-GM and free range (each 57 percent).

Free range, cruelty-free, pasture-fed and sustainably-fished are four new attributes added to the 2014 consumer survey. We also asked organic shoppers to state which of the known benefits of organic are important to them. Shoppers are particularly

interested in 'What's in it for me?' benefits. A comparison with the *Australian Organic Market Report 2012* research shows characteristics that deliver personal health/wellness outcomes resonate strongly with most shoppers.

Most organic shoppers allocate 5 percent or less of household food expenditure to organic purchases. Forty-four per cent say this is their total estimated spend. A cluster of highly committed organic purchasers exists within the current market, with 10 percent saying they usually outlay 40 percent or more of their household food spending on organic products. As noted earlier, the growth in new consumers purchasing some organic is growing the organic industry overall, as the committed end of the market may be saturated.

Figure 102: The two best known Australian logos: Australian Certified Organic and NASAA

Recognition of the Australian Certified Organic logo increased from 31 percent in 2012 to 38 percent in 2014, making it the most recognisable logo among consumers. It is followed by the logo of NASAA[1], the National Association for Sustainable Agriculture, Australia (23 percent compared with 19 percent in 2012) and the United States logo USDA Organic (7 percent, the same as 2012).

Contact

Kathy Cogo, Communication manager, Australian Organic, kathy.cogo@austorganic.com, austorganic.com

Reference

Australian Organic (Ed) (2014): Australian Organic Market Report 2014. Research by Swinburne University of Technology, the Australian Bureau of Statistics and Mobium Group. Australian Organic, Nundah. Available from http://austorganic.com/wp-content/uploads/2014/11/AO_Report_2014_web.pdf

[1]Formed in 1986, The National Association for Sustainable Agriculture, Australia (NASAA) supports the education of industry and consumers on organic, biodynamic and sustainable agricultural practices. NASAA is committed to developing and maintaining organic standards; assisting operators in gaining organic certification; and conducting ongoing compliance supervision.

The Pacific Islands

KAREN MAPUSUA[1]

Recent important developments

The years 2013 and 2014 saw a significant increase in interest in Participatory Guarantee Systems (PGS) in the Pacific Islands as market opportunities for PGS certified products evolved, and examples were generated of how organic and PGS can be tools for holistic and sustainable social and economic development. In 2013, the International Fund for Agricultural Development (IFAD) began collaboration with the Pacific Organic and Ethical Trade Community (POETCom) in developing models for Participatory Guarantee Systems (PGS) tailored to the diverse situations of Pacific organic growers. With learning from the first Pacific PGS BioCaledonia and BioFetia in New Caledonia and French Polynesia respectively, three pilot PGS are currently under development in Fiji and Kiribati, focusing on specific products (virgin coconut oil, coco sap sugar and papaya).

In Sabeto, Fiji, a youth group has formed a PGS to certify and export organic papaya into New Zealand, an unregulated market, to a well-established organic and fair trade buyer. This negotiation involved visits of the buyer to inspect the PGS systems, and if consumers accept the certification, it will potentially open doors for other PGS certified products to enter New Zealand, the closest market.

Cicia (Lau Islands Fiji) is producing virgin coconut oil (VCO) and selling to a Fijian high end tourist resort and spa and also to a non-organic market in Korea. And Abaiang, Kiribati is being certified and producing sugar from coconut sap targeting regional markets and a fair trade importer and retailer in New Zealand.

The island communities of Cicia and Abaiang fully embraced the idea of organic and PGS – the traditional leadership engaged in both islands and decided that they would declare their whole islands organic. The PGS then puts form and rigour around that declaration, providing systems to verify compliance with the Pacific Organic Standard. The PGS is greatly strengthened by the support and direction of the traditional leadership. In Abaiang in Kiribati, a bylaw is being established and the island's development plan is framed around maintaining the organic status of the island. Abaiang is the focus of many development projects due to its vulnerability to climate change impacts (it is a low coral atoll less than 1 metre above sea level), the organic bylaw and PGS now forms a framework giving the community a valuable tool for managing these different interventions and deciding what will benefit their community in the long run.

In Cicia, the local high school is fully involved in the PGS: They provide quality control of VCO through the science curriculum, business planning through the commerce students and organics through the agriculture curriculum. The PGS also galvanised the community when there was an offer to bring in a saw mill and treatment plant to log the pine forest on Cicia. The timber treatment plant would have meant the island risking its

[1] Karen Mapusua, Coordinating Officer, Pacific Organic and Ethical Trade Community (POETCom), Increasing Agricultural Commodities Trade (IACT), Land Resources Division, Secretariat of the Pacific Community, Private Mail Bag, Suva FIJI, www.spc.int

organic status; the community decided not to accept the mill, as they were committed to the long-term benefits of organics. Cicia is now in discussion with the Forestry Department for a project to replant native trees, improving biodiversity and providing possible income sources from non-timber forest products.

The year 2014 also saw BioCaledonia achieve recognition by IFOAM and become registered on the IFOAM PGS database. BioCaledonia now has 50 certified farmers, and producers sell products through basket schemes (the Pacific version of box schemes, as baskets woven from coconut fronds are used for delivery), and local organic retailers. Additionally, in 2014, they opened their own outlet. In September 2014, Samoa hosted the United Nations Small Islands Developing States (SIDS) Conference. The SIDS are a special group in the United Nations system due to the particular vulnerabilities and development challenges of small islands. The outcome document for the conference, the "SIDS Accelerated Modalities of Action (SAMOA) Pathway," is a commitment by the United Nations to address priorities for SIDS in achieving the future we want. The document refers to sustainable agriculture in several sections, and organic production is specifically mentioned for support in the section on biodiversity.

“We recognize that, overall, small-island developing states have extraordinary marine and terrestrial biodiversity that, in many cases, is fundamental to their livelihoods and identity. Noting that this valuable biodiversity, and the ecosystem services it provides, are at grave risk, we strongly support the efforts of small-island developing states to:

(a) conserve biological diversity, the sustainable use of its components, and the fair and equitable sharing of the benefits arising out of the utilization of genetic resources;

(b) export organic, natural, sustainably produced, and locally grown products;

(c) access financial and technical resources for the conservation and sustainable management of biodiversity.”

IFOAM hosted, together with POETCom, the International Fund for Agricultural Development (IFAD), the Secretariat of the Pacific Community, and the Government of Samoa's side event "Organic Islands: Role and Potential of Organic Agriculture for Sustainable Development." The event showcased learning from the Pacific to demonstrate the potential for organic agriculture partnerships to provide for sustainable economic development while also addressing other themes of the conference, including climate change, biodiversity, and social development. The event was very well-received by the conference and had one of the largest attendances of all the more than 70 side events. Keynote speakers included the prime minister of Samoa and the IFOAM president. The event raised the profile of organics in the Pacific region. The other major development in 2013/2014 was the implementation of POETCom's membership policy, which formalized procedures for membership and strengthened governance for the movement. POETCom now has 30 members across 13 Pacific Island countries.

History

Currently, farming practices in many Pacific communities are largely organic. These practices are based on "age-old" systems that are free from the residues of agrochemicals and that allow environmental integrity to remain largely intact. However, the motives for organic farming have changed. In the past, farming was predominantly for subsistence living, but in today's cash-driven societies, overseas markets must ensure

that products being labeled and sold as organic produce meet international standards. Third-party certification began in the Pacific in the late 1980s, but it has been slow to develop. The organic movement recognized that one of the major challenges facing Pacific Island organic producers was the high cost of certification, auditing, and compliance involved in meeting the standards of importing countries.

In order to address this issue, two projects that commenced in 2007 have been undertaken, funded by the International Fund for Agricultural Development and implemented by the International Federation of Organic Agriculture Movements (IFOAM) and the Secretariat of the Pacific Community (SPC) respectively. The main outcomes of these projects were

– an analysis of the existing situation of organic agriculture and fair trade production in the Pacific islands and
– a set of Pacific Regional Standards for Organic Agriculture Products, which was developed through a locally owned process and multi-sector participation.

These projects also facilitated development of a regional strategy and national plans to lay the foundation of sustainable organic agriculture development in the region. Two key groupings that were tasked with driving organics forward in the Pacific were formed: The first, the Regional Organic Task Force (ROTF) is a technical group representing all sectors and countries involved in organics. This group was charged with developing the Pacific Standard and will be responsible for implementing the Regional Action Plan. The second group, the Pacific High Level Organics Group (PHLOG), consists of Pacific leaders who have shown a commitment to organics development in the region and provide high-level political support and advocacy.

The first Pacific Organic Standard was officially launched by the Chair of the PHLOG and Prime Minster of Samoa, at the Ministers' of Agriculture and Forestry Conference in Apia Samoa in September 2008. This provides a platform for further regional policy development around organics.

In 2009, the ROTF recognized the need to evolve from a technical body to a representative peak body for organics and fair trade in the region, and thus, the Pacific Organic and Ethical Trade Community (POETCom) was formed.

POETCom established its secretariat in the Land Resources Division of the Secretariat of the Pacific Community in Suva Fiji in 2012, with funding support from the European Union-funded "Increasing Agricultural Commodities Trade" (IACT) project. This has enabled steady progress with coordinated development across the region. The year 2012 also saw the Pacific Organic Standard welcomed into the IFOAM Family of Standards; and the Pacific's second Participatory Guarantee System, *Bio Fetia* from French Polynesia, registered to use the "Organic Pasifika" Mark.

A significant development for 2012 was the resolution of the Heads of Agriculture and Forestry Services (HOAFS) for the Pacific Islands[1] at their biannual meeting to "promote and mainstream organic agriculture into SPC and national agriculture strategies in

1 The Heads of Agriculture and Forestry Services (HOAFS) meet every two years. HOFAS consists of the agriculture department heads of the 22 SPC island countries and territories. The Ministers of Agriculture and Forestry (MOAF) meet every four years.

recognition of its role in food and nutritional security, climate change adaptation and mitigation, enhancement of biodiversity and the livelihood opportunities it can provide".

The Ministers of Agriculture endorsed this resolution in the Communiqué following their meeting in Nadi in September 2012.

The year 2013 also saw developments the implementation of the export support scheme as part of the Pacific Organic Guarantee Scheme, with an MOU signed between POETCom and three certifying bodies: BioAgricert (Italy), Biogro (New Zealand), and the National Association of Sustainable Agriculture Australia. The purpose of the MOU is to provide certification services to the Pacific Organic Standard, allowing Pacific producers to export under the Pacific Organic Standard for the first time, and allows commencement of the marketing of a regional organic brand, "Organic Pasifika."

Key actors

Developments in organic agriculture are being spearheaded by the Pacific High Level Organics Group (PHLOG), the Secretariat of the Pacific Community (SPC), POETCom, and the POETCom Focal Points in each Pacific Island country, including:

- BioCaledonia, New Caledonia
- Bio Fenua, French Polynesia
- Farm Support Organisation, Vanuatu
- Fiji Organic Association, Fiji
- Kastom Gaden Association, Solomon Islands
- Zai Na Tina Organic Demonstration Farm, Solomon Islands
- Niue Organic Farmers Association
- Palau Organic Farmers Association, Palau
- Chamber of Agriculture Wallis and Futuna
- Titikaveka Growers Association, Cook Islands
- Tonga National Youth Congress, Tonga
- Women in Business Development Incorporated, Samoa

The movement remains farmer- and farm support organization driven, with support building from national governments as awareness of the potential for organics increases. Regional research and academic institutions are also engaged, including the University of the South Pacific and the National Agricultural Research Institutes of Papua New Guinea.

Exports

Most of the organically certified products from the region are for export. The following is a summary table listing the main crops which are currently organically certified and exported from the Pacific region:

The main international markets for the listed products are Australia and New Zealand, representing the main destination for the export of organic products due to the proximity. Japan is a growing market, and other markets include North America and the European Union.

Table 66: Pacific Region: Main crops, which are currently organically certified and exported

Products	Countries
Vanilla, ginger & other spices & nuts	Fiji, Vanuatu, Niue
Cocoa	Vanuatu, Samoa, Papua New Guinea
Virgin Coconut Oil	Samoa, Fiji, Solomon Islands
Coconut meal	Vanuatu
Nonu/noni (Morinda Citrifolia)	Cook Islands, Samoa, Fiji, Niue, French Polynesia
Honey	Niue
Papaya (pawpaw)	Fiji
Bananas	Fiji, Papua New Guinea, Samoa
Coffee	Papua New Guinea, Samoa
Beef	Vanuatu

There is growing interest and activity in the area of Fair Trade programmes, and certification and efforts are being made by POETCom to link organic producers into these systems as a way of adding further value to products and ensuring maximum benefits to the farmers. There is also interest in the area of identifying trading models outside the well-known fair trade certifications that may be better suited to Pacific communities and producers. For example, Heilala Vanilla, a Tongan/New Zealand vanilla exporter, has recently established a community development trust, and a percentage of each sale is channelled into the trust for community development projects in the areas they buy vanilla, on top of their long-term buying arrangements and above market rate price to farmers.

Domestic markets

Generally, the domestic markets for organic certified products are not very developed and in some cases are non-existent. Organic products are commonly sold as conventional, without premium prices or any acknowledgement of the organic status of the product. Some initiatives are ongoing or are in the pipeline to promote consumer awareness about organic products, in particular by linking the concept of organic with local food consumption as part of a strategy to reduce non-communicable diseases, which are a major health issue in the Pacific Islands. Interesting opportunities are now being explored within the tourist structures of several countries that are facing a growth in the presence of tourists (e.g. Fiji, Vanuatu, Cooks and Samoa), focusing on development of Pacific cuisine and linking smallholder organic farmers directly with tourism and hospitality providers. There is at least one upmarket resort in Fiji, which has its island organically certified and is committed to serving guests organic produce from its land.

The growth in interest in PGS in several countries also implies that there is an opportunity for further development of domestic markets. The acceptance of PGS certification across the region may also enhance the development of regional trade in organic goods.

Legislation

Despite the policy brief on organic agriculture of the Secretariat of the Pacific Community (SPC) developed in 2009, there have been no significant changes in legislation in the region. The policy brief aims to assist Governments and others in the

region develop relevant policy focuses on how organic agriculture can assist in meeting regional challenges and outlines seven initial policy recommendations.

Increasingly organic agriculture is gaining mention and recognition in national policy and planning documents, such as the recent "Over arching sector plan for productive industries" in Vanuatu and the Solomon Islands Organic Policy, but this has not evolved into legislation. Once again, there are resource constraints at national levels in moving this agenda forward but the recent endorsements of organics by the HOAFS and MOAFS may provide further impetus for this development.

Government and international support

The Secretariat of the Pacific Community (SPC), as a regional intergovernmental organization, continues to provide support for coordination. It now houses the POETCom secretariat. However, the need for developing a longer-term financing strategy to support the movement is critical. In 2013 and 2014, POETCom received development assistance from the European Union (EU), the International Fund for Agricultural Development (IFAD), the French Pacific Fund, and the United Nations Development Programme (UNDP), predominantly for training and capacity building activities at the country level. POETCom national affiliates continue to receive assistance from partners such as OXFAM New Zealand, the Canada Fund, UNDP small grants programmes, and bilateral donor assistance from Australia and New Zealand. In a few cases, national governments also provide financial support, an example being the Government of Samoa, which funds the costs of third-party certification for the country's largest organic smallholder group through Women in Business Development

Outlook

Sustainable resourcing for the secretariat and core services of POETCom presents a challenge, and beyond February 2015, the future is uncertain. However, as governance and management structures are strengthened, and with the implementation of the Pacific Organic Guarantee System, in particular the elements of PGS, the export certification scheme and regional organic branding continues through 2014. The growth and momentum are likely to continue even if the movement has to take on the management roles voluntarily. The Secretariat of the Pacific Community (SPC) is considering mechanisms which would facilitate the mainstreaming of organics into strategy and planning across programmes, including public health, fisheries, energy, and agriculture. This will provide a solid basis for incorporating organics as a development tool, but financial support will be required to develop the Pacific Organic Guarantee Scheme fully. There is also an expectation that the local market for organic products will start to expand as the tourism and hospitality industries start to look towards organics and sustainability as part of the Pacific Islands brand.

Links/Further reading

- Secretariat of the Pacific Community, www.spc.int
- POETCom web pages, http://www.spc.int/lrd/index.php?option=com_content&view=article&id=745&Itemid=495
- Pacific Organic Standard, http://www.spc.int/lrd/lrd/New_LRD_Publications.htm
- Putting Down Roots; POETCom Annual Report 2012, http://www.spc.int/lrd/index.php?option=com_docman&task=cat_view&gid=371&Itemid=517
- Growing Our Future POETCom Strategic Plan 2013 – 2017 http://www.spc.int/lrd/index.php?option=com_docman&task=cat_view&gid=365&Itemid=517

Oceania: Current statistics

JULIA LERNOUD[1], HELGA WILLER[2] AND BERNHARD SCHLATTER[3]

Organic agricultural land

Organic agricultural land in Oceania reported an important increase in 2013, reaching to 17.3 million hectares, which constituted 4.1 percent of the total agricultural area in the region. This increase should be attributed to an update of the Australian area data, where five million hectares more were reported after some years of no data updates. Forty percent of the world's organic agricultural land is in Oceania. The area under organic production has more than trebled since 2000 (5.3 million hectares). Between 2012 and 2013, the area increased in further countries such as Vanuatu, Tonga, and Fiji.

The country with the biggest organic agricultural area is Australia, with 17.2 million hectares, and the highest proportion of organic agricultural land is in Samoa, with more than 10 percent of all farmland under organic cultivation.

Land use

In 2013, almost 97 percent of all organic farmland in Oceania was grassland/grazing areas (16.7 million hectares). Detailed data on land use categories and arable and permanent crops was, however, not available for most of the countries.

Producers

There were almost 23'000 producers in the region, with the largest number of producers in Papua New Guinea (18'000), Australia (1'707), and New Zealand (987 producers).

Market

In 2013, market data was only available for Australia and New Zealand. The total organic market value (the sum of these two countries) was almost 1.1 billion euros. The largest market was Australia with almost 1 billion euros. The annual organic consumption is 41 euros per person in Australia and 19 euros per person in New Zealand.

For more information, see data tables, page 268.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Oceania: Graphs

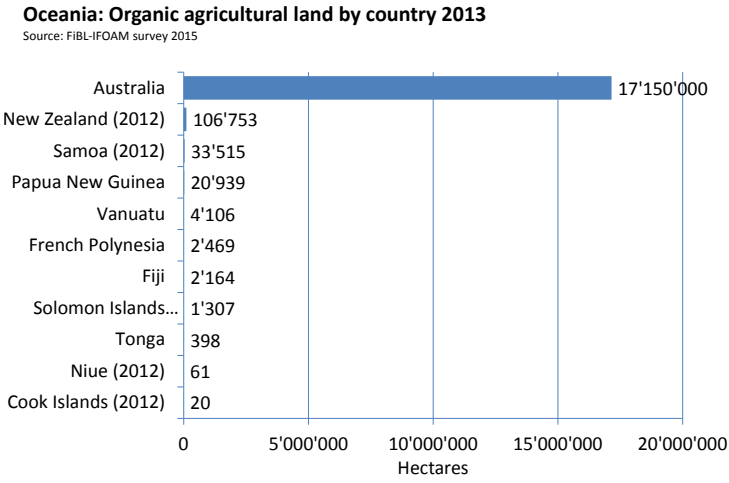

Figure 103: Oceania: Organic agricultural land by country 2013

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

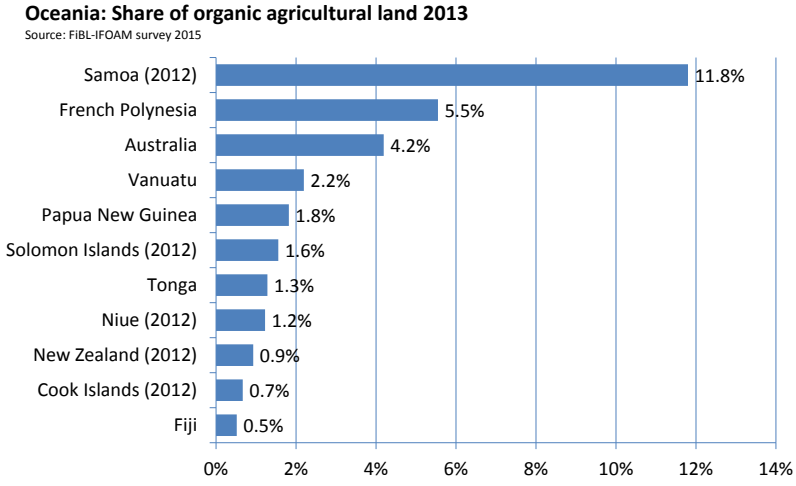

Figure 104: Oceania: Share of organic agricultural land 2013

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

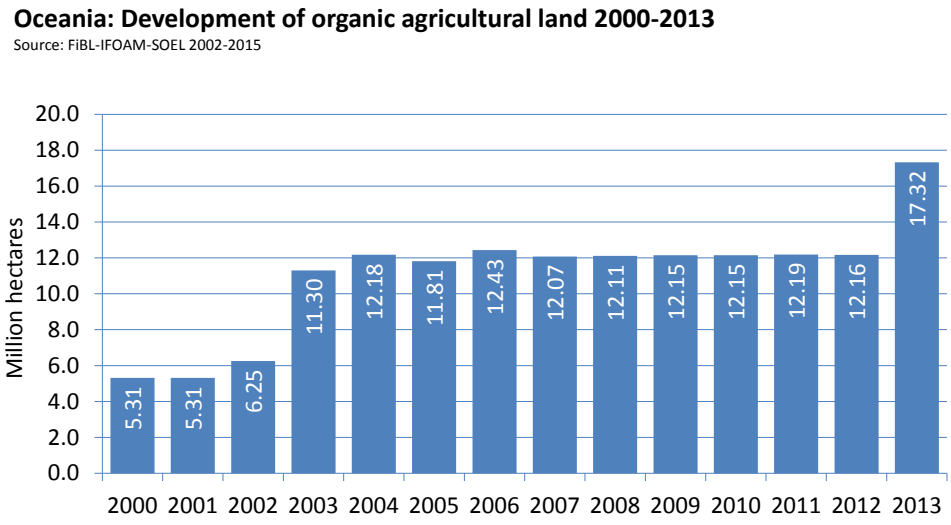

Figure 105: Oceania: Development of organic agricultural land 2000-2013

Source: FiBL-IFOAM –SOEL 2002-2015; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 281.

Organic Agriculture in Oceania: Tables

Table 67: Oceania: Organic agricultural land, share of total agricultural land and number of producers 2013

Country	Area [ha]	Share of total agr. land [%]	Producers
Australia	17'150'000	4.2%	1'707
Cook Islands	20	0.7%	44
Fiji	2'164	0.5%	171
French Polynesia	2'469	5.5%	22
New Caledonia	PGS group (area data not available)		50
New Zealand	106'753	0.9%	987
Niue	61	1.2%	122
Papua New Guinea	20'939	1.8%	17'948
Samoa	33'515	11.8%	743
Solomon Islands	1'307	1.6%	384
Tonga	398	1.3%	123
Vanuatu	4'106	2.2%	696
Total	**17'321'733**	**4.1%**	**22'997**

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

Table 68: Oceania: All organic areas 2013

Country	Agriculture [ha]	Wild collection [ha]	Total [ha]
Australia	17'150'000		17'150'000
Cook Islands	20		20
Fiji	2'164	653	2'817
French Polynesia	2'469		2'469
New Zealand	106'753		106'753
Niue	61	112	173
Papua New Guinea	20'939		20'939
Samoa	33'515		33'515
Solomon Islands	1'307		1'307
Tonga	398		398
Vanuatu	4'106		4'106
Total	**17'321'733**	**765**	**17'322'498**

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

Table 69: Oceania: Land use in organic agriculture 2013

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		435'731
Arable crops	Arable crops, no details	34206.8
	Cereals	2724
	Medicinal and aromatic plants	110
	Oilseeds	217
	Protein crops	18
	Strawberries	15
	Vegetables	1388
Arable crops total		*38'679*
Cropland, no details		48'351
Permanent crops	Berries	15
	Citrus fruit	480
	Cocoa	31
	Coconut	3'521
	Coffee	18'308
	Fruit, temperate	1'282
	Fruit, tropical and subtropical	455
	Grapes	2'782
	Nuts	8'800
	Olives	470
	Permanent crops, other	34'806
Permanent crops total		*70'950*
Permanent grassland		16'728'022
Total		**17'321'733**

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

Outlook

Moving Toward Organic 3.0

Markus Arbenz[1]

The Organic World Congress 2014, held in Istanbul, had many insightful messages on what Organic 3.0 could mean: "Rather than simply focusing on the niche we have created, we should build bridges beyond our movement with a strategy of action rather than word!"

Organic 3.0 was launched at Biofach Nuremberg 2014, and the further development of its content is an ongoing process. The main drivers here are the BIOFACH Congresses, the IFOAM Organic World Congresses, and various emerging think tanks such as SOAAN, the Sustainable Organic Agriculture Action Network. All have started working on a concept of what the future of organic agriculture could be like.

BIOFACH: The launch and first ideas

Information gathered at eight events in February 2014 and from the study "Organic 3.0" (Zukunftsinstitut Österreich 2014) brings us to the conclusion that organic has not yet reached the center of society, although significant developments and successes are to be noted. More consumer awareness for true sustainability is required. The organic sector should broadly discuss and provide more trust-building evidence showing that organic production and consumption is a pathway to sustainability, without overwhelming consumers with complexity. Organic 3.0 should address lifestyle issues and build a social network. Innovations are required on all levels, exploring not only technical but also spiritual solutions and building people's values and integrity while addressing all dimensions of sustainability. An exclusive profile on the market and in the political debate are the paths to social innovation and success. Transparency, credible values, and local authenticity will play major roles in future markets. In order to reach consumers with light-hearted and convincing communications, the sector requires young, innovative leaders with new ideas. The next generation should be given the chance to co-create and assume responsibility.

Empowering farmers to secure their livelihoods remains a hot issue. Organic 3.0 cannot just be a societal trend; it must be farmer-led, and their needs and authenticity must spearhead strategies. To remain credible, Organic 3.0 has to look beyond certification, e.g. Participatory Guarantee Systems (PGS) and social guarantees, and avoid the traps of the present (temporary) successes.

Organic World Congress: Inspiring a clear direction

The 18th Organic World Congress 2014 was attended by 1'100 participants from over 80 countries. They spoke of the growing awareness, beyond the organic movement, of the contributions organic agriculture can make to overcoming major global challenges, particularly concerning environmental degradation, climate change, and soil fertility. The benefits to society in terms of food security, nutrition, health, and poverty

[1] Markus Arbenz, Executive Director, IFOAM - Organics International, Bonn, Germany, www.ifoam.bio

reduction are gaining recognition among scientific, governmental, and intergovernmental institutions.

Thus, Organic 3.0 should better position organic as a practical tool to be used in implementing sustainability policies and development agendas. This requires stakeholders to be humble, realistic, and confident in their communications on what organic agriculture can deliver.

Regarding organic agriculture requirements, Organic 3.0 should move from demanding minimum requirements only (standards) to the continuous development of true sustainability of all operations from field to plate. An expansion of possible and alternative tools for demonstrating compliance is required both for better tailoring to operator-specific situations and for reducing bureaucracy. These tools may include showcasing transparency or traceability while using new information technologies. It may also include the demonstration of the impacts of the system and true cost accounting. Enhancing consumer trust requires simple and inclusive systems that are not only formally correct, but also facilitate relationships and engagement. Short value chains between producers and consumers are excellent options, including supplying to schools and urban farming.

What enables organics to grow is the "specific to local" context. One important driver in all regions is market pull. Therefore, Organic 3.0 needs engagement with the different market actors of the value chain, including food, textiles, cosmetics, and others. A mix of different market channels (formal and informal ones) needs to be addressed to reach consumers. Reaching consumers also requires appropriate messaging to create awareness about the benefits of organic agriculture both for the common good, e.g., biodiversity, animal welfare, and landscape, and for individual benefits, e.g., health, taste, and authenticity.

Governments can drive change by introducing supporting measures, but they can also hinder the development of organic sectors through overregulation or through ill-advised subsidies. In order to provide organic farmers a perspective for the future — especially for the new generation — efforts are needed beyond increasing operator-specific productivity and profitability. It will be important to develop rural economies and create jobs, invest in local infrastructure and value addition, and build capacities and foster innovation through participatory research.

The complex nature of organic agriculture and the interlinked multiple benefits of organic systems pose a challenge to organic stakeholders when planning and carrying out communications activities. Therefore, key elements of effective communication include a breakdown of the complex benefits to understandable issues that are of concern in a specific context. Organic advocates need to argue with proven environmental and social impact, and they need to use the power of factual evidence and emotions.

To achieve substantial growth beyond the niche, alliances outside the organic world are imperative. Regulatory changes as the main drivers of growth can only be realized if the organic world develops convening power with like-minded initiatives, even if they are potential competitors. Priorities for regulatory changes include the handling of risky substances and avoidance of contamination, access to genetic and other natural resources, and the reduction of harmful subsidies. There is a need for a more consequent

application of the polluter pays principle and broad introduction of true cost accounting, including internalization of external costs and benefits.

SOAAN and others: Think tanking the content

The Sustainable Organic Agriculture Action Network (SOAAN) is one of the think tanks that integrates the debate into a common understanding and comprehensive plan for Organic 3.0. It will publish its Organic 3.0 contents and concepts as a culmination of the Organic Expo 2015 in South Korea under the patronage of Goesan County. SOAAN defines the aspirations of Organic 3.0 as breaking the organic sector out of its niche status and becoming the mainstream approach to sustainability worldwide. Organic 3.0 improves and builds on Organic 2.0 to meet the apex challenges modern society faces, such as food security, climate change, poverty alleviation, hunger, health, and biodiversity stewardship.

Organic 3.0 delivers on the Principles of Ecology and Health by demonstrating how the adoption of best organic practices in farming, animal husbandry, and environmental stewardship better attains sustainability. Based on an approach of common interest, mutual support, and organized responsibility across the value chain, from producer to consumer, Organic 3.0 manifests the Principles of Fairness and Care; it enables the organic movement to expand by being inclusive of more producers and building bridges to like-minded organizations and individuals.

Reference

Zukunftsinstitut Österreich (2014): Organic 3.0: Trend- und Potentialanalyse für die Zukunft. Zukunftsinstitut Österreich, Wien and BIOFACH Nürnberg. Available at https://www.biofach.de/de/presse/organic-studie/

Annex

The FiBL-IFOAM Survey: Overview Table

Table 70: Organic agricultural land, share of total agricultural land, number of producers, and domestic sales 2013

Country	Area [ha]	Share of all agr. land [%]	Producers	Retail sales [Mio €]
Afghanistan	61	0.0002%	264	
Albania (2012)	662	0.05%	46	
Algeria	700	0.002%	57	
Andorra	1	0.01%		
Angola	2'486	0.004%		
Argentina	3'191'255	2.27%	1'018	
Armenia	1'000	0.06%	21	
Australia	17'151'000	4.19%	1'707	962
Austria	526'689	19.46%	21'810	1'065 (2011)
Azerbaijan	23'331	0.49%	288	3 (2011)
Bahamas	49	0.47%		
Bangladesh	6'860	0.07%	9'335 (2011)	
Belarus		Wild collection only		
Belgium	62'529	4.56%	1'487	403
Belize	1'982	1.30%	900	
Benin	1'987	0.06%	2'355	
Bermuda		Processor only		
Bhutan	6'726	1.33%		
Bolivia (2011)	32'710	0.09%	9'837	
Bosnia and Herzegovina	292	0.01%	24	0
Brazil	705'233 (2012)	0.27%	12'526 (2012)	700
Bulgaria	56'287	1.85%	3'854	7 (2010)
Burkina Faso	16'689	0.14%	11'395	
Burundi (2011)	550	0.03%	36	
Cambodia	9'889	0.18%	6'753	
Cameroon	663	0.01%	88 (2012)	
Canada	869'239	1.29%	3'513	2'375
Chad		Wild collection only		
Channel Islands (2012)	260	2.95%		
Chile	23'469	0.15%	446	2 (2009)
China	2'094'000	0.40%		2'430
Colombia	31'621	0.07%	4'775 (2011)	
Comoros (2011)	2'642	1.70%	1'416	
Cook Islands (2012)	20	0.67%	44	
Costa Rica	7'449	0.41%	3'000 (2009)	1 (2008)
Côte d'Ivoire	19'263	0.09%	277	
Croatia	40'641	3.06%	1'608	104 (2012)
Cuba	7'389	0.11%	2	
Cyprus (2012)	3'923	2.69%	719	2 (2006)
Czech Republic	474'231	11.16%	3'910	70 (2012)
Democratic Republic of the Congo	51'838	0.23%	1'123	
Denmark	169'298	6.40%	2'589	917

Annex: Table: Organic Agricultural Land, Producers, Domestic Sales

Country	Area [ha]	Share of all agr. land [%]	Producers	Retail sales [Mio €]
Dominica (2011)	240	0.98%		
Dominican Republic	180'609	9.28%	24'412	
Ecuador	42'781	0.57%	9'245	
Egypt	85'801 (2012)	2.33%	790 (2009)	
El Salvador	6'736 (2008)	0.44%	2'000 (2007)	
Estonia	151'256	16.01%	1'553	22
Ethiopia (2012)	164'777	0.46%	134'626	
Falkland Islands (Malvinas)	403'212	36.34%	8	
Faroe Islands	253	8.43%		
Fiji	2'164	0.52%	171 (2012)	
Finland	206'170	9.02%	4'284	215
France	1'060'756	3.86%	25'467	4'380
French Guiana (France)	2'702	11.90%	43	
French Polynesia	2'469	5.55%	22	
Georgia (2011)	1'999	0.08%	150	
Germany	1'060'669	6.35%	23'271	7'550
Ghana	28'201	0.18%	1'915	
Greece	383'606	4.63%	23'433 (2012)	60 (2010)
Grenada (2010)	85	0.68%	3	
Guadeloupe (France)	193	0.46%	34	
Guatemala	13'380 (2011)	0.30%	3'008 (2010)	
Guinea-Bissau	1'843	0.11%		
Guyana		Wild collection only		
Haiti	2'878	0.16%	1'210	
Honduras	24'950 (2012)	0.78%	4'989 (2011)	
Hungary	140'292	3.32%	1'673	25 (2009)
Iceland	9'710	0.43%	33	
India	510'000	0.28%	650'000	130 (2012)
Indonesia	65'688	0.12%	5'700	
Iran (Islamic Republic of)	12'156	0.03%	1'663	
Iraq	40	0.001%		
Ireland	52'793 (2012)	1.28%	1'263 (2012)	99 (2011)
Israel	7'471	1.43%	326	
Italy	1'317'177	10.29%	45'969	2'020
Jamaica	542	0.12%	80	
Japan (2012)	10'611	0.27%	2'130	1'000 (2009)
Jordan	2'898	0.28%	98 (2012)	
Kazakhstan (2012)	291'203	0.14%		
Kenya	4'894 (2012)	0.02%	12'647 (2011)	
Kosovo	114	0.03%	10	
Kyrgyzstan	2'856	0.03%	1'128	0
Lao PDR	6'442	0.27%	1'342 (2011)	
Latvia	200'433	11.04%	3'473	4
Lebanon	2'571	0.37%	132	
Lesotho	560	0.02%	2	
Liechtenstein	1'137	30.99%	38	5 (2012)
Lithuania	166'330	5.74%	2'555	6 (2011)
Luxembourg	4'448	3.40%	212	84

Annex: Table: Organic Agricultural Land, Producers, Domestic Sales

Country	Area [ha]	Share of all agr. land [%]	Producers	Retail sales [Mio €]
Macedonia (FYROM)	3'146	0.29%	382	
Madagascar (2012)	30'265	0.07%	14'550	
Malawi	265	0.005%		
Malaysia	603	0.01%	119	
Mali	3'727	0.01%	8'048	
Malta (2012)	37	0.36%	12	
Martinique (France)	269	0.96%	39	
Mauritius (2011)	16	0.02%	3	
Mayotte	5	-	2	
Mexico	501'364	2.33%	169'703	14
Moldova (2011)	22'102	0.89%	172	
Mongolia	12'922	4.68%		
Montenegro	3'068 (2011)	0.60%	62 (2010)	0.1 (2010)
Morocco	8'660	0.03%	120 (2010)	
Mozambique	13'998	0.03%	5	
Myanmar	897	0.01%	15	
Namibia	23'086	0.06%	12	
Nepal	9'361	0.22%	687	
Netherlands	49'394	2.56%	1'646 (2012)	840
New Caledonia	PGS group (area data not available)		50	
New Zealand (2012)	106'753	0.93%	987	82
Nicaragua (2009)	33'621	0.65%	10'060	
Niger	106	0.0002%	1 (2012)	
Nigeria	250 (2012)	0.0003%	80 (2011)	
Niue (2012)	61	1.23%	122	
Norway	51'662	4.77%	2'452	224
Oman	38	0.002%	38	
Pakistan	22'397	0.09%	105	
Palestinian, State of(2010)	6'354	1.73%	832	
Panama	15'183	0.68%	1'300	
Papua New Guinea	20'939	1.82%	17'948	
Paraguay	62'274	0.30%	7'905	
Peru	388'448	1.81%	52'284	14 (2010)
Philippines	101'278	0.85%	3'008	
Poland (2012)	661'956	4.28%	25'944	120 (2011)
Portugal	271'532	8.10%	3'308	21 (2011)
Republic of Korea	21'210	1.14%	13'963	
Réunion (France)	595	1.49%	144	
Romania (2012)	288'261	2.06%	15'315	80 (2011)
Russian Federation	144'254	0.07%	70	120 (2012)
Rwanda (2011)	3'705	0.19%	876	
Samoa (2012)	33'515	11.84%	743	
San Marino	Processor only			
Sao Tome and Principe (2012)	4'051	7.23%	2'180	
Saudi Arabia	36'595	0.02%	79 (2012)	
Senegal	7'176	0.08%	18'393	
Serbia	8'228	0.16%	1'281	
Singapore	Processor only			

Annex: Table: Organic Agricultural Land, Producers, Domestic Sales

Country	Area [ha]	Share of all agr. land [%]	Producers	Retail sales [Mio €]
Slovakia (2011)	166'700	8.79%	365	4 (2010)
Slovenia	38'665	8.37%	3'049	49
Solomon Islands (2012)	1'307	1.56%	384	
South Africa	37'466	0.04%	250	
Spain	1'610'129	6.47%	30'502	998 (2012)
Sri Lanka	19'517	0.75%	404	
Sudan	141'479	0.10%	222	
Swaziland	3	0.0003%		
Sweden	500'996	16.34%	5'584	1'018
Switzerland	128'140	12.19%	6'308	1'668
Syrian Arab Republic (2010)	19'987	0.14%	2'458	
Taiwan	5'937	0.70%	2'988	
Tajikistan (2012)	12'659	0.27%	10'486	
Tanzania	186'537	0.53%	148'610	
Thailand	33'840	0.17%	9'279	51 (2009)
Timor-Leste	24'690	6.58%	72	
Togo	4'638	0.14%	9'428	
Tonga	398	1.28%	123	
Tunisia	139'087	1.38%	2'810	
Turkey	461'396	1.90%	65'042	4 (2009)
Uganda (2012)	231'157	1.66%	189'610	
Ukraine	393'400	0.95%	175	12
United Arab Emirates	4'150	0.73%	50	
United Kingdom	567'751	3.30%	3'918	2'065
United States of America	2'178'471 (2011)	0.64%	12'880 (2011)	24'347
Uruguay (2006)	930'965	6.29%	630	
Uzbekistan	213	0.001%		
Vanuatu	4'106	2.20%	696	
Venezuela	47	0.002%		
Viet Nam	37'490	0.36%	6'829	
Zambia	7'552	0.03%	10'055 (2009)	
Zimbabwe	374	0.002%	2'000	
Total	**43'091'113**	**0.98%**	**1'998'592**	**56'370**

Source: FiBL-IFOAM-survey 2015, based on data from governments, the private sector, and certifiers. European market data: OrganicDataNetwork - FiBL-AMI- survey 2015, based on data from government bodies, the private sector, and market research companies. For detailed data sources see annex, page 281.

Data Providers and Data Sources

Compiled by Julia Lernoud[1] and Helga Willer[2]

Afghanistan
Source
Certifier data.

Albania
Source
Source: Patrizia Pugliese, Marie Reine Bteich and Lina Al-Bitar (eds.) (2014): Mediterranean Organic Agriculture. Key Features, Recent Facts, Latest Figures. Report 2014. Mediterranean Organic Agriculture Network (MOAN), CIHEAM Bari, Valenzano
The data is from 2012.
Contact
Dr. Marie Reine Bteich CIHEAM - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Algeria
Source
Source: Mediterranean Organic Agriculture Network (MOAN)/IAMB, Bari, Italy
Contact
Dr. Marie Reine Bteich CIHEAM - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it
www.iamb.it
Note
No separate figure for the number of producers was available; the figure communicated here is that for all operators in the country.

Andorra
Source
Ecocert, 32600 L'Isle Jourdain, France
Contact
Emma Tsessue, Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com

Angola
Certifier data

Argentina
Source
Land use/operator/production data: SENASA, 2014 "Situación de la Producción Orgánica en la Argentina durante el año 2013". Buenos Aires. In addition, further data was provided by SENASA, www.senasa.gov.ar
Export data is from 2009.
Contact
Juan Carlos Ramirez and Diego Pinasco, SENASA, Buenos Aires, Argentina, www.senasa.gov.ar

Armenia
Source
Survey of Ecoglobe - Organic control and certification body, 375033 Yerevan, Republic of Armenia, www.ecoglobe.am.
Contact
Nune Darbinyan, Ecoglobe - Organic control and certification body, 375033 Yerevan, Republic of Armenia, www.ecoglobe.am.

Australia
Source
- Australian Organic (Ed) (2014): Australian Organic Market Report 2014. Research by Swinburne University of Technology, the Australian Bureau of Statistics and Mobium Group. Australian Organic, Nundah. Available from http://austorganic.com/wp-content/uploads/2014/11/AO_Report_2014_web.pdf
- For crop data: Biological Farmers of Australia, Chermside Brisbane, Australia. Australian Organic Market Report 2010

Contact
- Kathy Cogo, Communication manager, Australian Organic, Nundah, Australia, www.austorganic.com
- Andrew Monk, Chairman, Australian Organic, Nundah, Australia, www.austorganic.com

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Austria

Sources

- Data source for land area, land use and farms: Lebensministerium: Gruener Bericht. Lebensministerium, Wien, www.gruenerbericht.at
- Domestic market data and export data are from 2011 and were compiled by the Organic Retailers Association (ORA). Details on individual products are available from RollAMA/AMA-Marketing Marktentwicklung. Wert und Menge. RollAMA/AMA-Marketing, Vienna.

Contact

- Otto Hofer, Lebensministerium / Federal Ministry of Agriculture, Forestry, Environment and Water Management (AT), Vienna, Austria, www.lebensministerium.at
- Ralph Liebing, ORA ~ Organic Retailers Association, Vienna, Austria, www.o-r-a.org

Azerbaijan

Source

GABA Ganja Agribusiness Association, Ganja, Azerbaijan, www.gaba.az

Contact

Dr. Vugar Babayev; GABA Ganja Agribusiness Association, Ganja, Azerbaijan; www.gaba.az

Bahamas

Certifier data.

Bangladesh

Source

Horticulture Export Development Foundation, Dhaka, Bangladesh, www.hortex.org. For the crops some data from an international certifier were included. The data are from 2012.

Contact

Mitul Saha, Assistant General Manager, Horticulture Export Development Foundation, Dhaka, Bangladesh; www.hortex.org.

Belarus

Source

Certifier data (wild collection only).

Belgium

Source

- Samborski V., Van Bellegem L., Platteau J. (2014): de Biologische Landbouw in Vlaanderen. Departement Landbouw en Visserij. Brussel. Available at http://lv.vlaanderen.be/sites/default/files/attachments/De%20biologische%20landbouw%20in%202013.pdf

Contact

- Vincent Samborski, Landbouw en Visserij, Brussels, Belgium
- Paul Verbeke, BioForum Vlaanderen vzw, Antwerpen, www.bioforum.be

Belize

Source

- Survey among the certified companies in Belize by the Belize Organic Producers Organisation BOPA, Belmopan, Belize.

Contact

- Maximiliano Ortega, Belize Organic Producers Organisation BOPA, Belmopan, Belize

Benin

Source

FiBL Terrain, SYPROBIO-CRRA, Sikasso, République du Mali

Contact

- Laurent C. Glin, FiBL Terrain , SYPROBIO-CRRA, Sikasso, République du Mali

Bermuda

Certifier data.

Bhutan

Source

Ministry of Agriculture (MOA), National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt

Contact

Kesang Tshomo, Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt.

Bolivia

Source

GIZ survey based on the data from Bolicert, BioLatina, Ceres, IMO-Control, Camara de Exportadores de La Paz and Bolivian Association of Organic Producers

Organisations – AOPEB. No new data were received for 2012 and 2013.

Bosnia Herzegovina

Source

- Organska Kontrola, Sarajevo, Bosnia & Herzegovina

Contact

- Bernisa Klepo, Organska Kontrola, Sarajevo, Bosnia & Herzegovina
- Aleksandra Nikolic, University of Sarajevo, Bosnia & Herzegovina

Brazil

Sources

- Area and operators: COAGRE/DEPROS/SDC/MAPA (2013): Dados da agricultura orgânica oficialmente regulamentada no Brasil. Ministério da Agricultura, Pecuária e Abastecimento.
  The wild collection data are from 2011.
- Export and domestic market data Organics Brasil, Brazil quoted by Karin Heinze (2014): Brazil: dynamic growth of the domestic market and exports. The Organic-Market.info website

Contacts

- Angela Pernas Escosteguy, Instituto do Bem-Estar, Porto Alegre, Brazil
- Ming Liu, Organic Brasil, Brazil

Bulgaria

Sources

- Land area, operators: Ministry of Agriculture, Sofia, Bulgaria
- Domestic market data (from 2010): Bioselena, Karlovo, Bulgaria. www.bioselena.com

Contact

Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Burkina Faso

Sources

- The data were compiled by FiBL based on the data of the following international certifiers.
- BCS, Nürnberg, Germany, www.bcs-oeko.deControl Union, Zwolle, The Netherlands, www.controlunion.org
- CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
- Ecocert West Africa, Ougadougou, Burkina Faso
- LACON GmbH, Brünnlesweg 19, 77654 Offenburg, Germany, www.lacon-institut.com

Not all certifiers provided updated data.

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de;Emmeline Foubert, CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
- Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso

Burundi

Source

Ecocert East Africa, Madagascar. The data are from 2011.

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com.

Cambodia

Source

Cambodian Organic Agriculture Association (COrAA), Khan Chamkar Morn, Phnom Penh, Cambodia, www.coraa.org. The data are based on a survey among the organic certifiers in the country.

Contact

- Winfried Scheewe, Cambodian Center for Study and Development in Agriculture (CEDAC), Toul Kok Phnom Penh, Cambodia, http://www.cedac.org.kh

Cameroon

Source

The data were compiled by FiBL and IFOAM based on the data of the following international certifiers:

- Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com Ecocert, BP 47, 32600 L'Isle Jourdain, France, www.ecocert.com.
- Institute for Marketecology (IMO), 8570 Weinfelden, Switzerland, www.imo.ch
- Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification

› Not all certifiers provided updated data for 2013

Contact

› Andrew Bayliss, Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification
› Loni Hensler, Institute for Marketecology (IMO), 8570 Weinfelden, Switzerland, www.imo.ch
› Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Canada

Source

Land area, producers and other operator types: Survey of the Canada Organic Trade Association (COTA), Ottawa, Canada, based on information of the certifiers.
Market data Canada Organic Trade Association (COTA), Ottawa, Canada

Contact

› Matthew Holmes, Executive Director, Canada Organic Trade Association (COTA), Ottawa, Canada, http://ota.com/otacanada.html
› Anne Macey, Canadian Organic Growers (COG), Ottawa, Ontario K1N 7Z2, Canada, www.cog.ca.
› Marie-Eve Levert, Canada Organic Trade Association (COTA), Ottawa, Canada

Note

See also article about organic farming in Canada in this and in previous editions of "The World of Organic Agriculture."

Chad

Source

Ecocert West Africa, Ougadougou, Burkina Faso. The data are from 2012. Wild collection only.

Contact

Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso

Channel Islands

Source

FAOSTAT (2014) Organic area data Channel Islands. The FAOSTAT website, FAOSTAT, Rome, Italy, FAOSTAT > Resources > Land. Download of December 12, 2014 http://faostat.fao.org/site/377/DesktopDefault.aspx?PageID=377#ancor
The data is from 2012.

Chile

Source

› Certified areas, producers/ smallholders, livestock : Servicio Agrícola y Ganadero (SAG) Santiago, Chile, www.sag.gob.cl.
› Organic export value: Servicio Nacional de Aduanas, Santiago, Chile
› Domestic market data (2009) according to USDA: Organic Products Report Chile. GAIN Report Number CI0031. November 30, 2010

Contact

Pilar M. Eguillor Recabarren, Oficina de Estudios y Políticas Agrarias (ODEPA), Ministerio de Agricultura, Teatinos 40, Santiago, Chile, www.odepa.gob.cl.

China

Sources

Land area, market and export data; Zhongguo Youji Chanye and Fazhan Baogao (2014) White Book of the China Organic Sector, CNCA, Beijing, China.
According to the report, the total certified organic acreage in 2013 was 2.1 million hectares, with 1.3 million hectares certified to the Chinese Organic Standard for the domestic market and 0.8 million hectares certified by foreign certification bodies of organic standards for export markets.

Contact

› Dr. Wang Maohua, Certification and Accreditation Administration of the People's Republic of China CNCA
› Yuhui Qiao, Chinese Agricultural University, Beijing, China
› Zejiang Zhou, Vicepresident, Board of IFOAM Asia, IFOAM World Board, China

Colombia

Source

› ECONEXOS, Conexion Ecologica, Calle 5 No. 45A-125, Cali, Colombia, info@econexos.org, www.econexos.com, based on a survey among the certifiers.

Contact

› Carlos Escobar, ECONEXOS - Desarrollo en

Movimiento, Cali República de Colombia, www.econexos.com.

Comoros

Source

Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com. The data is from 2011.

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com.

Congo, Democratic Republic of

Source

Certifier data. The area data is from 2012, the producer data from 2008.

Cook Islands

Source

Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. The data is from 2012.

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva Fiji, www.spc.int

Costa Rica

Source

- Land area, operators and export volume data: Servicio Fitosanitario del Estado (2014): Programas Especiales/ Agricultura Orgánica. Estadísticas 2013. M.A.G Costa Rica, San José.
- Export value (2009 data) PROMOCER (2011): Costa Rica: exportaciones de productos orgánicos según destino.
- Domestic market data (2008) were provided by the organic sector organization MAOCO.

Contact

Roberto Azofeifa, Ministerio de Agricultura y Ganadería, 10094-1000 San José, Costa Rica.

Côte d'Ivoire

The data were compiled by FiBL based on the data of the following international certifiers.

Sources

- BCS, Nürnberg, Germany, www.bcs-oeko.de
- Control Union, Zwolle, The Netherlands, www.controlunion.org
- Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com
- Not all certifiers provided updated data.

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de;
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Croatia

Sources

- Area and operators: The data were provided via the Mediterranean Organic Agriculture Network (MOAN), c/o IAM Bari, by the Ministry of Agriculture, Fisheries and Rural Development, Zagreb, Croatia, www.mps.hr.
- Market& trade data: Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia. The data is from 2012.-

Contact

- Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.
- Darija Musulin, Ministry of Agriculture, Zagreb, Croatia, www.mps.hr
- Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Cuba

Certifier data.

Cyprus

Source

Land area and producer data: Eurostat, Luxembourg
Market data (from 2006): Organic Retailers Association, Ecozept and Biovista (eds.) (2008): Specialised Organic Retail Report 2008. Freising and Vienna 2008

Czech Republic

Source

Institute of Agricultural Economics and Information (UZEI), Department of Agri-environmental Policy, 602 00 Brno, Czech Republic

The market and international trade data are from 2012.

Contact

- Hana Šejnohová, Institute of Agricultural Economics and Information (UZEI), Department of Agri-environmental Policy, 602 00 Brno, Czech Republic
- Andrea Hrabalova, Institute of Agricultural Economics and Information (UZEI), 602 00 Brno, Czech Republic

Denmark

Sources

- Land area, land use, Operators: Ministeriet for Fødevarer, Landbrug og Fiskeri NaturErhvervstyrelsen , 1780 København V. www.naturerhverv.dk
- Domestic sales: Source: Landbrug & Fødevarer. Based on data from statistics Denmark and Organic Denmark.
- Exports, imports: Statistics Denmark.
- Other marketing channels: Organic Denmark. Data compiled by Danish Agriculture & Food Council, Agro Food Park 15, 8200 Aarhus.

Contact

- Carmen I. Calverley. Ministeriet for Fødevarer, Landbrug og Fiskeri NaturErhvervstyrelsen , Nyropsgade 30, 1780 København V. www.naturerhverv.dk
- Ejvind Pedersen, Danish Agriculture & Food Council, Agro Food Park 13, 8200 Aarhus N, Denmark.

Dominica

Source

Division of Agriculture, provided by Dominica Organic Agriculture Movement (DOAM) Inc., PO Box 1953 - Roseau, Commonwealth of Dominica. The data is from 2011.

Contact

Ms. Aikuali Joseph, Dominica Organic Agriculture Movement (DOAM) Inc., Roseau, Commonwealth of Dominica.

Dominican Republic

Source

Secretaria de Estado de Agricultura, Oficina de Control Orgánico, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Contact

José A. Zapata G., Secretaria de Estado de Agricultura, Oficina de Control Orgánico, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Ecuador

Source

Land area, operators, exports: Agrocalidad, Quito Ecuador, www.agrocalidad.gob.ec. The aquaculture data are from 2012.

Contact

- Christian Báez, Agrocalidad, Quito, Ecuador
- Paulina Betancourt, Agrocalidad, Quito, Ecuador

Egypt

Source

Mediterranean Organic Agriculture Network MOAN, c/o IAMB Bari. The data is from 2012.

Contact

Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Note

For Egypt only a figure for the total operators is available for 2009, this figure is listed under “producers”.

El Salvador

Source

Ministerio de Agricultura y Ganadería, Final 1a. Avenida Norte, 13 Calle Poniente y Avenida Manuel, Gallardo, Santa Tecla, El Salvador. Data is from 2008.

Estonia

Sources

- Land area, land use, operators: Ministry of Agriculture of Estonia as published in: Vetemaa, Airi and Merit Mikk (Eds.) (2014): Organic Farming in Estonia 2013. Compiled by the Estonian Organic Farming Foundation. Ministry of Agriculture, Republic of Estonia, Tallinn. http://orgprints.org/27330/
- Market data (2012) were provided by the Merit Mikk, Centre of Ecological Engineering, Tartu, Estonia

Contact
Merit Mikk, Centre of Ecological Engineering, Tartu, Estonia

Ethiopia
Source
Ethiopian Institute of Agricultural Research, Akaki, Ethiopia. The data is from 2012 (export data from 2010).
The 2013 were received after the data for this publication were processed. The key data for 2013 are:
- Total organic agricultural land: 164'094 hectares;
- Producers: 135'827;
- Exports: 191 million US dollars.

Contact
Addisu Alemayeh, Ethiopian Institute of Agricultural Research, Akaki, Ethiopia

Falkland Islands
Source
Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk.

Contact
Lucy Ellis, Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk

Faroe Islands
Source
Vottunarstofan Tún ehf, Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact
- Gunnar Gunnarsson, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is
- Rannveig Guðleifsdóttir, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is

Fiji Islands

Sources
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, data from one international certifier was added.

Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom).

Finland
Sources
- Land area and operators: Finnish Food Safety Authority Evira, Helsinki, Finland
- Wild collection: Centre for Economic Development, Transport and the Environment: Lapland;
- Market data: Pro Luomo, Kauniainen, Finland; for total market value: Finnish Grocery Trade Associations

Contact
- Marja-Riitta Kottila, Pro Luomu, Kauniainen, Finland
- Sampsa Heinonen, Evira, Helsinki, Finland

France
Source
- Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org
- Retail sales: ANDi / Agence Bio, Montreuil-sur-Bois, France

Contact
- Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

French Guyana
Source
Agence BIO: The Agence Bio website, Agence Bio, 93100 Montreuil sous Bois, France. Available at http://www.agencebio.org/la-bio-dans-les-regions

Contact
Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

French Polynesia
Sources
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, data from 2 international certifiers were added. Not all sources had updated data.

Contact
Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom)

Gambia
Data for Gambia have not been supplied since 2007 by any of the certification bodies. IFOAM and FiBL therefore concluded that there is currently no certified organic production in the country. Any information on certified organic

farming in Gambia should be sent to Julia Lernoud or Helga Willer at julia.lernoud@fibl.org and helga.willer@fibl.org.

Georgia

Source

Elkana Survey, Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge. The data is from 2011.

Contact

Elene Shatberashvili, Biological Farming Association Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge

Germany

Sources

- Agrarmarkt Informations-Gesellschaft mbH (AMI), Bonn, Germany, www.ami-informiert.de;

Contact

- Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH (AMI), Bonn, Germany, www.ami-informiert.de

Ghana

Source

The data was compiled by FiBL based on the data of the following international certifiers.

- BCS, Nürnberg, Germany, www.bcs-oeko.de;
- CERTISYS, Brussels, www.certisys.eu
- Control Union, Zwolle, The Netherlands, www.controlunion.org
- Ecocert West Africa, Ougadougou, Burkina Faso
- IMO, Weinfelden, Switzerland, www.imo.ch
  Not all certifiers provided updated data.

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de
- Emmeline Foubert, CERTISYS, Brussels, Belgium
- Loni Hensler, IMO, Weinfelden, Switzerland
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Note

A direct year-to-year comparison over the past ten years is not possible, because data from more certifiers were available than previously. From 2009 to 2013, the sources have remained the same, but not all certifiers provided updates every year.

Greece

Sources

- Land area and operators: Ministry of Agriculture, Greece
- Market data (from 2010) were provided by Nicoletta van der Smissen, Feres, Greece

Contact

- Nicoletta van der Smissen, Feres, Greece

Grenada

Data from one international certifier (data from 2010).

Guadeloupe

Source

Agence BIO: The Agence Bio homepage 93100 Montreuil sous Bois, France. Available at http://www.agencebio.org/la-bio-dans-les-regions

Contact

Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Guatemala

Source

Department of Organic Agriculture, Ministerio de Agricultura, Ganaderia y Alimentación (MAGA), Ciudad de Guatemala, Guatemala C.A. 01013, http://www2.maga.gob.gt. The data is from 2011.

Guinea Bissau

Certifier data.

Guyana

Source

Ecocert Colombia, Bogota D.C., Colombia. Data on wild collection only.

Contact

Wenndy Johana Ramírez F., Ecocert Colombia, Bogota D.C., Colombia

Haiti

Source

Ecocert Colombia, Bogota D.C., Colombia.

Contact
- Richard Escobar, Henao, Bogota D.C, Colombia
- Marcela Machuca Henao, Bogota D.C, Colombia

Honduras
Source
Agricultura Orgánica Honduras, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras, SENASA Honduras.
The area data is from 2012 and the operator data is from 2011.
Contact
Ing. Sandra Elvir, Jefe del Departamento de Agricultura Organica, Honduras

Hungary
Sources
- Land area and operators: National Food Chain Safety Office, Budapest, Hungary, www.nebih.gov.hu
- Market and trade data (from 2009): Survey of Biokorsar, Budapest, Hungary

Contact
- Agnes Juhasz, National Food Chain Safety Office, Budapest, Hungary, www.nebih.gov.hu
- Dora Drexler, ÖMKI, Budapest, Hungary, www.biokutats.hu

Iceland
Source
Vottunarstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.
Contact
Gunnar Gunnarsson, Vottunarstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is
Rannveig Guðleifsdóttir, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is

India
Source
- Land area, operators, exports: Agricultural and Processed Food Products Export Development (APEDA) Ministry of Commerce & Industry, Government of India, New Delhi - 110 016, India, www.apeda.com.
- Market data were provided by Manoj Kumar Menon of the International Competence Centre of Organic Agriculture ICCOA, Bangalore

Contact
- Dr. P.V.S.M. Gouri, Agricultural and Processed Food Products Export Development (APEDA), New Delhi, India, www.apeda.com
- Manoj Kumar Menon, International Competence Centre for Organic Agriculture ICCOA, Bangalore, India

Indonesia
Source
Indonesian Organic Alliance, Bangor, Indonesia (www.organicindonesia.org). Survey among the certifiers active in the country.
Contact
Lidya Ariesusanty, Indonesia Organic Alliance, Indonesia, www.organicindonesia.org

Iran
Source
Environmental Sciences Research Institute, Shahid Beheshti University ESRI, Evin, Tehran, Iran. The information is based on the data of the certifiers active in the country.
Contact
Hossein Mahmoudi, Environmental Sciences Research Institute, Shahid Beheshti University ESRI

Iraq
Data for Ira were received for the first time.
Source
Zakho Small Villages Projects (ZSVP), Dohuk City, Dohuk, Iraq
Contact
Dr. Abid Ali Hasan, Zakho Small Villages Projects (ZSVP), Program Coordinator in Iraq, Dohuk City, Dohuk, Iraq

Ireland
Source
- Area, operators and livestock data: Eurostat. The data is from 2012.
- Market data: Bord Bia, Dublin, Ireland, based on Data of Kantar. The data is from 2011.

Contact
- Philipp Cullen, Department of Agriculture Fisheries and Food, Johnstown Castle Estate, Co. Wexford, Ireland www.agriculture.gov.ie.

› Lorcan Burke and Rosaleen O'Shaughnessy, Bord Bia, Dublin, Ireland

Israel

Source

Source for all data: Standardization and Accreditation Department Ministry of Agriculture and Rural Development Plant Protection and Inspection Services (PPIS), Israel, www.ppiseng.moag.gov.il/ppiseng/ISRAEL. .The data are published in the "Annual Report: Export of Fresh and Processed products to the European Union"

Contact

Mirit Amrani, Head Standardization and Accreditation Department, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Note

The data cover only the products exported to the European Union.

Italy

Sources

› Operator, primary crops, livestock products, imports: SINAB Italian Information System on Organic Farming, Rome, Italy
› Domestic market (totals), ASSOBIO, Padova, Italy
› Share of all retail sales: Nomisma, Bologna, Italy

Contact

› Roberto Pinton, ASSOBIO, 35121 Padova, Italy
› Marta Romeo, SINAB Italian Information System on Organic Farming, Rome, Italy
› Francesco Solfanelli, Università Politecnica Marche, Ancona, Italy
› Silvia Zucconi, Nomisma, Bologna, Italy

Jamaica

Source

Jamaica Organic Movement JOAM, P.O. Box 5728, Kingston 6, Jamaica, www.joamltd.org. The data is from 2009.

Contact

Trevor Brown, Jamaica Organic Movement JOAM, www.joamltd.org

Japan

Source

Primary production, producer, export and import data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo 100 - 8950, Japan, www.maff.go.jp/e/index.html. The area and producer data are from 2012 Domestic market data (from 2009): Heinz Kuhlmann, ABC Enterprises, Tokio, Japan

Contact

› Yu Watanabe , IFOAM Japan, Tokyo, Japan
› Heinz Kuhlmann, ABC Enterprises, Tokio, Japan

Jordan

Source

Mediterranean Organic Agriculture Network (MOAN), maintained by IAM Bari

Contact

› Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Kazakhstan

Source

The data were compiled by the Organic Centre of Kazakhstan (www.organiccenter.kz); a survey among the certifiers was carried out. The data is from 2012.

Contact

Evgeniy Klimov, Director of the Organic Centre of Kazakhstan and director of the Foundation for Integration of Ecological Culture, 40, Almaty, Kazakhstan, www.organiccenter.kz

Kenya

Source

Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke. The data are collected among the organic operators in the country and cover most of the country's organic land/producers. The data is from 2012.

Contact

Jack Juma, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke

Korea, Republic of

Source

National Agricultural Products Quality Management Service, Korea (for area, production, imports) and Korea Rural Economic Institute for market volume.

Contact

- Jennifer Chang, Korean Federation of Organic Agriculture Organisations (KFSA), Republic of Korea
- Man Chul Jung, Korean Federation of Organic Agriculture Organisations (KFSA), Republic of Korea

Kosovo

Source

Initiative for agricultural development of Kosovo (IADK), Mitrovica, Republic of Kosovo

Contact

Basri Hyseni, Initiative for agricultural development of Kosovo (IADK), Mitrovica, Republic of Kosovo

Kyrgyzstan

Source

Agricultural Commodity and Service Cooperative "Bio Farmer", Kyrgyzstan

Contact

Gulzaada Aleshova, Helvetas, Jalalabad, Kyrgyzstan

Lao People's Democratic Republic

Source

- Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos

Contact

- Thavisith Bounyasouk, Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos

Latvia

Source

- Area and Operators: Ministry of Agriculture of Republic of Latvia, Riga, Latvia
- Market data (from 2011): Ekoconnect, Dresden, Germany and AMI, Bonn, Germany

Contact

- Livija Zarina, State Priekuli Plant Breeding Institute SPPBI, Priekuli, Cesis distr, Latvia

Lebanon

Source

Mediterranean Organic Agriculture Network (MOAN), maintained by IAM Bari.

Contact

- Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Lesotho

Certifier data

Liechtenstein

Source

Klaus Büchel Anstalt, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.

Contact

Data were provided by Klaus Büchel, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.

Lithuania

Source

- Land area, production volume, operators: Lithuanian Institute of Agri Economics, Vilnius, Lithuania
- International trade data: Agricultural & Food Market Information System, 03105 Vilnius, Lithuania, www.vic.lt.
- Domestic Market data (from 2011): Ekoconnect, Dresden, Germany and AMI, Bonn, Germany

Contact

Virgilijus Skulskis, Lithuanian Institute of Agri Economics, Vilnius, Lithuania

Luxembourg

Source

- Land area and operator data: Administration des Services Techniques de l'Agriculture ASTA, Luxembourg. Land use data are from 2009
- Market data : Biogros Estimate, 13 Parc d'Activité Syrdall, L-5365 Munsbach, www.biogros.lu/de/home/

Contact

- Nadine Kieffer, Administration des Services Techniques de l'Agriculture (ASTA), 1019 Luxembourg, www.asta.etat.lu.
- Aender Schanck, Biogros, 13 Parc d'Activité Syrdall, L-5365 Munsbach, www.biogros.lu/de/home/

› Raymond Aendekerk, IBLA, 13, rue Gabriel Lippmann, Parc d'activité Syrdall, L-5365 Munsbach, www.biolabel.lu

Macedonia, the Former Yugoslav Republic

Source

Ministry of Agriculture, Forestry and Water economy, Skopje, provided by Mediterranean Organic Agriculture Network (MOAN)

Contact

› Olivera Bicikliski, Ministry of Agriculture, Forestry and Water Management, Skopje, Former Yugoslav Republic of Macedonia
› Marie Reine Bteich, Mediterranean Organic Agriculture Network (MOAN), c/o IAM Bari, Italy

Madagascar

Sources

› Australian Certified Organic, Nundah, Australia, www.aco.net.au Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com (2011 data)
› LACON GmbH, Brünnlesweg 19, 77654 Offenburg, Germany, www.lacon-institut.com

Contact

› Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com
› Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Malawi

Source

Ecocert Southern Africa, Gardens, Cape Town, South Africa, http://www.ecocert.com/

Contact

Cliflyn McKenzie, Ecocert Southern Africa, Gardens, Cape Town, South Africa, http://www.ecocert.com/

Malaysia

Source

Department of Agriculture, Malaysia

Contact

Data provided by Ong Kung Wai, Humus Consultancy, Penang, Malaysia

Mali

FiBL Terrain, SYPROBIO-CRRA, Sikasso, République du Mali

Contact

› Laurent C. Glin, FiBL Terrain, SYPROBIO-CRRA, Sikasso, République du Mali

Malta

Source

› Total land area and operators (2012): Eurostat: the Eurostat homepage, Eurostat, Luxemburg
› Land use data from are from 2011 and were provided by the Mediterranean Organic Network MOAN, c/o IAM Bari, Italy

Contact

Marie Reine Bteich, Mediterranean Organic Network MOAN, c/o IAM Bari, Italy

Martinique (France)

Source

Agence BIO: The Agence Bio, Montreuil sous Bois, France. Available at: http://www.agencebio.org/la-bio-dans-les-regions

Contact

Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Mauritius

Source

Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com. The data are from 2011.

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com

Mayotte (France)

Source

Agence BIO: The Agence Bio, Montreuil sous Bois, France. Available at: http://www.agencebio.org/la-bio-dans-les-regions

Contact

Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Mexico

Source

Universidad Autónoma Chapingo, based on data of the certifiers

Contact
Rita Schwentesius, Universidad Autónoma Chapingo, Carretera México - Texcoco Km. 38.5. Chapingo, México

Moldova
Source
Moldovan Investment and Export Promotion Organisation Report "Organic Agriculture in Moldova: Local and Regional Perspectives". 2012. The data is from 2011.

Mongolia
Source

Ecocert China, Beijing 100193, China
Contact
Weimin Yu, Ecocert China, Beijing 100193, China

Montenegro
Source
- Area data (from 2011): Monteorganica, Podgorica, Montenegro.
- Operator data (from 2010): Ministry of Agriculture, Forestry and Water Management, Podgorica, Montenegro.
- Market data (from 2010): Ecozept - Market research and marketing consulting agency. Freising, Germany

Contact
Prof. Dr. Natasa Mirecki, Biotechnical Faculty, University of Montenegro, Mihaila Lalica, 81000 Podgorica, Montenegro, www.btf.ac.me/en/

Morocco
Source
Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco, http://www.agriculture.gov.ma and Mediterranean Organic Agriculture Network MOAN, C.I.H.E.A.M., c/o Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.
Contact
Allal Chibane, Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco, http://www.agriculture.gov.ma;
Dr. Marie Reine Bteich, C.I.H.E.A.M. Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.
Note on producer data
No separate figure for the number of producers was available; the figure communicated is that for all operators in the country (2010 data).

Mozambique
Sources
Certifier data.

Myanmar
Source
Myanmar Organic Agriculture Group, Yangon, Myanmar. To the data of the Myanmar Organic Agriculture Group (from 2011), the data of one international certifier were added.
Contact
San Linn, Myanmar Organic Agriculture Group, Yangon, Myanmar

Namibia
Source
To the data provided by the Namibian Organic Association, PO Box 1504, Okahandja, Namibia. PGS figures are included.
Contact
Manjo Smith, Namibian Organic Association (NOA), PO Box 1504, Okahandja, Namibia

Nepal
Source
The data were provided by Maheswar Ghimire, Kathmandu, Nepal.
Contact
Maheswar Ghimire, Kathmandu, Nepal

Netherlands
Sources
- Land area: Centraal Bureau voor de Statistiek, 2490 HA Den Haag, Netherlands (Data 2013).
- Operator data (from 2012): Eurostat

Market data: Bionext, Zeist; the Bionext website, available at http://www.bionext.nl/zakelijk/feiten-cijfers
- International trade data: Bionext, Zeist

Contact
- Marian Blom, Bionext, Utrecht, The Netherlands

New Caledonia
Source
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int;

Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

New Zealand
Source
The AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com. The data is from 2012.
Contact
Jon Manhire, the AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com

Nicaragua
The data are from 2009.
Source
Ministerio Agropecuario y Forestal MAGFOR, Managua. Nicaragua, www.magfor.gob.ni
Contact
Mauricio Carcache Vega, MAGFOR, Manuagua, Nicaragua

Niger
Data source: Certifier data. Not all certifiers provided updated data for 2013.

Nigeria
Source
The data were compiled by FiBL and IFOAM based on the data of one international certifier and the University of Ibadan, Ibadan, Nigeria. One certifier who had been active in Nigeria in the past reported that they are not working in the country anymore, which explains the big drop of organic agricultural land.
Contact
Olugbenga O. AdeOluwa, University of Ibadan, Nigeria

Niue
Source
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. The data is from 2012.
Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Norway
Sources
Norwegian Agricultural Authority SLF, Oslo, Norway
Contact
Trine Thanh Ha, Statens landbruksforvaltning (SLF), Oslo, Norway

Oman
Source
Organic Plant Production and Agroeceosystems Research in the Tropics and Subtropics, Kassel University, Witzenhausen, Germany, www.uni-kassel.de/agrar/?language=en.
Contact
Prof. Dr. Andreas Bürkert, Organic Plant Production and Agroeceosystems Research in the Tropics and Subtropics Kassel University, Witzenhausen, Germany, www.uni-kassel.de/agrar/?language=en.

Pakistan
Data was provided by one international certifier. The number of producers provided in the tables is in fact the number of clients, to each of which a number of producers might be associated.

Palestine, State of
Source
Mediterranean Organic Agriculture Network MOAN, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it. The data are from 2010.
Contact
Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.
Note
There was no separate figure for the number of producers; the number presented here refers to all organic operators in the country.

Panamá
Source
Ministerio de Desarrollo Agropecuario, Dirección Nacional de Sanidad Vegetal, Panama, www.mida.gob.pa
Contact
Fermín Romero, Dirección Nacional de Sanidad Vegetal, Ministerio de Desarrollo Agropecuario, Panama, http://www.mida.gob.pa

Papua New Guinea

Source

Certifier data and Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Paraguay

Source

Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas, Department of Organic Agriculture, Asuncion, Paraguay, www.senave.gov.py

Contact

Genaro Coronel, Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas, Department of Organic Agriculture, Asuncion, Paraguay, www.senave.gov.py

Perú

Source

- Area and number of producers: SENASA. Producción Orgánica. Lima, Perú
- Market and Trade data: PromPeru, San Isidro - Lima 27 Perú, www.promperu.gob.pe. The total value of domestic market is an estimate, based the data from Promperu that the domestic market is between 13.1 and 23.2 million US dollars (2010).

Contact

Dr. Jorge Leonardo Jave Nakayo, Director de Producción Orgánica, Ministerio de Agricultura, SENASA, Peru

Philippines

Sources

The data were compiled by FiBL from a number of certifiers, but there are more certifiers active than those listed below. A direct year-to-year comparison over the years is not possible. Not all certifiers provided updated data.

Certifiers who provided data

- BCS, Nürnberg, Germany, www.bcs-oeko.de;
- Ceres, Happburg, Germany, www.ceres-cert.com;
- Control Union, Zwolle, The Netherlands, www.controlunion.org;
- Ecocert, L'Isle Jourdain, France, www.ecocert.com;
- Organic Certification Center of the Philippines OCCP (2009 data), Barangay Laging Handa, Quezon City, Philippines, www.occpphils.org.

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org;
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de;
- Simone Groh, Ceres, Happburg, Germany, www.ceres-cert.com;
- Lani Katimbang-Limpin, OCCP, Quezon City, Philippines, www.occpphils.org
- Camille Godard, Area Manager, Ecocert, L'Isle Jourdain, France, www.ecocert.com;

Note

Not all certifiers provided data on the number of producers, which therefore must be higher than communicated here.

Poland

Source

- Land area and land use, livestock and production (from 2012): Eurostat, the Eurostat Website
- Market data (from 2011): Andrzej Szeremeta, based on national data sources

Portugal

Source

- Total organic land and Operators: Mediterranean Organic Agriculture Network (MOAN), c/o IAM Bari, Italy
- Land use and operators (2011): Ministério da Agricultura, do Desenvolvimento Rural e das Pescas
- Market data: INTERBIO (2011), http://www.interbio.pt

Contact

- Marie Reine Bteich, Mediterranean Agronomic Institute of Bari (IAMB), Valenzano, Italy

Réunion

Source

Agence BIO, Montreuil sous Bois, France. Available at http://www.agencebio.org/la-bio-dans-les-regions

Contact
Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Romania
Sources
- Organic area; land use, livestock and production (from 2012): Eurostat, the Eurostat Website
- Wild collection (from 2012): Ministry of Agriculture MADR, Bucharest, Romania, see http://www.madr.ro/ro/agricultura-ecologica/dinamica-operatorilor-si-a-suprafetelor-in-agricultura-ecologica.html.
- Market data (from 2011): BCG-Global Advisors (2013) Romanian Organic Sector – Business Insight Booklet. Global Advisors, Bio-Romania Association, University of Bucharest. Bucharest 2012

Contact
- Iulia Grosulescu, Counsellor Organic Farming Office, Ministry of Agriculture and Rural Development, 24,Blvd Carol I, Bucharest Romania
- Marian Cioceanu, Asociatia Bio Romania, Str.Mihai Eminescu, Bucureşti, Romania, http://www.bio-romania.org/contact/

Russia
Source
Survey among the certifiers active in the country, carried out by Eco-control Ltd., 141506 Solnechnogorsk, Russia, www.eco-control.ru. Not all certifiers provided updated data.

Contact
Dr. Andrey Khodus, Eco-control Ltd., 141506 Solnechnogorsk, Russia, www.eco-control.ru

Rwanda
Source
Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com. The data are from 2011.

Contact
Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com.

Samoa
Source
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. The data is from 2012.

Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

San Marino
Certifier data

Sao Tome and Prince
Source
Ecocert West Africa, Ougadougou, Burkina Faso. The data is from 2012.

Contact
Data provided by Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Saudi Arabia
Source
GIZ Organic Farming Project, Riyadh, Saudi Arabia

Contact
Felix Ruhland, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), Riyadh, Saudi Arabia, www.giz.de

Senegal
Source
To the data provided by the National Federation for Organic Agriculture, AGRECOL BP. 347 Thiès, Sénégal, data from international certifiers were added.

Contact
Famara Diedhioe, National Federation for Organic Agriculture, AGRECOL, BP. 347 Thiès, Sénégal

Serbia
Source
Ministry of Agriculture, Forestry and Water, Belgrade, Republic of Serbia

Contact
- Jelena Milic, Ministry of Agriculture, Forestry and Water, Belgrade, Republic of Serbia
- Marie Reine Bteich, Mediterranean Agronomic Institute of Bari (IAMB), Valenzano, Italy
- Marija Kalentic German International Cooperation GIZ. Novi Sad, Serbia

Sierra Leone

Data had been available previously from one international certifier, but the projects are not involved in organic farming any longer.

Singapore

Two international certifiers reported a number of processors.

Slovakia

Sources

Area/operators/livestock/crop production: Eurostat, the Eurostat Website.
Market data (2010): Ecozept, market research and marketing consulting agency. Freising, Germany.

Slovenia

Sources

- Area, operators, livestock, crop production: Ministrstvo za kmetijstvo, gozdarstvo in prehrano-Ministry of Agriculture, Forestry and Food, SI–1000 Ljubljana, Slovenia, www.mkgp.gov.si .
- Market data: Institute for Sustainable Development, Ljubljana, Slovenia

Contact

Anamarija Slabe, Institute for Sustainable Development, Ljubljana, Ljubljana, Slovenia

Solomon Islands

Source

Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. The data is from 2012.

Contact

Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Somalia

No data were reported for Somalia.

South Africa

Source

The data were compiled by FiBL and IFOAM based on the data of the following international certifiers.

- Afrisco, Afrisco, Lynnwood Ridge, South Africa, www.afrisco.net
- BCS, Nürnberg, Germany
- Control Union, Zwolle, The Netherlands, www.controlunion.org
- Ecocert Southern Africa, Gardens Cape Town, www.ecocert.com
- IMO, Weinfelden, Switzerland, www.imo.ch
- Soil Association, Bristol, UK

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherland
- Andrew Bayliss, Soil Association, Bristol, UK
- Diana Callear, Afrisco, Lynnwood Ridge, South Africa, www.afrisco.net
- Tobias Fischer, BCS, Nürnberg, Source, BCS
- Loni Hensler, IMO, Weinfelden, Switzerland
- Clifyn Mckenzie, Ecocert Southern Africa, Gardens Cape Town
- Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Spain

Sources

- Area and land use, operators: Ministerio de Agricultura, Alimentación y Medio Ambiente (2014): Agricultura ecologica-estadisticas 2013. MAGRAMA, Madrid, Spain
- Market and international trade data (from 2012): Ministerio de Agricultura, Alimentación y Medio Ambiente (2013): Caracterizacction del sector de la produccion ecologica. MAGRAMA, Madrid 2013

Contact

- Gonzálvez Pérez, Victor, Spanish Society of Organic Agriculture SEAE, Catarroja (Valencia), Spain, www.agroecologia.net
- Joan Picazos, Biocop Productos Biológicos, S.A. (BIOCOP), Lliçà de vall (Barcelona), Spain, www.biocop.es

Sri Lanka

The data were compiled by FiBL from two international certifiers. Only one of the certifiers provided data on the number of producers, whereas the other only provided the number of operators. The number of producers must therefore be higher than communicated in this book.

Sudan (former)

Sources

Federal Ministry of Agriculture & Irrigation Export Development& Quality Control

Unit, Republic of the Sudan. To these the data of three international certifiers were added.

Contact
Afaf Abdelrahim Elgzouly, Federal Ministry of Agriculture & Irrigation Export Development& Quality Control Unit, Sudan

Suriname
The certifier, who had provided data previously, ceased its activities in 2012. .

Swaziland
Data source: Certifier data.

Sweden
Sources
- Area, livestock and operators, Jordbruksverket, Jönköping, Sweden, www.jordbruksverket.se.
- Market data: Statistics Sweden SCB, Orebro, Sweden

Contact
- Carla Larsson, Statistics Sweden SCB, Orebro, Sweden
- Göran Ekbladh, Jordbruksverket, Jönköping, Sweden, www.jordbruksverket.se.
- Kristina Ottosson, Jordbruksverket, Jönköping, Sweden, www.jordbruksverket.se

Switzerland
Sources
- Land area and crop data: Federal Agency for Statistics (BfS), Neufchatel, Switzerland. Please note that compared with previous years the data source has changed and that a direct year-to-year comparison is not possible.
- Operators and Market data: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioinzahlen.php.

Contact
- Elisa Pfäffli, Bioinspecta, Frick, Switzerland
- Helga Willer, FiBL, Frick, Switzerland

Syria
Source
Mediterranean Organic Agriculture Network MOAN c/o C.I.H.E.A.M; Bari; Italy. The data is from 2010.

Contact
Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Notes
No separate figure for the number of producers was available; the figure communicated is that for all operators in the country.

Taiwan, Province of China
Source
Taiwan Organic Agriculture Information Centre. Statistics 1996-2012 at http://info.organic.org.tw/supergood/front/bin/ptlist.phtml?Category=104854, Original Source: Agricultural and Food Agency, Council of Agriculture, Taiwan. The data are from 2012.

Tajikistan
Source
SAS - SUGDAGROSERV, 2 Baraka Boboeva, Khujand 735700, Tajikistan. (Data 2012). To these data, the data of one international certifier were added (2012).

Contact
Javohir Eshmatov, SAS - Sugdagroserv, 2 Baraka Boboeva, Khujand 735700, Tajikistan.

Tanzania
Source
Tanzania Organic Agriculture Movement (TOAM), PO Box 70089, Dar es Salaam, Tanzania, www.kilimohai.net. Survey among the organic operators in the country.

Contact
Noel C. Kwai, Tanzania Organic Agriculture Movement (TOAM), PO Box 70089, Dar es Salaam, Tanzania, www.kilimohai.net.

Thailand
Source
Green Net Survey among the international and domestic certifiers; Green Net, 10330 Bangkok, Thailand

Contact
Data provided by Vitoon Panyakul, Green Net, 10330 Bangkok, Thailand, www.greennet.or.th.

Timor-Leste
The data are based on the information of one international certifier.

Togo

Sources

The data were compiled by FiBL based on the data of the following international certifiers. Not all certifiers provided updated information.

- Ecocert, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com
- IMO, Weinfelden, Switzerland, www.imo.ch
- LACON GmbH, Brünnlesweg 19, 77654 Offenburg, Germany

Contact

- Loni Hensler, IMO, Weinfelden, Switzerland
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso
- Fabienne Verzeletti, LACON GmbH, Offenburg, Germany

Tonga

Sources

- Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

- Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Tunisia

Source

Source: Direction Générale de L'Agriculture Biologique (DGAB), Tunis, Tunisia

Contact

- Samia Maamer Belkhiria, Direction Générale de L'Agriculture Biologique (DGAB), Ministry of Agriculture and Hydraulic Resources, Tunis, Tunisia
- Prof. Dr. Mohamed Ben Kheder, B.P 54, Chatt Meriem, Sousse, Tunesia

Turkey

Source

- Ministry of Food, Agriculture and Livestock (MoFAL), Ankara, Turkey
- Market data (2010): Estimate by Erdal Süngü, MoFAL, Ankara, Turkey

Contact

- Erdal Süngü, Ministry of Food, Agriculture and Livestock (MoFAL), Ankara, Turkey, www.tarim.gov.tr.

Note

Some areas contain crops that can be harvested from the same parcel. Therefore, the total of the land use/crop data exceeds the actual area surface cultivated for organic farming. A correction value was used in order to calculate the correct total.
Data on the organic domestic market value are roughly estimated (2010 data).

Uganda

Source

National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug. The data is from 2012. The 2013 were received after the data for this publication were processed. The key data for 2013 are:

- Total organic agricultural land: 230'232 hectares;
- Producers: 186'778;
- Exports: 44.64 million US dollars.

Contact

Chariton Namuwoza, National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug.

Ukraine

Source

- Area: Organic Federation of Ukraine (OFU), Kyiv, Ukraine www.organic.com.ua
- Land use details, domestic market, international trade: Organic Federation of Ukraine (OFU), Kyiv, Ukraine, www.organic.com.ua

Contact

- Eugene Milovanov, Organic Federation of Ukraine, Kyiv, Ukraine www.organic.com.ua

United Arab Emirates

Source

Ministry of Environment and Water (MOEW), United Arab Emirates

Contact

- Eng. Saif Mohamed Alshara, Ministry of Environment and Water, United Arab Emirates
- Mohammad Al-Oun (PhD). Director, Water and Food Research Food Programme, Jordan National Centre for Research and Development

United Kingdom

Sources

- Land use details/crops/operators: Defra and National Statistics
- Market data: Soil Association 2014: Organic Market Report 2013. Bristol, United Kingdom

Contacts

- Dr. Catherine Gerrard and Dr. Susanne Padel, The Organic Research Centre Elm Farm, Newbury, UK, www.organicresearchcentre.com
- Martin Cottingham, UK

United States of America

Sources

- Land area and producers (from 2011): United States Department of Agriculture, Washington, USA, http://www.ers.usda.gov/data-products/organic-production.aspx#.UsV8fMpczGA.
- Market data: Organic Trade Association 2013: Organic Industry Survey, Brattleboro VT 05301, USA, www.ota.com

Contacts

- Catherine Greene, United States Department of Agriculture, Washington, USA, www.ers.usda.gov/briefing/organic/.
- Barbara Haumann, OTA, Brattleboro VT 05301, www.ota.com

Uruguay

Source

Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay, www.mgap.gub.uy. The data are from 2006

Contact

Betty Mandl, Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay, www.mgap.gub.uy.

Uzbekistan

Source

Certifier data, compiled by FiBL.

Vanuatu

Source

Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Venezuela

Note

Certifier data. The data is from 2009

Viet Nam

Source

Vietnam Organic Agriculture Association, Hanoi, Vietnam

Contact

Nhung Tu Thi Tuyet, Vietnam Organic Agriculture Association, Hanoi, Vietnam

Note

Data include PGS

Zambia

Source

OPPAZ, Lusaka, Zambia. The data are from 2009. To these data, area data from one international certifier on beekeeping and beehives were added.

Zimbabwe

Source

- Certifier data

Contact

- Dominikus Collenberg, Organic Africa, Harare, Zimbabwe
- Clifyn Mckenzie, Ecocert Southern Africa, Gardens Cape Town

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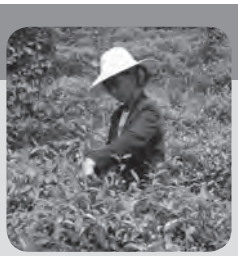

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- ☐ *Transition management* – shifting from conventional to organic methods

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- ☐ *Monitoring trading partners* – tools to assess trade relationships
- ☐ *Trade & certification* – harnessing diverse quality standards for trade

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How do you make sure that your products excel?

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- ☐ *Certification & documentation* – procedures to ensure annual approval

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