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The World of Organic Agriculture Statistics and Emerging Trends 2025

Edited by

Helga Willer, Jan Trávníček and Bernhard Schlatter

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Glossary

- €/person: Per capita consumption in euros
- AfrONet: African Organic Network
- AMI: Agrarmarkt-Informationsgesellschaft - Agricultural Market Information Company, Germany
- AU/AUC: African Union /African Union Commission
- CAP: Common Agricultural Policy of the European Union
- CAADP: Comprehensive Africa Agriculture Development Programme
- CIAO: Comisión Interamericana de Agricultura Orgánica/ Inter-American Commission for Organic Agriculture
- CIHEAM: Centre international de hautes études agronomiques méditerranéennes/ International Centre for Advanced Mediterranean Agronomic Studies
- COTA: Canada Organic Trade Association
- CPC: Candidates and Potential Candidates for the European Union
- CSC: Continental Steering Committee of the Ecological Organic Agriculture Initiative for Africa (EOA-I)
- EFTA: European Free Trade Association
- EOA: Ecological Organic Agriculture
- EOA-I: Ecological Organic Agriculture Initiative for Africa
- EU: European Union
- EU27: Member countries of the European Union from 2020 onward
- Eurostat: Statistical office of the European Union, Luxembourg
- FAO: Food 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: Global Agricultural Trade System of the Foreign Agricultural Service (FAS) of the United States Department of Agriculture (USDA)
- GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit/German Agency for International Cooperation
- GOTS: Global Organic Textile Standard
- ha: Hectares
- Horizon 2020: Research and Innovation Programme of the European Union, running from 2014 to 2020
- Horizon Europe: Research and Innovation Programme of the European Union, running from 2021
- HS codes: Harmonized System Codes
- ISO FAR: International Society of Organic Agriculture Research
- IFOAM – Organics International: Formerly International Federation of Organic Agriculture Movements (IFOAM)
- MOAN: Mediterranean Organic Agriculture Network hosted by CIHEAM Bari, Italy
- MT: Metric tons
- NOARA: Network of Organic Agriculture Researchers in Africa
- OTA: Organic Trade Association, United States of America
- Power BI: Interactive data visualization software product developed by Microsoft for business intelligence
- PGS: Participatory Guarantee Systems
- POETcom: Pacific Organic and Ethical Trade Community
- SECO: State Secretariat for Economic Affairs, Switzerland
- SÖL: Stiftung Ökologie & Landbau – Foundation Ecology & Agriculture, Germany
- TP Organics: European Technology Platform for Organic Food and Farming
- TRACES: TRAdE Control and Expert System The European Commission’s online platform for sanitary and phytosanitary certification required for EU imports
- U.S.: United States
- USDA: United States Department of Agriculture

Foreword from FiBL and IFOAM – Organics International

With this edition, FiBL and IFOAM – Organics International proudly present “The World of Organic Agriculture” for the 26th consecutive time.

Data collection is a primary and ongoing concern for the Research Institute of Organic Agriculture FiBL and IFOAM – Organics International. The extensive data provided over more than two decades in this publication serves as a vital tool for stakeholders, policymakers, authorities, the industry, as well as researchers and extension professionals. It has also proven invaluable for development programs and in supporting strategies for organic agriculture and markets, making it crucial for monitoring the impact of these activities.

The publication also demonstrates our continued commitment to transparency in the organic sector; the method of data collection has evolved over time to reflect the global status of organics as accurately as possible. “The World of Organic Agriculture” has become one of the most frequently cited sources in scientific, technical, and descriptive articles and reports on organic agriculture.

This publication also highlights the role of organic agriculture in overarching sustainability strategies such as the Sustainable Development Goals and the European Union’s Farm to Fork Strategy.

Considering that organic agriculture significantly contributes to all of these goals and strategies, this book not only presents data on land area, the number of producers, and market figures but also shows organic agriculture’s relevance in addressing climate change, ensuring food and nutrition security, halting biodiversity loss, and promoting sustainable consumption. Thus, it underscores its contribution to the transformation of food systems as a whole. “The World of Organic Agriculture” showcases the potential of organic farming to contribute to a sustainable future.

We extend our gratitude to the Swiss State Secretariat for Economic Affairs (SECO), the Coop Sustainability Fund, Bio Suisse and Nürnberg Messe for their support in making this publication possible. We would also like to express our appreciation to all the authors and data providers who have contributed in-depth information and figures related to their respective regions, countries, or fields of expertise. Finally, we wish to thank the editorial team for their dedication and commitment, as well as members of the FiBL and IFOAM team who have supported the activities in various ways.

Frick and Bonn, February 2025

Dr. Jörn Sanders
Chairman of the Management Board
Research Institute of Organic Agriculture FiBL
Frick, Switzerland

Ravi R. Prasad
Executive Director
IFOAM – Organics International
Bonn, Germany

Foreword from SECO

Increasing geopolitical and economic uncertainties are impacting global trade. While this also affects organic agriculture, data from the latest edition of the World of Organic Agriculture 2025 confirms the remarkable resilience of the global organic market: The area of global organic farmland area has slightly increased, as did the global market for organic food.

However, a closer look reveals a more differentiated picture between markets and products. In 2023, global organic agriculture demonstrated resilience amidst economic and geopolitical uncertainties, with total farmland expanding by 2.5 million hectares (+2.6 percent). Africa led in relative growth of organic farmland (+24.4 percent), highlighting the region's potential to further shape global supply chains. Retail sales surpassed 136 billion euros, with notable growth in high-consumption countries like Switzerland (468 euros per capita), which had the highest per capita consumption in the world.

Product-specific dynamics reveal expanding opportunities: organic bananas continue to grow in demand, while coffee and cocoa production remain crucial, with increasing consumer preference for double-certified (e.g., organic and Fairtrade).

The numbers from Ukraine are impressive: Despite the devastating impacts of Russia's war of aggression, Ukraine recorded an extraordinary increase in organic agricultural land in 2023, reaching almost half a million hectares. This remarkable growth demonstrates the resilience and adaptability of Ukrainian farmers, who continue to embrace organic farming even under the most challenging circumstances. However, this expansion contrasts with a decline in exports, reflecting the severe logistical disruptions caused by the war.

The Swiss State Secretariat of for Economic Affairs (SECO) supports this publication, which provides the latest figures on the state and development of organic agriculture. We believe that it is an important resource for sound analysis and informed decision making by researchers, policy makers, industry actors players and other stakeholders along the whole entire organic value chain.

Dr. Monica Rubiolo
Head of Trade Promotion
Swiss State Secretariat for Economic Affairs (SECO)
Bern, Switzerland

Foreword from the Editors

In the 26th edition of “The World of Organic Agriculture,” we present the latest available data on organic agriculture.

Over the past years, numerous individuals have contributed valuable information and data, with some supporting us from the very beginning. We are profoundly grateful to all our authors, data and information suppliers from around the world, as well as our supporters: the Swiss State Secretariat for Economic Affairs, the Coop Sustainability Fund, Bio Suisse, Nürnberg Messe, and IFOAM – Organics International.

Knowledgeable authors once again contributed articles about their regions countries or fields of expertise, covering topics such as the global market, policy support, public standards and legislation, Participatory Guarantee Systems, and the European Union’s organic import data. This edition also features new chapters, including discussions on the European Union’s 25% organic target, organic banana production, organic aquaculture, and an exploration of the implications of the new Organic Regulation on smallholder farmers.

We are pleased to announce that Bio Suisse, the Swiss organic umbrella organization, has become a new supporter of the yearbook, further strengthening its foundation and reach.

Additionally, we are excited to announce a special collaboration with Statista: FiBL data is now available on the Statista platform www.statista.com. This partnership enhances the visibility of our work and highlights the growing importance of reliable data in the field of organic agriculture.

Lastly, we are delighted to announce that the 14th Chinese edition of “The World of Organic Agriculture” will be published by the Organic and Beyond Company.¹

Helga Willer, Jan Trávníček and Bernhard Schlatter
Research Institute of Organic Agriculture FiBL
Frick, Switzerland

¹ All Chinese editions of «The World of Organic Agriculture» can be found on the Website of the Organic And Beyond Company at <http://www.oabc.cc/about/mag.asp>

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Organic Agriculture: Key Indicators and Top Countries

Indicator	World	Top countries
Countries with organic activities¹	2023: 188 countries	
Organic agricultural land	2023: 98.9 million hectares (2000: 15 million hectares)	Australia (53.0 million hectares) India (4.5 million hectares) Argentina (4.0 million hectares)
Organic share of total agricultural land	2023: 2.1 %	Liechtenstein (44.6 %) Austria (27.3 %) Uruguay (25.4 %)
Increase of organic agricultural land 2022/2023	2.5 million hectares (ha); +2.6 %	Uruguay: 831'287 ha (+30.3 %), China: 522'267 ha (+18.0 %) Spain: 316'550 ha (+11.8 %)
Wild collection and further non-agricultural areas	2023: 30.2 million hectares (ha) (1999: 4.1 million hectares)	Finland (6.9 million hectares) China (2.9 million hectares) India (2.9 million hectares)
Producers	2023: 4.3 million producers (1999: 200'000 producers)	India (2'358'267) Uganda (404'246) Ethiopia (121'552)
Organic market²	2023: 136.4 billion euros (2000: 15.1 billion euros)	US (59.0 billion euros) Germany (16.1 billion euros) China (12.6 billion euros)
Per capita consumption	2023: 17.0 euros	Switzerland (468 euros) Denmark (362 euros) Austria (292 euros)
Number of countries/territories with organic regulations (2022)	75 (fully implemented) 14 (drafting)	
Number of affiliates of IFOAM – Organics International	2023: 857 affiliates	Germany: 87 affiliates India: 58 affiliates China: 54 affiliates USA: 53 affiliates Italy: 32 affiliates

Source: FiBL survey 2025, based on national data sources, data from certifiers and IFOAM – Organics International

¹ Where the designation "country" appears in this book, it covers countries and territories, see UNSTAT website <https://unstats.un.org/unsd/methodology/m49/>

² Please note that there are some differences in organic food sales figures from Ecovia Intelligence and those from FiBL due to different methodologies. According to Ecovia Intelligence, global retail sales reached over 130.4 billion euros in 2023. (see article by Sahota in this volume).

One euro corresponded to 1.0813 US dollars in 2023 according to the European Central Bank.

The World of Organic Agriculture 2025: Summary

**JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER², MANUELA HELBING³ AND
HELGA WILLER⁴**

The latest global organic agriculture data for 2023 reveal steady progress. Organic farmland expanded to nearly 99 million hectares, with notable increases in Latin America, Europe, and Africa, while North America and Oceania reported slight declines. However, the number of organic producers decreased by over 4 percent, driven by reductions in India and Thailand. On the trade front, organic exports to the USA surged, while EU imports saw a decline. Despite economic pressures and challenges, global retail sales of organic products grew to over 136 billion euros.

Statistics on organic area

Nearly 99 million hectares of organic farmland

In 2023, almost 98.9 million hectares of agricultural land were organic (including in-conversion areas).

The regions with the largest organic agricultural land areas were Oceania (53.2 million hectares – comprising more than half of the world’s organic agricultural land, at 54 percent) and Europe (19.5 million hectares, accounting for 20 percent of global organic farmland). Latin America followed with 10.3 million hectares (10 percent), succeeded by Asia with 9.1 million hectares (9.2 percent), Africa with 3.4 million hectares (3.4 percent), and Northern America with 3.3 million hectares (3.4 percent). For details on organic areas, see chapters from page 34).

Australia has the largest area

The countries with the most organic agricultural land were Australia (53.0 million hectares), India (4.5 million hectares) and Argentina (4.0 million hectares).

Globally, 2.1 percent of the farmland is organic

In 2023, 2.1 percent of the world’s agricultural land was organic. The highest organic shares of the total agricultural land, by region, were in Oceania (14.1 percent) and in Europe (3.9 percent; European Union: 10.9 percent).

Liechtenstein has the highest organic share, with almost 45 percent

Some countries achieve significantly higher organic shares compared to the global average. Liechtenstein (44.6 percent), Austria (27.3 percent), and Uruguay (25.4 percent)

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²Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

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had the highest organic shares. Remarkably, in 22 countries, 10 percent or more of their agricultural land was organic.

Continuous growth in organic farmland – Increase of 2.5 million hectares

Organic farmland witnessed an expansion of 2.5 million hectares (2.6 percent) in 2023, with numerous countries reporting significant growth.

The largest increases in absolute terms were observed in Uruguay, China, and Spain. Uruguay's organic farmland surged by more than 831'287 hectares (+30.3 percent), while China experienced a growth of 522'267 hectares (+18 percent), and Spain saw an increase of 316'550 hectares (+11.8 percent).

Nevertheless, some countries experienced a decrease in organic farmland, with the most significant decline occurring in Canada and India, where data showed a reduction of nearly 0.28 and 0.26 million hectares, respectively.

Organic farmland expansion: Notable growth in Africa and Latin America

Africa achieved the most remarkable farmland growth, recording a 24.4 percent increase (+0.7 million hectares), making it the fourth-largest organic region globally, ahead of North America. Latin America led absolute growth (+10.8 percent, +1.0 million hectares), followed by Europe (+4.1 percent, +0.8 million hectares). Meanwhile, organic land decreased in North America (-7.7 percent, -0.3 million hectares) and Oceania (-0.02 percent, -10'123 hectares).

Consistent growth across all organic land use categories in 2023

Land use and crop details were available for over 92 percent of the organic agricultural land. However, some countries with very large organic areas, such as Brazil and India, had limited or no information on their land use (see chapter from page 53).

Grassland/grazing areas constituted more than two-thirds of the organic agricultural land, accounting for over 68.5 million hectares and experiencing a 1.2 percent increase in 2023.

Arable land, covering almost 16.2 million hectares, made up 16.3 percent of the organic agricultural land. This category reported a 6.9 percent increase since 2022 and was primarily utilized for cereals, including rice, along with green fodder from arable land, oilseeds, textile crops, and dry pulses.

Permanent crops occupied 6.8 percent of the organic agricultural land, totalling over 6.7 million hectares. Compared to the previous survey, an increase of more than 523'000 hectares or 8.5 percent was reported. The most significant crops in this category included nuts, coffee, olives, grapes, and cocoa (see chapter on land use in organic agriculture from page 53).

Further organic areas

Apart from land dedicated to organic agriculture, there are further areas of organic land dedicated to other activities. The largest parts of these are wild collection areas and beekeeping areas. Further non-agricultural areas include aquaculture, forests and grazing areas on non-agricultural land. These areas totalled 32.0 million hectares, and

all the organic areas together summed up to 130.9 million hectares (see chapter from page 59).

Opportunities and challenges in organic banana production

Bananas remain one of the most consumed fruits worldwide, valued for their affordability, convenience, and nutritional benefits. Organic banana production grew to over 100'000 hectares in 2023, with Ecuador, the Dominican Republic, and the Philippines leading. However, challenges like Fusarium TR4 and climate impacts threaten supply chains, particularly for the Cavendish variety, which dominates exports. Organic farming methods provide pest and disease tolerance, supported by biodiversity and reduced chemical inputs. Demand for organic and double-certified Fairtrade bananas is driving growth, with the market expected to expand by 11 percent annually to 2.71 billion US dollars by 2029. Innovations, including new supply chains for speciality varieties like baby bananas, highlight the sector's adaptability and continued relevance in global markets.

Global count of organic producers fell by 4 percent in 2023¹

In 2023, the global count of organic producers decreased to 4'332'500, representing a decline of -181'950 producers or 4.0 percent compared to the previous year. Asia continued to lead with 59.5 percent of the world's organic producers, followed by Africa at 22.4 percent, Europe at 11.4 percent, and Latin America at 5.7 percent.

The top three countries with the highest number of organic producers remained India (2'358'267), Uganda (404'246), and Thailand (31'632). However, the decline was primarily driven by significant reductions in the number of producers in India (-122'592) and Thailand (-89'917). For more information on organic operators, see page 41.

Organic exports to the USA soar by 27 percent, and EU imports decline by more than 9 percent

In 2023, the combined organic imports of the EU and the USA reached 5'243'469 metric tons (MT), reflecting a 7.1 percent increase compared to the previous year. While exports to the EU declined by 9.1 percent (from 2.73 million metric tons in 2022 to 2.48 million metric tons in 2023), exports to the USA surged by an impressive 27.4 percent (from 2.17 million metric tons in 2022 to 2.76 million metric tons in 2023). Please note that the US organic export statistics does not cover all product categories.

The top exporters were Mexico (728'632 metric tons), Ecuador (665'483 metric tons), and Peru (302'826 metric tons). Mexico recorded the highest growth in export volume, with an increase of 192'904 metric tons, followed by Canada (+99'664 metric tons) and Türkiye (+96'489 metric tons).

¹ Please note that some countries report only the numbers of companies, projects, or grower groups, which may each comprise a number of individual producers. It may be assumed that the total number of organic producers is higher than that reported here.

On the other hand, notable declines in exports were observed in Ukraine (-89'848 MT, mainly soybeans and maize), the Dominican Republic (-59'981 MT, mainly bananas), and Paraguay (-44'619 MT, mainly sugar).

The top three imported organic products were bananas (1'250'628 MT), sugar (500'733 MT), oilcakes (408'874 MT, mainly soybean oilcakes) and soybeans (383'132 MT), accounting for 49 percent of the total organic imports. The USA, the Netherlands, and Germany were the leading importers, together accounting for nearly 76 percent of all organic imports. For more information, see page 45.

The global organic market reached 136 billion euros, driven by growth in the United States, Europe and Asia

Organic food and drink sales reached 136 billion euros in 2023^{1,2} (page 48). In 2023, the countries with the largest organic markets were the United States (59'003 million euros), Germany (16'080 million euros) and China (12'648 million euros). The largest single market was the United States (43.2 percent of the global market), followed by the European Union (46'474 million euros, 34.1 percent) and China (12'648 million euros, 9.3 percent). Switzerland had the highest per-capita consumption in 2023, with 468 euros. The highest organic market shares were reached in Denmark (11.8 percent), Switzerland (11.6 percent), and Austria (11.0 percent). Several markets experienced modest growth, with Europe increasing by 3.0 percent and Asia by 2.9 percent. The world's largest market, the United States, grew by 3.4 percent. For more information, see page 48.

The global organic food and drink market grew in 2023, primarily driven by rising prices rather than increased sales volumes. North America and Europe accounted for most of the global revenues, with the U.S. leading as the largest market. Inflation and economic uncertainty have slowed growth, particularly in Europe and Canada, while emerging markets in Asia, Latin America, and Africa have expanded their roles as producers and exporters. Concerns persist over fragmented organic standards, but demand remains strong, especially among younger consumers. For more information, see the chapter by Sahota on page 102.

Statistics of the Biodynamic Federation Demeter International

The Biodynamic Federation Demeter International (BFDI) comprises 53-member organisations across 40 countries, promoting biodynamic agriculture under the Demeter brand. As of 2024, the network includes over 7'000 Demeter-certified farms spanning 260'000 hectares in 62 countries. Biodynamic viticulture is a standout sector, with 1'439 certified wineries (26'556 hectares), led by France, the USA, Chile, and Argentina. Since 2000, the number of Demeter farms has grown by 4'000, reflecting

¹ Please note that there are some differences in organic food sales figures from Ecovia Intelligence and those from FiBL due to different methodologies. According to Ecovia Intelligence, global retail sales reached over 130.4 billion euros in 2023.

² In 2023, 1.0813 US dollars corresponded to 1 euro.

rising global interest in biodynamic practices. BFDI also supports research, training, certification, marketing, and advocacy for sustainable agriculture, with recent expansions in biodynamic bananas, olive oil, and vineyards. More details are available from the contribution by Behr (page 95).

Policies, PGS and new Organic Regulation

Policies for organic farming

In their article “Policies Advancing Agroecology and Organic Agriculture in 2024”, Brahim and Figeczky show that in 2024, governments worldwide strengthened agroecology and organic farming policies, driving sustainable food systems. Europe advanced pesticide residue rules and certification frameworks under the EU Green Deal. Africa saw growing agroecology strategies, yet funding remains limited. Latin America launched ambitious national plans, while Asia prioritised climate-resilient agriculture and organic expansion. Despite progress, scaling innovation, aligning budgets, and fostering collaboration is critical for meeting sustainability goals. For more information, see the article by Brahim and Figeczky on page 108.

Global Trends in Participatory Guarantee Systems (PGS) 2024

In 2024, 343 Participatory Guarantee System (PGS) initiatives were identified globally, covering 1.29 million hectares. Latin America leads with 149 initiatives (43 percent of the total), while Asia hosts the largest certified area (1.2 million hectares). Africa has 53 initiatives, Europe 28, and Oceania 18, with North America having the fewest (2). Of these initiatives, 79 percent are operational, reflecting the growing global emphasis on PGS as a tool for certifying organic farming. See article from de Jorge on page 116.

EU Rules challenge smallholder farmers

The EU Organic Regulation 2018/848 replaces the equivalence system with stricter compliance rules for imports, requiring third-country producers to fully meet EU organic standards by 2024. This poses significant challenges for smallholder groups, particularly in Africa, Asia, and Latin America, where many must restructure to comply. Increased costs, stricter certification, and new pesticide rules may force some farmers out of EU markets, risking supply shortages of organic coffee, cocoa, and tropical fruits.

Africa

In 2023, Africa achieved remarkable growth in organic farming, with certified organic agricultural land expanding by an impressive 24.4 percent—the highest increase among all regions. This growth added over 668’000 hectares, bringing the total to 3’403’319 hectares. The region also had almost one million producers actively engaged in organic farming, with Uganda leading in both organic land area (505’308 hectares) and the number of producers (404’246). In São Tomé and Príncipe, 22.1 percent of the country’s total agricultural land is devoted to organic farming, highlighting its significant role in the sector. Africa’s key organic products include oilseeds (over 92 percent were

soybeans), coffee, nuts, textile crops, cocoa, and olives, most of which are targeted for export markets. For more information about statistics in Africa, see page 157.

The African Union Ecological Organic Agriculture Initiative (EOA-I), supported by global donors, made significant strides in 2024, reaching 2.8 million farmers, with 88.9 percent adopting ecological organic agriculture practices. It produced 55 validated knowledge products, such as manuals on soil fertility and organic standards, and established 32 Participatory Guarantee System (PGS) groups to promote local organic markets. The Knowledge Centre for Organic Agriculture and Agroecology (KCOA) reached 19 million farmers and value chain actors, uploaded 1'000 knowledge products in over 20 languages to its digital platform, and hosted 81 awareness events across Africa. The African Organic Network (AfrONet) hosted the Zanzibar Organic Festival, co-organized a conference on the European Union's Plant Reproductive Material regulations, and advanced preparations for the 6th African Organic Conference (AOC), scheduled for Zambia in 2026, following the successful 5th AOC in Rwanda in 2023. The Network of Organic Agriculture Researchers in Africa (NOARA) published proceedings from the 5th AOC, began biodiversity research in four countries and initiated planning for the 2nd African Organic Research Conference, set for 2025. For more updates about Africa, see the contribution by Amudavi et al., page 122.

Asia

In 2023, Asia had over 9.1 million hectares of organic agricultural land, managed by approximately 2.6 million producers, representing 59 percent of the total organic producers. India led in both organic area and the number of producers, with 4.5 million hectares and 2.4 million producers. China followed with 3.4 million hectares, while Kazakhstan ranked third with 0.2 million hectares. Timor-Leste had the highest organic area share at 9.2 percent, followed by India and Sri Lanka, both with 2.5 percent. For more information about Asian statistics, see page 157).

In 2024 and early 2025, significant progress was made in organic agriculture across Asia, driven by national and regional initiatives. China implemented over 160 new local policies to promote organic farming and issued a record 5 billion organic product labels, underscoring robust governmental support. India introduced updated organic certification standards, launched an upgraded traceability system, and announced plans for a unified, organic logo by 2025 to enhance its regulatory framework. Japan expanded certified organic land to 30'000 hectares, fuelled by mandatory certification for organic livestock and proactive local government programs in schools and communities. Indonesia initiated its first organic dairy program and promoted youth entrepreneurship in organic farming through the YESS Program. Mongolia prepared to implement its Law on Organic Products in 2025, aiming for a 5 percent organic share in agricultural output by 2030. Saudi Arabia advanced organic olive farming through integrated support systems and international partnerships. Additionally, IFOAM – Organics Asia registered as an NGO in China, launched the Dryland and Deserts Organic Agriculture Network (DOAN), and scheduled the first "Organic Festa Asia" for 2025. These initiatives highlight Asia's growing commitment to organic farming

through strong policy support, innovative programs, and international collaboration. More information is available in the chapter of IFOAM Organic Asia on page 146.

Europe

Statistics: By the end of 2023, Europe had 19.5 million hectares of organic agricultural land (EU: 17.7 million hectares) managed by 494'624 producers (EU: 434'577). Organic farmland increased by 0.77 million hectares (+4.1 percent) across Europe and by 0.62 million hectares (+3.6 percent) in the EU. Europe's organic area accounted for 3.9 percent of total farmland, with the EU's share reaching 10.9 percent. Spain (2.99 million hectares), France (2.77 million hectares), and Italy (2.46 million hectares) were the top three countries by organic area. Sixteen countries had more than 10 percent of their farmland under organic management, with Liechtenstein leading at 44.6 percent, followed by Austria (27.3 percent) and Estonia (22.9 percent). Retail sales of organic products in Europe amounted to 54'736 million euros (+3 percent), while the EU recorded sales of 46'487 million euros (+2.9 percent). Germany, France, and Switzerland remained the largest organic markets, with retail sales of 16'080 million euros, 12'081 million euros, and 4'193 million euros, respectively. See page 175 for more details.

In 2023, **imports of organic agri-food products into the EU** declined by 9.1 percent, decreasing from 2.73 million metric tons in 2022 to 2.48 million metric tons—a reduction of 247'456 metric tons. This marks the lowest level since 2018. The decline was primarily driven by reduced imports of vegetable and animal oils and fats, oilseeds, sugar, and non-tropical fruits. While imports of dry pulses, cereals, and feedstuffs increased, they were insufficient to offset the overall reduction. The decline is linked to factors such as reduced demand due to higher inflation, supply chain disruptions, climate change impacts, and shifts in consumer behaviour and market dynamics. For details, see the summary on EU organic imports on page 202.

Organic aquaculture remains a niche market despite growing consumer interest. Europe accounted for 6.7 percent of its total aquaculture, with mussels, salmon, and trout dominating production. Regulatory constraints, high costs, and limited organic inputs challenge growth. Positive consumer attitudes and demand driven by environmental and ethical concerns offer potential. To meet the EU's Farm-to-Fork goals, tailored policies, incentives, and public awareness are essential. For details, see the contribution by Lembo and Toomey on page 220.

In 2024, EU **organic policy developments** focused on imports, with four new regulations addressing the transition from equivalence to compliance for third-country operators, effective January 2025. Renegotiations of equivalence agreements with major trade partners like Argentina, Canada, and the US are underway, except for countries with existing trade deals (e.g., Chile, UK). The European Green Deal, alongside protests, shaped debates on balancing environmental goals with competitiveness. The Strategic Dialogue on EU Agriculture emphasised sustainable farming while ensuring farmer livelihoods. Thanks to the advocacy efforts of TP Organics, organic farming research advanced through Horizon Europe funding and initiatives like "A Soil Deal for Europe" and the partnership Agroecology. Events like the European Organic Congress in Hungary and TP Organics' Organic Innovation Days highlighted the

organic sector's key role in tackling climate, biodiversity, and food system challenges. However, CAP eco-schemes and national strategies showed insufficient ambition to meet the goal of converting 25 percent of EU farmland to organic by 2030. 2025 will bring pivotal policy and funding decisions for the sector. For details, see the contribution by Gernert et al. on page 165.

The European Union (EU) aims to achieve **25 percent organic farmland by 2030** under its Farm-to-Fork strategy, requiring significant growth beyond the current 10.9 percent (17 million hectares). Market and policy support are key, but challenges persist, including insufficient Common Agricultural Policy (CAP) funding and uneven national targets. Organic action plans and supply-demand policies offer potential, but stronger reforms, collaboration, and innovation are needed. The OrganicTargets4EU project explores strategies to close gaps, with results expected by 2026. Reforms in Agricultural Knowledge and Innovation Systems (AKIS) and public engagement are vital. For details, see the contribution by Lampkin et al. on page 213.

Latin America and the Caribbean

In 2023, Latin America and the Caribbean reported 10.3 million hectares of organic agricultural land managed by 249'095 producers, representing 10.5 percent of the global organic area and 1.6 percent of the region's total agricultural land. Argentina led the region with 4.0 million hectares, followed by Uruguay with 3.6 million hectares and Brazil with 1.0 million hectares. Uruguay had the highest organic share of total agricultural land at 25.4 percent, followed by French Guiana with 13.0 percent and Dominica with 11.6 percent. Key organic exports from the region included bananas, coffee, tomatoes, and soybeans. The region remains a significant player in the global organic market due to its large-scale organic production and export-oriented agriculture (see chapter on statistics on page 226).

North America

In 2023, North America had 3.3 million hectares of organic agricultural land, representing 0.7 percent of the total agricultural area in the region. The United States accounted for 2.06 million hectares, while Canada had 1.29 million hectares. The organic market in North America recorded retail sales of 63'920 million euros. For details, see page 242.

United States

According to OTA's 2024 Organic Industry Survey, organic food sales in the United States reached 59'003 million euros (63.8 billion US dollars). The country had 2.06 million hectares of farmland under organic management, representing 0.5 percent of the total agricultural area.

In 2024, the U.S. organic sector navigated significant regulatory, economic, and market changes. The Strengthening Organic Enforcement rule improved fraud prevention and traceability, requiring certifications for importers/exporters and electronic import certificates. New Organic Livestock and Poultry Standards set higher animal welfare requirements, with full compliance expected by 2029. Inflation and rising costs

challenged farmers, leading to USDA initiatives like the 85 million US dollar Organic Market Development Grant and the Organic Dairy Marketing Assistance Program. Organic food sales hit a record 63.8 billion US dollars (59 billion euros) in 2023, driven by Millennials and Gen Z consumers who trust the USDA Organic seal. U.S. organic exports grew, supported by federal promotion funding, with demand increasing in Asia, Latin America, and Africa. Despite uncertainties in the Farm Bill and political changes under a new administration, the sector showed resilience, balancing regulatory advancements with global market opportunities and continued consumer demand. For more information, see the contribution by McNeil on page 234

Canada

Canada's organic market thrived in 2023, valued at 9.01 billion CAD (€6.13 billion), with organic food and beverage sales growing by 10.1 percent since 2020 to reach 7.18 billion Canadian dollars (4.88 billion euros). Despite strong demand, certified operators fell by 2 percent to 7'558, reflecting challenges in maintaining operations. Maple production surged by 21 percent, while pastureland contracted by 29 percent. Exports reached 684.6 million Canadian dollars (465.5 million euros), with Quebec contributing 47 percent of the total, driven by a 131.9 percent increase in maple syrup exports. On the policy front, Canada revised equivalency arrangements with Japan (adding alcoholic beverages) and signed a new agreement with South Korea. Canada also piloted compliance with the USDA's stricter organic import requirements, facilitating smooth trade transitions. These efforts underscore Canada's resilience and growing role in the global organic market. For more information, see the contribution by Loftsgard on page 240.

Oceania

In 2023, Oceania had 53.2 million hectares of organic agricultural land managed by 15'575 producers, representing 14.1 percent of the region's total agricultural land and accounting for 53.8 percent of the world's organic area. More than 99.7 percent of the organic land in the region was in Australia (53.0 million hectares), followed by New Zealand (79'347 hectares) and Samoa (41'307 hectares). The highest organic share of total agricultural land was recorded in Samoa (14.6 percent), followed by Australia (14.6 percent), French Polynesia (9.3 percent), Solomon Islands (6.3 percent), and Fiji (4.1 percent). More data can be found on page 256.

Australia

In 2024, Australia's organic sector addressed challenges from the lack of domestic regulation, which undermines consumer trust and export potential. The Organic Development Group pushed for mandatory standards, resulting in the National Organic Standard Bill 2024, aiming to establish a unified certification framework and tackle greenwashing. The "Trading North" report highlighted harmonised standards, financial support, and trade assistance to unlock growth, especially in Southeast Asia. Despite managing over 53 million hectares of certified organic land—more than half the global total—Australia accounts for just 1.3 percent of global organic sales, indicating room for expansion. Lobbying efforts and public hearings amplified the

sector's message, while improved data collection remains key to driving growth and cementing Australia's global leadership. (See article by Frampton on page 248).

Pacific Islands

In 2023, Pacific Island nations advanced organic agriculture through policy initiatives, training 49 organic auditors and expanding Participatory Guarantee Systems (PGS), now involving over 2'000 growers. French Polynesia's agriculture census used TAPE, a global first, to analyse organic farming. Challenges remain, including high certification costs and underdeveloped value chains. Development projects like Organic Learning Farms and PROTÉGÉ promote agroecology while local markets grow with PGS-certified products and tourism demand. (See the article by Mapusua on page 252).

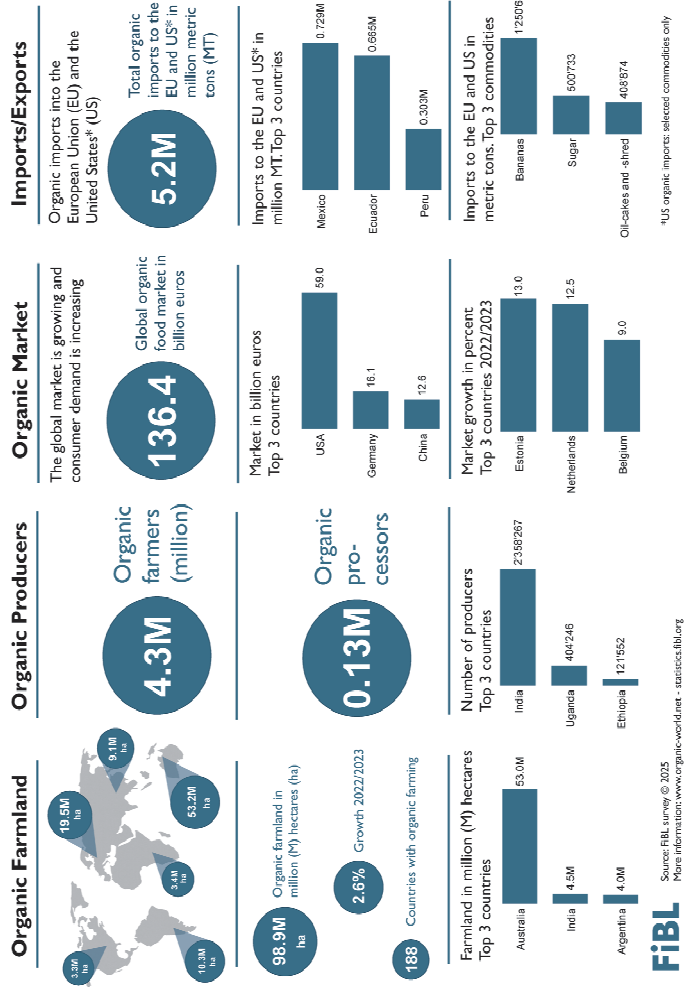
Organics: Beating the Odds

Despite global challenges, the organic movement demonstrated resilience in 2024, with organic farmland growing by 2.6 percent, led by Africa's 24.2 percent increase, surpassing North America, writes Ravi R. Prada, Executive Director of IFOAM Organics – International. Retail sales also rose steadily. IFOAM – Organics International advanced its 10-year strategy, hosted the 21st Organic World Congress, and advocated for policies supporting organics globally. Key initiatives included capacity-building projects in Asia and Africa and fostering collaboration to position organics as central to climate, health, and food systems solutions. For more information, see the contribution by Ravi R. Prasad, the Executive Director of IFOAM Organics International, on page 262.

Next FiBL survey on organic agriculture worldwide

The next global organic survey will commence in mid-2025, with results published in February 2026 and presented at the Biofach Organic Trade Fair in Nuremberg, Germany. We will reach out to relevant experts and kindly request your support in providing data. If you notice any errors in the statistical data in this volume, please inform us. Corrections will be made in our database and reflected in the 2026 edition of The World of Organic Agriculture as well as on www.organic-world.net. Contact: helga.willer@fibl.org

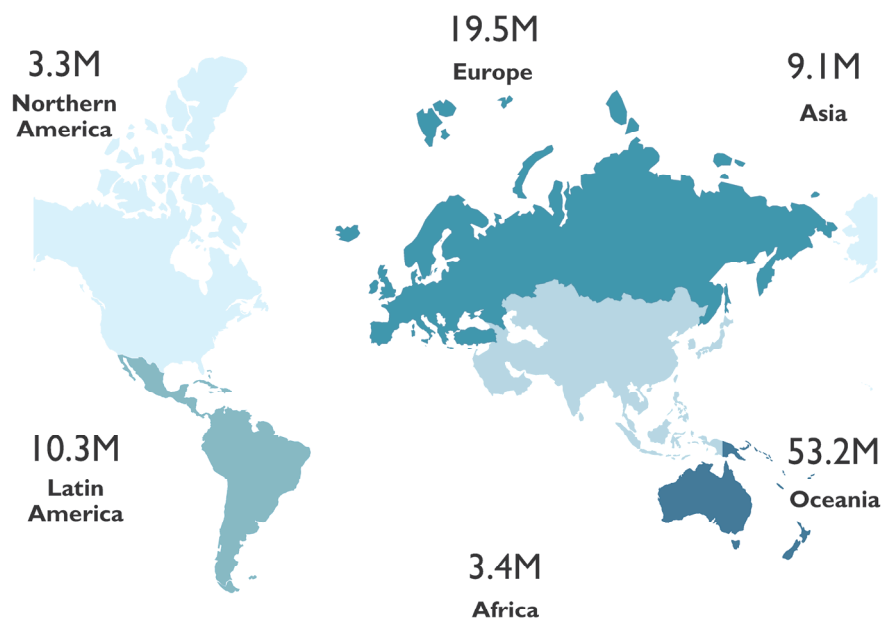
Organic Agriculture Worldwide 2023



Infographic 1: Organic agriculture worldwide - key indicators 2023

Source: FiBL survey 2025

Organic Agriculture Worldwide: Current Statistics



Organic agricultural land in hectares (M=millions)

Map 1: Organic agricultural land in 2023

Source: FiBL survey 2025

Current Statistics on Organic Agriculture Worldwide: Area, Operators, International Trade and Retail Sales

BERNHARD SCHLATTER¹, JAN TRÁVNÍČEK², MANUELA HELBING³ AND HELGA WILLER⁴

Introduction

The 26th survey of certified organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in collaboration with many partners from around the world. The results are published jointly with IFOAM – Organics International. The survey was supported by the Swiss State Secretariat for Economic Affairs (SECO), the Sustainability Fund of Coop Switzerland, Bio Suisse and NürnbergMesse.⁵

For this survey, 188 countries were covered using the following indicators: Area, producers and other operator types, retail sales and exports and imports.

In total, data were provided by more than 200 experts. 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 several countries: ACO Certification, Bioinspecta, Bioagricert, CCPB, CERES, Certisys, Control Union, Ecocert, Mayacert, Ecoglobe, Ekoagros, Imocert, Kiwa BCS Öko-Garantie GmbH, LETIS, NASAA Certified Organic (NCO), Organic Agriculture Certification Thailand (ACT), Organización Internacional Agropecuaria (OIA), OneCert and Quality Certification Services (QCS).

Our collaboration with the Inter-American Commission for Organic Agriculture (CIAO) eases data collection in Latin America and the Caribbean substantially. Data from the Mediterranean countries were supplied by the Mediterranean Organic Agriculture Network (MOAN, c/o Mediterranean Agronomic Institute of Bari). Data from the Pacific Islands were provided by the Pacific Organic and Ethical Trade Community (POET.com). Another important source covering many countries is Eurostat, the statistical office of the European Union. For more details about the data providers, the countries and indicators covered as well as general notes on the data, see page 349.

More information on statistics.fibl.org

Interactive tables and graphs with more details on crops, markets, and international trade, as well as explanations for data, can be found on FiBL's statistics website statistics.fibl.org.

¹ Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

² Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

³ Manuela Helbing, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

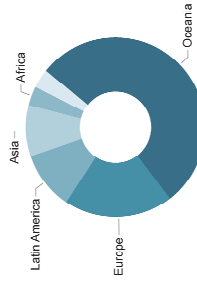
⁴ Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

⁵ 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.

WORLD: ORGANIC FARMLAND 2023



In Oceania there were 53.2 million (M) hectares (ha), in Europe 19.5 million ha and in Latin America 10.3 million ha.

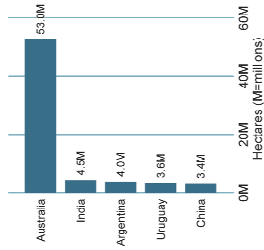


Distribution of organic agricultural land by region 2023

FIBL www.fibl.org



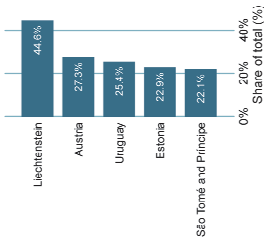
The ten countries with the largest organic agricultural areas represented 82% of the world's organic agricultural land.



The five countries with the largest areas of organic agricultural land 2023



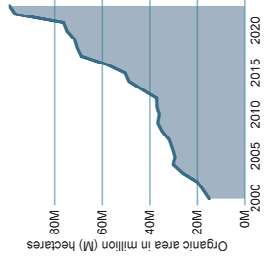
22 countries had 10% or more of their agricultural land under organic management.



Top 5 countries with more than 10% of organic agricultural land 2023



In 2023, over 2.5 million hectares more were reported compared with 2022.



Growth of the organic agricultural land 2000-2023

Source: FIBL 2025 www.organic-world.net - statistics.fibl.org

Infographic 2: Organic farmland 2023

Source: FIBL survey 2025

Organic land

Organic agricultural land

In 2023, 98.9 million hectares were under organic agricultural management worldwide.¹ This constituted 2.1 percent of the total farmland. Organic farmland increased by 2.6 percent or by 2.5 million hectares in 2023.

- The region with the most organic agricultural land was Oceania, with 53.2 million hectares, followed by Europe with 19.5 million, Latin America (10.3 million), Asia (9.1 million), Africa (3.4 million) and Northern America (3.3 million).
- Oceania had more than half (54 percent) of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, had nearly 20 percent of the world's organic agricultural land, followed by Latin America with more than 10 percent (Figure 1, page 35).
- Australia was the country with the most organic agricultural land; it is estimated that 99 percent of the farmland is extensive grazing areas. India was second, followed by Argentina in third place (Figure 2, page 35).
- The ten countries with the largest organic agricultural areas had a combined total of 80.7 million hectares (82 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 constituted approximately 32.0 million hectares.

Table 1: World: Organic agricultural land (including in-conversion areas) by region: growth 2022 to 2023, and 10-year growth

Region	Organic agri. land 2022 [ha]	Organic agri. land 2023 [ha]	Share of total [%]	1-year growth [ha]	1-year growth [%]	10-year growth [ha]	10-year growth [%]
Africa	2'734'707	3'403'319	3.4	668'612	24.4	2'150'010	171.5
Asia	8'768'293	9'137'495	9.2	369'203	4.2	5'621'917	159.9
Europe	18'690'917	19'457'600	19.7	766'684	4.1	7'700'277	65.5
Latin America	9'337'643	10'347'833	10.5	1'010'190	10.8	3'517'256	51.5
North America	3'627'818	3'349'255	3.4	-278'563	-7.7	890'790	36.2
Oceania	53'188'774	53'178'651	53.8	-10'123	-0.02	30'296'236	132.4
World*	96'339'704	98'865'120	100	2'525'417	2.6	50'170'448	103.0

Source: FiBL survey 2025, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 333. * Total includes correction value for French Overseas Departments

Figures and tables on organic land

- Figures on organic farmland can be found on the following pages.
- Tables with area data per country can be found from page 269.

¹Data provided both for the fully converted and in conversion area are included in this work. However, the conversion area is not known for many countries.

World: Distribution of organic agricultural land by region 2023

Source: FiBL survey 2025

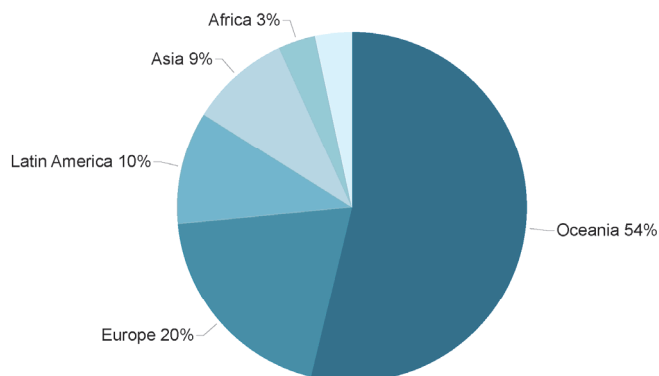


Figure 1: World: Distribution of organic agricultural land by region 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: The ten countries with the largest areas of organic agricultural land 2023

Source: FiBL survey 2025

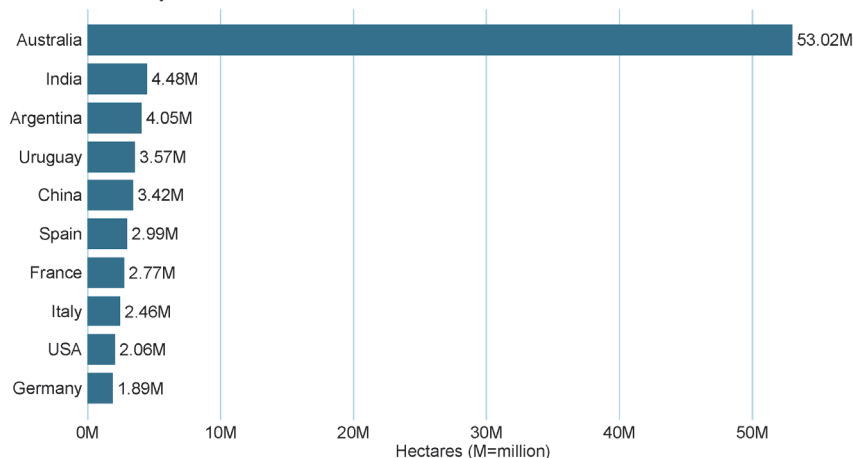


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Organic share of total agricultural land

The share of the world’s agricultural land that is organic was 2.1 percent in 2023.

- The highest organic share of total agricultural land, by region, was in Oceania (14.1 percent), followed by Europe with 3.9 percent and Latin America with 1.6 percent. In the European Union, the organic share of the total agricultural land was 10.9 percent. In the other regions, the share is less than 1 percent.
- Many individual countries, however, have a much higher organic share (Table 38, page 274), and in 22 countries, 10 percent or more of the agricultural land is used for organic production. Most of these countries are in Europe. The country with the highest organic share was Liechtenstein, with almost 45 percent of its agricultural land under organic management. It is interesting to note that many island states have high shares of agricultural land under organic management, such as São Tomé and Príncipe, Samoa and French Guiana.
- However, 55 percent of the countries for which data is available had less than 1 percent of their agricultural land under organic management.

World: Countries with an organic share of the total agricultural land of at least 10 percent 2023

Source: FiBL survey 2025

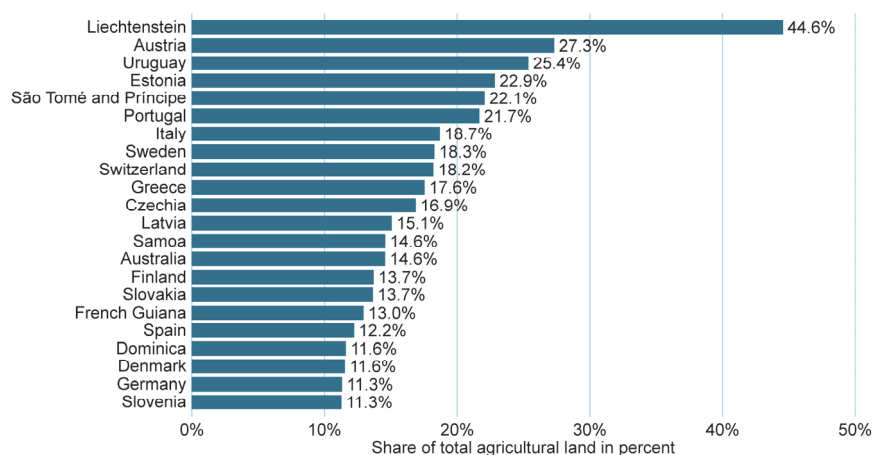


Figure 3: World: Countries with an organic share of the total agricultural land of at least 10 percent 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Calculation of organic shares based on FAOSTAT, Eurostat, and national sources. For detailed data sources, see annex, page 333.

To calculate the percentages, the data on the total agricultural land for most countries was taken from FAO’s Statistical database on the FAOSTAT website. For the European Union, most data were obtained from Eurostat. Where available, data from national sources were used for the total agricultural land (for instance, Austria, Switzerland, and the United States), which sometimes differs from that published by Eurostat or FAOSTAT. Please note that the calculation of the organic shares based on Eurostat and FAOSTAT data may differ in some cases from the data published by ministries and experts. FAOSTAT, the FAO Homepage, FAO, Rome at faostat3.fao.org > Agri-Environmental Indicators > Download <http://www.fao.org/faostat/en/#data/RL>

Growth of the organic agricultural land

Compared with 2000, when 14 million hectares were organic, organic agricultural land has increased nearly sevenfold (2023).

- In 2023, 2.5 million hectares, or 2.6 percent more were reported compared with 2022.
- In 2023, the organic agricultural land increased in all regions except North America and Oceania (Table 1). The highest absolute growth was in Latin America (+10.8 percent, +1.0 million hectares), followed by Europe (+4.1 percent, +0.8 million hectares), and Africa (+24.4 percent, +0.7 million hectares). The organic agricultural land decreased in North America (-7.7 percent, -0.3 million hectares) and Oceania (-0.02 percent, -10'123 hectares).
- Some countries reported a significant increase, mainly Uruguay (30.3 percent increase; over 0.8 million hectares more), China (18.0 percent increase; over 0.5 million hectares more), and Spain (11.8 percent increase; more than 0.3 million hectares more) (Figure 6).
- Seventy-eight countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 57 countries. In 34 countries, the organic agricultural area either did not change, or no new data was received.

The figures shown in the tables and graphs with historical figures may differ from what was previously communicated, as data revisions were received and included in the FiBL database.

World: Growth of organic agricultural land and organic share 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

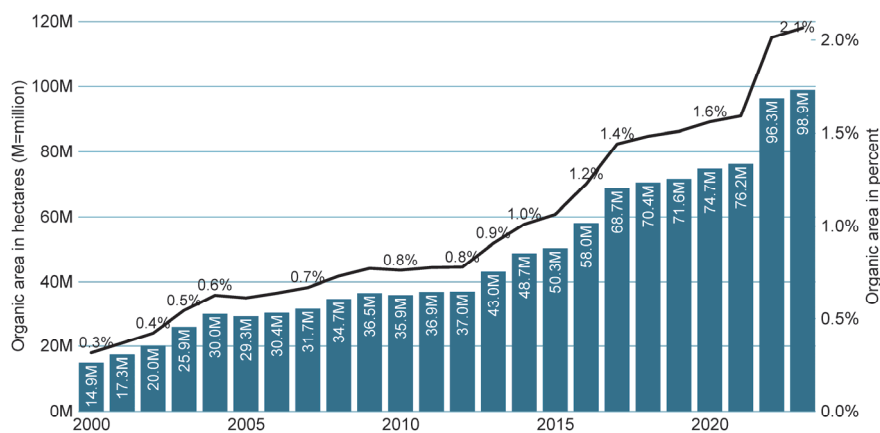


Figure 4: World: Growth of the organic agricultural land and organic share 2000-2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

World: Growth of the organic agricultural land by continent 2002 - 2023

Source: FiBL-IFOAM surveys 2001-2025

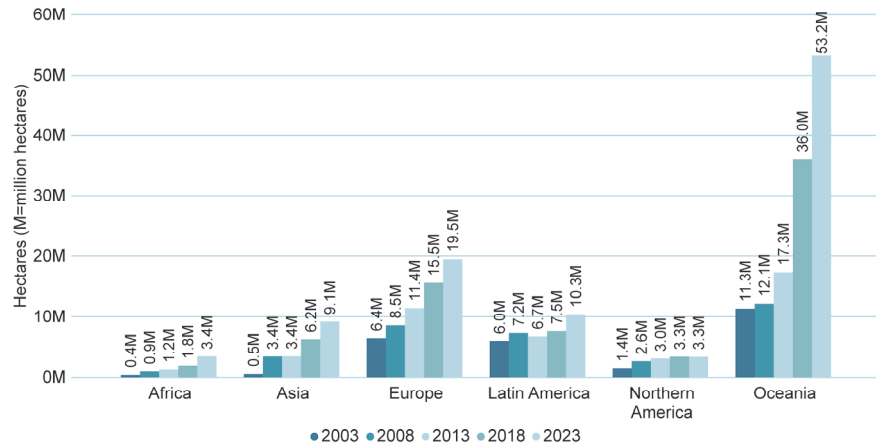


Figure 5: World: Growth of the organic agricultural land by region 2003 to 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

World: The ten countries with the highest increase of organic agricultural land 2023

Source: FiBL survey 2025

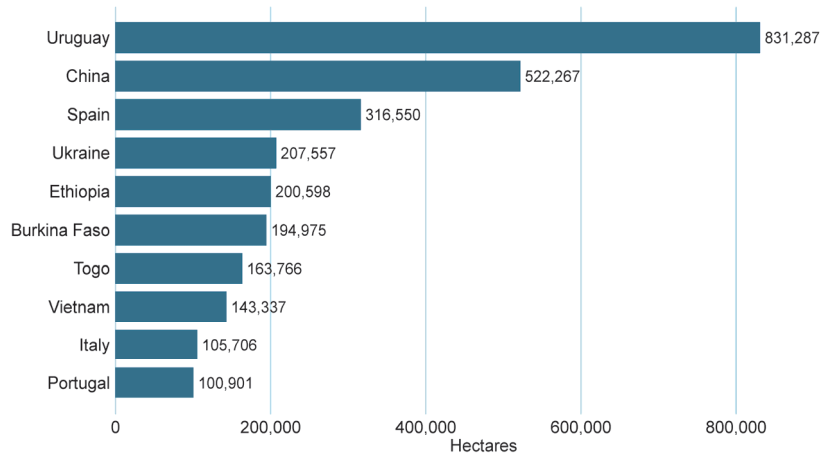


Figure 6: World: The ten countries with the highest increase of organic agricultural land 2023

Source: FiBL survey 2025, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 333.

Further organic areas

Apart from land dedicated to organic agriculture, there are further areas of organic land dedicated to other activities. The largest part of these are wild collection areas and areas for beekeeping. Further non-agricultural areas include aquaculture, forests, and grazing areas on non-agricultural land. These areas totalled 32.0 million hectares, and all the organic areas together summed up to 130.9 million hectares.

It should be noted that many countries do not report non-agricultural organic areas. We can, therefore, assume that the data on the other areas are incomplete.

For organic aquaculture and beekeeping, other indicators (production and number of beehives) are more relevant than the area, and the significance of organic aquaculture and beekeeping cannot be measured in hectares (Table 47). While some area data on aquaculture are available, it should be noted that it is not complete.

For more information on aquaculture and beekeeping, see pages 61 and 62. More information on the use of the wild collection areas is available in the corresponding chapter, page 59.

World: Distribution of all organic areas in 2023

Source: FiBL survey 2025

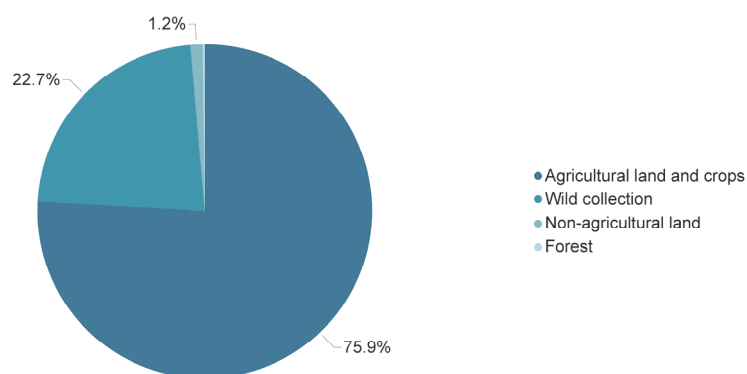


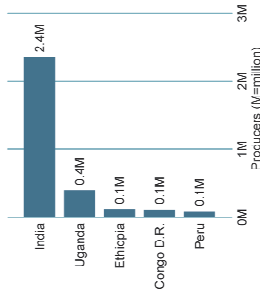
Figure 7: World: Distribution of all organic areas 2023. Total: 130.9 million hectares

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

WORLD: ORGANIC PRODUCERS 2023



The countries with the most organic producers were India, Uganda, Ethiopia and Congo D.R.

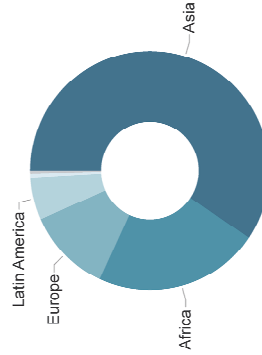


The five countries with the most organic producers 2023

FIBL www.fibl.org



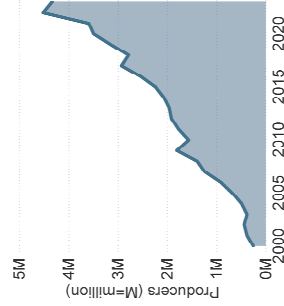
More than 92% of the producers were in Asia, Africa and Europe.



Distribution of organic producers by region 2023



There has been a decrease in the number of producers by more than 181,000 or 4.0% between 2022-2023. (Mainly due to a decrease in India and Thailand).



Development of the number of organic producers 2000-2023

Source: FIBL 2025 www.organic-world.net - statistics.fibl.org

Infographic 3: Organic producers 2023

Source: FIBL survey 2025

Organic producers and other operator types

Producers

There were more than 4.3 million organic producers worldwide in 2023.

- According to the data obtained, more than 93 percent of the producers were in Asia, Africa, and Europe (Table 2, Figure 8).
- The country with the most organic producers was India, followed by Uganda and Ethiopia.
- There has been a decrease in the number of producers of nearly 182'000, or 4.0 percent, compared to 2022. In Europe and Northern America, the number of producers increased. In Africa, Asia, Latin America and Oceania there was a decrease in 2023 (Table 2).

Reporting 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 many individual producers;
- do not provide data on the number of producers at all;
- include collectors in case there are wild collection areas, and
- 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 2: World: Development of the numbers of producers by region in 2023

Region	2022 [no.]	2023 [no.]	1-year growth [no.]	1-year growth [%]	10-year growth [no.]	10-year growth [%]
Africa	982'761	971'665	-11'096	-1.1%	388'671	66.7%
Asia	2'725'943	2'578'428	-147'515	-5.4%	1'858'976	258.4%
Europe	487'712	494'624	6'912	1.4%	157'158	46.6%
Latin America	270'388	249'095	-21'293	-7.9%	-139'148	-35.8%
Northern America	23'948	24'196	248	1.0%	7'134	41.8%
Oceania	24'466	15'575	-8'891	-36.3%	-6'540	-29.6%
World	4'514'450	4'332'500	-181'950	-4.0%	2'265'168	109.6%

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Figures and Tables

- Figures on organic operators can be found on the following pages.
- Tables with operator data per country can be found from page 279.

World: Distribution of organic producers by region 2023

Source: FiBL survey 2025

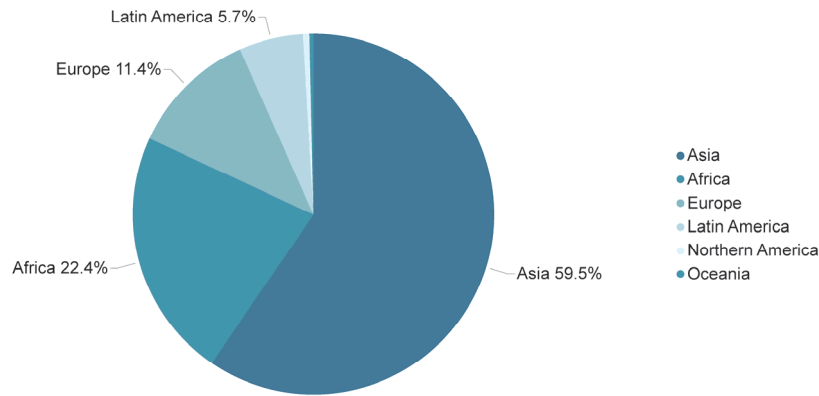


Figure 8: World: Distribution of organic producers by region 2023 (Total: 4.3 million producers)

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: The ten countries with the most organic producers 2023

Source: FiBL survey 2025

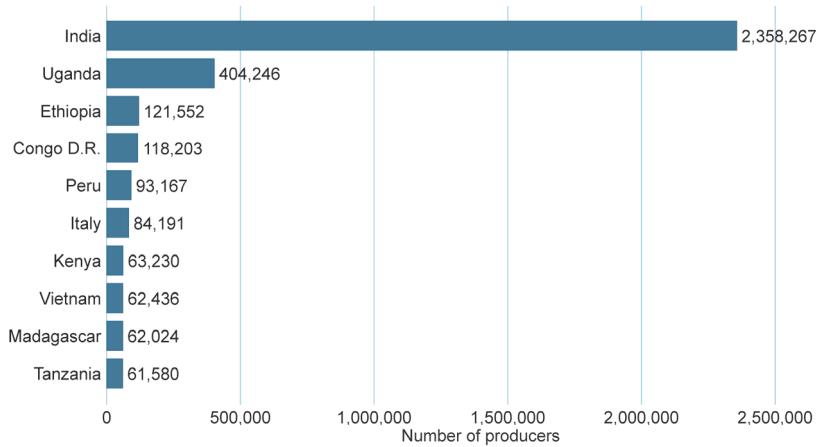


Figure 9: World: The ten countries with the most organic producers 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 3: World: Organic producers, processors, importers and exporters by region in 2023

Region	Producers	Processors	Importers	Exporters
Africa	971'665	1'713	17	1'148
Asia	2'578'428	12'698	776	1'213
Europe	494'624	94'627	7'955	5'524
Latin America	249'095	20'700	1'691	1'190
Northern America	24'196	1'953	17	
Oceania	15'575	1'746		126
Total	4'332'500	133'286	10'439	9'201

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

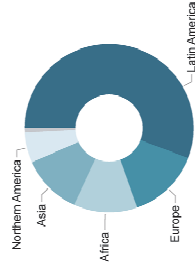
Further operator types

Regarding data on further operator types, there are over 130'000 processors and approximately 10'400 importers, most of them 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 what is indicated in Table 3. Further operator types reported but not listed here were beekeepers, smallholder groups, and aquaculture enterprises, as well as the number of collectors (wild collection).

EU AND US ORGANIC IMPORTS 2023



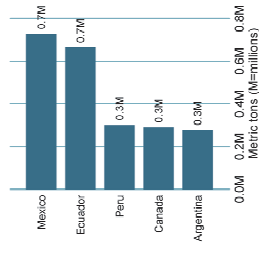
While the European Union imported nearly 2.5 million MT, the US imported almost 2.8 million MT. By region, Latin America had the lead in export (2.9 million MT) followed by Europe (0.7 million MT) and Africa (0.6 million MT).



Distribution of organic imports to the EU & US by region 2023



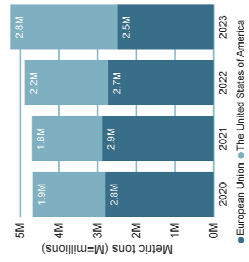
The country with the largest export volume was Mexico, followed by Ecuador and Peru.



The five countries with the largest organic exports to EU & US in 2023



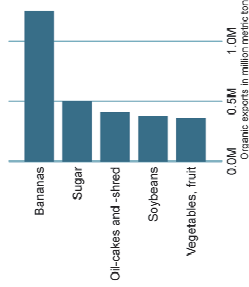
Organic imports into the US* increased by 29%, and decreased by 9% to the European Union.



Growth of imports in MT by region



The top commodities were bananas (1.25 million MT), sugar (0.50 million MT) and oil-cakes and -shred (0.41 million MT).



Top 5 commodities imported into The EU & US in 2023

*US organic imports: selected commodities only



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Source: FiBL 2025, www.organic-world.net - statistics.fibl.org

Infographic 4: EU and US organic imports 2023

Source: FiBL survey 2023

International Trade

International trade data is becoming available for more and more countries. These can be expressed in metric tons or as values. Import data were not available for many countries, but since 2018, the European Union (EU) has collected import data; these are available on page 282. Data on US organic imports (values and quantity) are available on the USDA website.

Please note the US organic import data do not cover all commodities.

Table 4: World: Organic imports to the European Union and US by region 2023

Exporting region	Import destination	2023 exports [MT]	1-year growth [MT]	1-year growth [%]
Africa	Export to EU	430'663	-52'772	-10.9%
	Export to USA	207'896	136'101	189.6%
Africa total		638'560	83'329	15.0%
Asia	Export to EU	473'920	-79'797	-14.4%
	Export to USA	131'693	71'027	117.1%
Asia total		605'614	-8'770	-1.4%
Europe	Export to EU	432'363	7'210	1.7%
	Export to USA	293'354	8'390	2.9%
Europe total		725'718	15'600	2.2%
Latin America	Export to EU	1'098'637	-118'074	-9.7%
	Export to USA	1'826'564	283'884	18.4%
Latin America total		2'925'201	165'810	6.0%
Northern America	Export to EU	34'575	4'499	15.0%
	Export to USA	269'331	76'412	39.6%
Northern America total		303'905	80'911	36.3%
Oceania	Export to EU	9'160	-8'522	-48.2%
	Export to USA	35'312	19'436	122.4%
Oceania total		44'472	10'914	32.5%
Total exports to EU and US		5'243'469	347'793	7.1%
Total exports to EU		2'479'319	-247'456	-9.1%
Total exports to US		2'764'150	595'249	27.4%

Source: TRACES/European Commission, GATS/USDA, compiled by FiBL

– More than 5.2 million metric tons of organic products were imported into the EU and USA in 2023

While the European Union imported 2.5 million metric tons of organic products, the United States imported 2.8 million metric tons. In 2023, EU and US organic imports saw an increase of 7.1 percent, totalling almost 348'000 metric tons.

However, it's worth noting that total exports to the European Union decreased by 247'456 metric tons, marking a decline of 9.1 percent. In contrast, total exports to the United States saw a significant increase of 595'249 metric tons, representing a 27.4 percent growth.

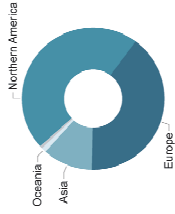
- **Mexico was the largest exporter**
The largest exporters to the EU and US in 2023 were Mexico (728'632 metric tons), Ecuador (665'483 metric tons) and Peru (302'826 metric tons).
- **Large increase in export volume from Mexico, Türkiye, and Canada**
Mexico (+192'904 metric tons, +36.0 percent), Türkiye (+96'489 metric tons, +58.6 percent), and Canada (+77'710 metric tons, +36.3 percent) increased their exports to the EU and US the most.
- **Significant decline in imports from Ukraine, Dominican Republic and Paraguay**
Between 2022/2023, imports of organic products into the EU and US decreased the most from Ukraine (-89'848 metric tons, -32.9 percent), Dominican Republic (-59'981 metric tons, -23.5%) and Paraguay (-44'619 metric tons, -41.4 percent).
- **Bananas, sugar and oilcakes – the top three most imported products**
Bananas, sugar and oilcakes accounted for 41 percent of total imports of organic commodities in 2023. Bananas were imported at 1'250'628 metric tons, sugar at 500'733 metric tons, and oilcakes at 408'874 metric tons.
- **Increase for vegetables and oilcakes**
Among the top groups, the largest increase was observed in the category of fresh vegetables, where most of the increases was for vegetables from Mexico that were exported to the United States (+188'505 metric tons, + 108 percent), and oil-cakes and -shred (+185'776 metric tons, + 83 percent, mainly soybean oilcakes from China, Togo, India and Ethiopia). On the other hand, decreases were observed for oilseeds, mainly soybeans from Ukraine, Argentina and Togo (-150'653 metric tons, a 28 percent decrease), oats (-44'775 metric tons, a 50.8 percent decrease mainly from Estonia and Canada), and cocoa (-16'577 metric tons, a 23 percent decrease)
- **The US, the Netherlands and Germany are the biggest importers**
Around 81 percent of organic commodities are imported through the top three importing countries into the EU and the US. In 2023, the US imported 2.8 million metric tons, which accounted for 53 percent of all EU/US organic imports. The Netherlands imported 0.8 million metric tons (15 percent), followed by Germany with 0.42 million metric tons (8 percent). It's worth noting that in the case of the Netherlands, a significant portion of the imports is further redistributed.

For detailed data on international trade, please refer to the tables provided in the Annex, section 1.4 International Trade

WORLD: ORGANIC RETAIL SALES 2023



The largest single market was the USA with 59.0 billion (bn) €, followed by the European Union (46.5 bn €). By region, Northern America had the lead (63.9 bn €), followed by Europe (54.7 bn €) and Asia (15.5 bn €).

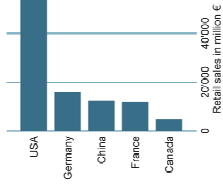


Distribution of retail sales by region 2023

FIBL www.fibl.org



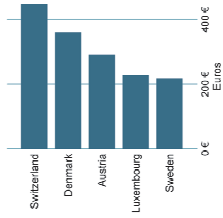
The countries with the largest markets for organic food were the USA with 59.0 billion (bn) €, Germany (16.1 bn €), China (12.6 bn €) and France (12.1 bn €).



The five countries with the largest markets for organic food in 2023



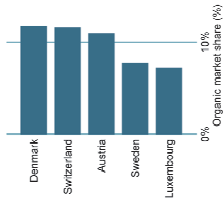
Switzerland had the highest per capita consumption worldwide, followed by Denmark, Austria, Luxembourg and Sweden.



Top five countries with the highest per capita consumption 2023



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



The five countries with the highest organic shares of the total market in 2023

Source: FIBL 2025 www.organic-world.net - statistics.fibl.org

Infographic 5: Organic retail sales 2023

Source: FIBL survey 2025

Retail sales¹

Whereas Amarjit Sahota presents global trends for the organic market along with much background information (page 102), in this chapter, we show the country-related market data that was compiled under the framework of the FiBL survey on organic agriculture. Please note that due to fluctuation exchange rates a direct year-to-year comparison is often not possible.

Data on total retail sales value was available for 44 countries (about one-quarter of the total countries with organic data), which means that for many countries with organic farming activities, such data is missing.

- Total retail sales, amounted to **almost more than 136 billion euros in 2023**.
- The country with the **largest market for organic food was the United States** (59.0 billion euros), followed by Germany (16.1 billion euros), China (12.6 billion euros) and France (12.1 billion euros).
- The **largest single market was the United States**, followed by the European Union (46.5 billion euros) and China (12.6 billion euros).
- **By region, North America had the lead** (63.9 billion euros), followed by Europe (54.7 billion euros) and Asia (15.5 billion euros) (Figure 11).
- Market growth was noted in 11 countries for which 2023 data were available. The strongest market growth was observed in the Estonia (+13.0 percent), Netherlands (+12.5 percent), and Belgium (+9.0 percent). For the first time since 2017, India provided an update on its organic market data.
- Whereas the highest per capita consumption by region was in Northern America (170.4 euros), by country, it was highest in Europe. In 2023, **Switzerland had the highest per capita consumption** (468 euros) worldwide, followed by Denmark (362 euros), Austria (292 euros) and Luxembourg (228 euros).
- Looking at the **shares the organic market has of the total market, the leader is Denmark** (11.8 percent), followed by Switzerland (11.6 percent) and Austria (11.0 percent).

For detailed data on global retail sales, please refer to the tables provided in the Annex, section 1.5 Organic Retail Sales, page 285.

¹ Please note that due to differences in the methodology, some of the figures presented in this chapter differ from those collected in by Ecovia Intelligence (see chapter by Amarjit Sahota).

Table 5: Global market data: Retail sales and per capita consumption by region 2023

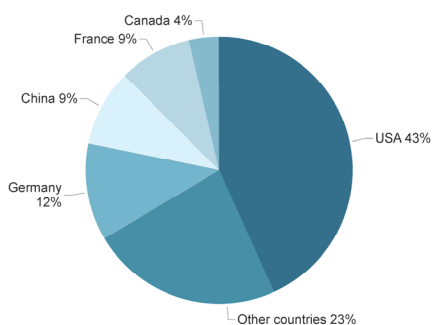
Region	Retail sales [Million €] ¹	Per capita consumption [€]
Africa	No data	No data
Asia	15'471	3.3
Europe	54'749	66.0
Latin America*	778	
Northern America	63'920	167.0
Oceania	1'510	33.9
Total	136'430	17.0

Source: FiBL-AMI survey 2025, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 333.

*Data from Belize, Brazil, Chile, Jamaica, Mexico, and Peru only, some of which have not been updated for several years.

Global market for organic food: Distribution of retail sales by country 2023

Source: FiBL-AMI survey 2025, based on retail sales with organic food



Global market for organic food: Distribution of retail sales by region 2023

Source: FiBL-AMI survey 2025, based on retail sales with organic food

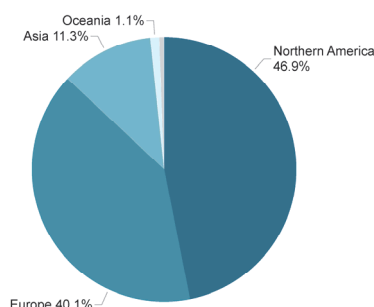


Figure 10: Global market for organic food: Distribution of retail sales by country 2023

Figure 11: Global market for organic food: Distribution of retail sales by region 2023

Source: FiBL-AMI survey 2025, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 333.

¹ According to the Central European Bank, 1 euro corresponded to 1.0813 US dollars in 2023.

World: The countries with the largest markets for organic food 2023

Source: FiBL-AMI survey 2025

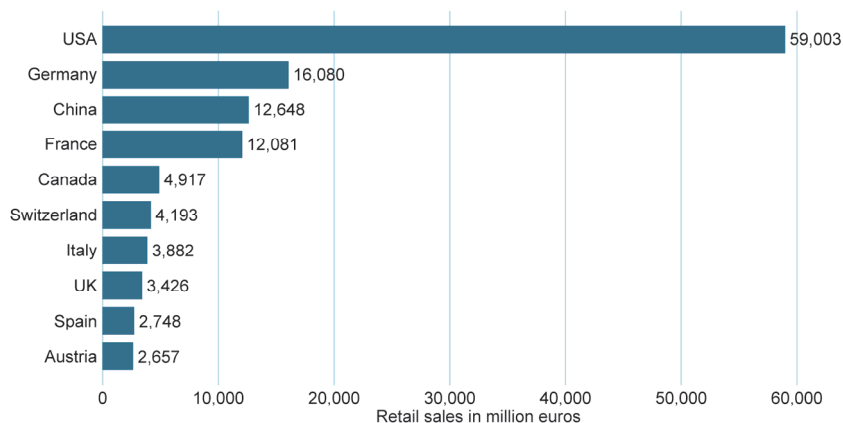


Figure 12: Global market: The countries with the largest markets for organic food 2023

Source: FiBL-AMI survey 2025, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 333.

World: The ten countries with the highest per capita consumption 2023

Source: FiBL-AMI survey 2025

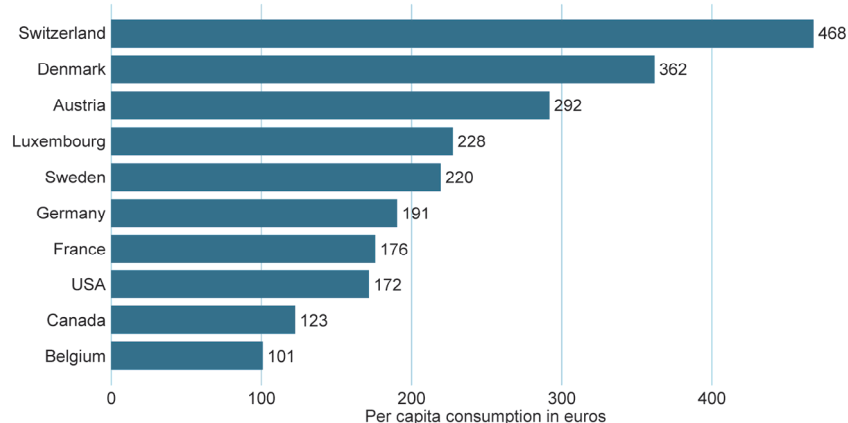


Figure 13: Global market: The ten countries with the highest per capita consumption 2023

Source: FiBL-AMI survey 2025, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 333.

Organic farming in developing countries and emerging markets

The Development Assistance Committee (DAC) of the Organisation for Economic Co-operation and Development (OECD) is a forum to discuss issues surrounding aid, development and poverty reduction in developing countries. The recipients of Official Development Assistance (ODA) according to the DAC list¹ are studied in this section.

- More than 3.8 million organic producers from the countries on this list were counted (88 percent of all organic producers).
- About a fifth of the world's organic agricultural land, 19.8 million hectares, is located in countries on this list.
- Almost half, 46 percent of the agricultural land of the countries on the DAC list is located in Asia (9.0 million hectares), with Latin America (6.4 million) and Africa (3.4 million) in second and third place.
- The countries with the largest areas of organic agricultural land are India, Argentina, China and Brazil, in that order. Not surprisingly, all of them are large countries (Figure 14).
- However, when it comes to organic agricultural land as a percentage of the total area under cultivation, the order is different. The countries on the DAC list with the highest percentages of organic agricultural land are São Tomé and Príncipe (22.1 percent), Samoa (14.6 percent) and Dominica (11.6 percent). India was the country with the largest area under organic cultivation (with 4.5 million hectares and 2.5 percent area share). The organic area shares of the total agricultural land of the top ten countries on the DAC list are comparable to that of many European countries, and the high organic shares can be attributed in part to a high production potential for, and focus on, exports. Support activities may also play a role. However, of the countries on the DAC list, only about a 30 percent have an organic share higher than 1 percent of the total agricultural area (Figure 15).
- Land use details were available for more than 72 percent of the agricultural land of the countries on the DAC list; crop data is missing for some of the world's largest producing countries (India and Brazil). Available statistics show that organic arable land areas constituted nearly 33 percent of the organic agricultural land, organic grassland/grazing almost 19 percent, and organic permanent crops more 20 than percent.
- Exports play an important role; organic exports from the countries on the DAC list comprise 88% of the total organic exports to the EU and US. The most important crops (in metric tons) are bananas, sugar, oilcakes, soybeans, vegetables and coffee. For Africa, soybeans, oil-cakes and -shred (mainly soybean), vegetable oils (mainly olive oil) and bananas, for Asia, oil-cakes and-shred, rice and sugar, and for Latin America, bananas, sugar, vegetables, and coffee are the most important crops.

¹ The country list of the Development Assistance Committee DAC is available on the OECD website at <http://www.oecd.org/dac/stats/daclist.htm>

Table 6: Countries on the DAC list¹: Development of organic agricultural land 2013-2023

Region	Organic area 2013 [ha]	Area share 2013 [%]	Organic area 2018 [ha]	Area share 2018 [%]	Organic area 2023 [ha]	Area share 2023 [%]
Africa	1'201'344	0.1	1'816'755	0.2	3'400'750	0.3
Asia	3'305'977	0.1	6'160'344	0.4	9'029'297	0.6
Europe	892'261	0.5	1'002'419	1.2	870'002	1.2
Latin America	5'351'210	0.4	5'340'425	0.8	6'449'165	0.9
Oceania	62'491	1.5	221'073	11.1	78'716	4.0
Total	10'813'283	0.2	14'541'016	0.4	19'827'930	0.6

Source: FiBL surveys 2012-2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2023

Source: FiBL survey 2025

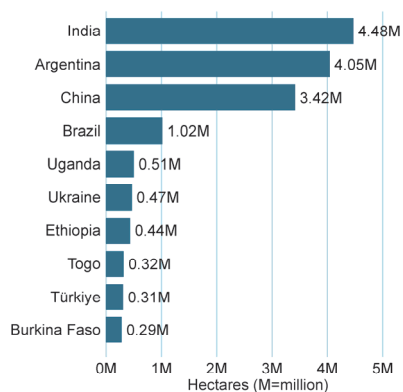


Figure 14 (left): Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2023

Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2023

Source: FiBL survey 2025

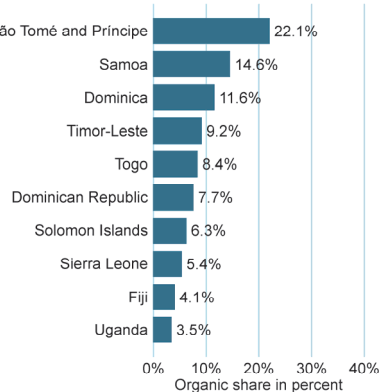


Figure 15 (right): Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

¹ The development is displayed for all countries, which are on the current DAC list. The data is not comparable to those previously published, as there were changes in the list.

Land use and key commodities in organic agriculture

Land use

General land use information was available for 92 percent of the organic agricultural land; however, this does not mean detailed crop information is available for all areas as not all countries (e.g. Brazil and India) provided detailed crop data.^{1,2}

More than two-thirds of the 98.9 million hectares of organic agricultural land in 2023 were grassland/grazing areas (over 68.5 million hectares). The cropland area (arable land with 16.2 million hectares and permanent crops with 6.7 million hectares) constituted 22.9 million hectares, which was less than a quarter of the organic agricultural land (Table 7).

The land use information by geographical region is summarized in Figure 16 and Table 7. While in Oceania and Latin America, permanent grassland/grazing covers a large part of the organic farmland area, in Africa, permanent crops are the most important land use type. In Asia, Europe and North America, arable land is the most important.

Table 7: World: Land use in organic agriculture by 2023

Land use	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	Northern America [ha]	Oceania [ha]	World [ha]
Arable land crops	1'374'877	4'040'433	8'446'680	617'986	1'623'433	51'472	16'154'882
Permanent crops	1'936'482	1'129'179	2'461'340	853'823	272'312	42'071	6'695'208
Permanent grassland	16'460	6'185	7'845'128	7'586'327	517'675	52'540'881	68'512'656
Total	3'403'319	9'137'495	19'457'600	10'347'833	3'349'255	53'178'651	98'865'120

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333. Total includes areas for which no further details were available.

The key arable crops were cereals, green fodder from arable land and oilseeds. For permanent crops, nuts, coffee and olives were the most relevant (Figure 17, Table 8, Table 9). For details, see section on arable and permanent crops on the following pages. All three main land use types increased between 2022 and 2023. The arable crops increased by 6.9 percent, permanent crop by 8.5 percent, and organic grassland/grazing areas by 1.2 percent (Figure 18).

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.

² The FAO classification 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. 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), permanent grassland/grazing areas, other agricultural areas (such as hedges) and agricultural land for which no details were available at all. Aquaculture, forest, and grazed non-agricultural land were distinguished from "agricultural land" with a separate category, as were organic wild collection areas and beekeeping areas.

For more details, see the FAOSTAT homepage, [faostat.fao.org: Home > Concepts and Definitions > Glossary](https://www.fao.org/faostat/en/#home), or <https://www.fao.org/faostat/en/#home>

World: Distribution of main land use types by region 2023

Source: FiBL survey 2025

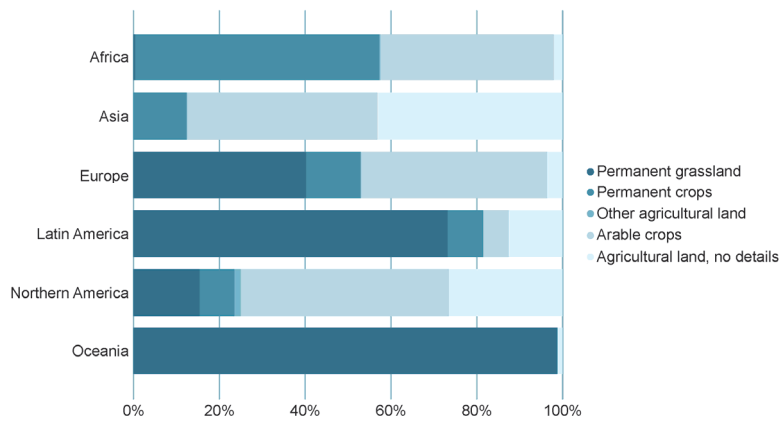


Figure 16: World: Distribution of main land use types by region 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: Distribution of main land use types and key crop categories 2023

FiBL survey 2025, based on information from the private sector, certifiers, and governments.

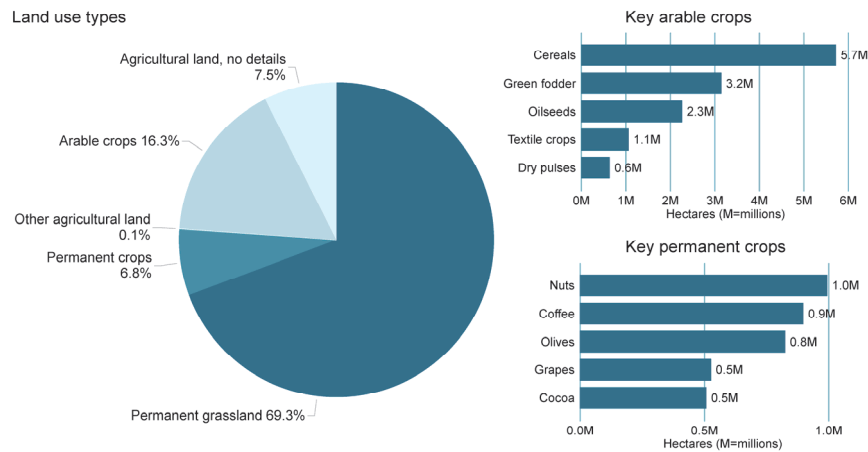


Figure 17: World: Distribution of main land use types and key crop categories 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004 - 2023

Source: FiBL-IFOAM-SOEL surveys 2006-2025

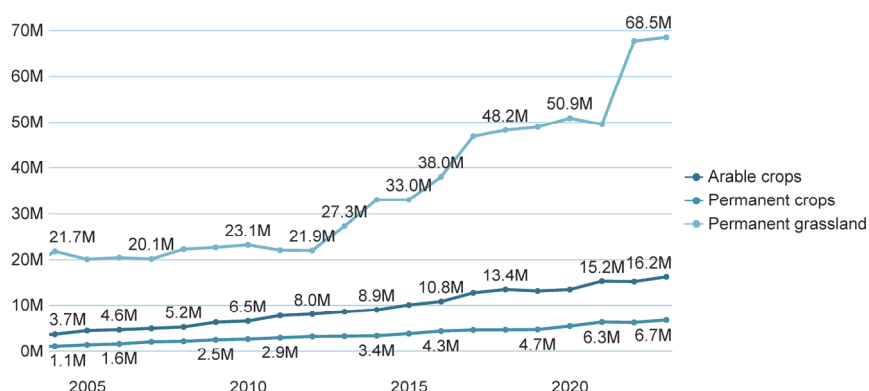


Figure 18: World: Development of organic farmland by land use 2004-2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Arable land

With a total of nearly 16.2 million hectares, organic arable land constituted 16.3 percent of the world's organic agricultural land and 1.2 percent of the world's arable cropland. Compared to 2022, organic arable land increase by 6.9 percent.

More than 52 percent of the arable land was located in Europe, followed by Asia (25 percent) and Northern America (10 percent) (Figure 19). Most of the arable cropland was used for cereals (including rice, 5.7 million hectares), green fodder (3.2 million hectares) and oilseeds (2.3 million hectares) (Figure 20 and Table 8).

Permanent crops

Permanent crops accounted for more than 6.7 million hectares, which is 3.8 percent of the world's permanent cropland. Compared with 2022, an increase of more than 523'000 hectares, or 8.5 percent, was reported.

Seven percent of the organic agricultural land was permanent cropland.

Most of the permanent cropland was in Europe (almost 2.5 million hectares), followed by Africa (over 1.9 million hectares) and Asia (almost 1.1 million hectares) (Figure 21; Figure 22 and Table 9).

Table 8: Use of organic arable land 2014, 2022 and 2023 compared

Crop group	Organic area 2023 [ha]	Share of total 2023 [%]	1-year change [ha]	1-year change [%]	10-year change [ha]	10-year change [%]
Cereals	5'730'109	0.8	78'723	1.4	2'376'185	70.8
Plants harvested green	3'154'059	7.3	-165'386	-5.0	640'419	25.5
Oilseeds	2'273'717	0.9	449'008	24.6	1'320'896	138.6
Textile crops	1'510'323	329.1	496'386	49.0	1'305'711	638.1
Dry pulses	1'070'769	3.1	30'341	2.9	808'783	308.7
Fresh vegetables	645'403	0.7	-82'227	-11.3	275'620	74.5
Medicinal / aromatic plants	552'702	1.0	34'467	6.7	254'047	85.1
Industrial crops	231'747	103.1	214'650	1'255.5	209'497	941.6
Total	16'154'882	1.2	1'037'520	6.9	7'230'255	81.0

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Total includes unspecified arable land. For detailed data sources, see annex, page 333.

Table 9: Use of organic permanent cropland 2014, 2022 and 2023 compared

Crop group	Organic area 2023 [ha]	Share of total 2023 [%]	1-year change [ha]	1-year change [%]	10-year change [ha]	10-year change [%]
Nuts	995'512	6.2	108'926	12.3	718'950	260.0
Coffee	899'280	7.4	191'465	27.1	138'101	18.1
Olives	825'896	7.5	-26'752	-3.1	198'888	31.7
Grapes	527'871	7.8	-33'728	-6.0	211'908	67.1
Cocoa	508'814	4.3	-6'254	-1.2	259'619	104.2
Fruit, tropical / subtropical	355'691	1.3	83'781	30.8	129'418	57.2
Coconut	300'017	2.7	34'472	13.0	192'583	179.3
Fruit, temperate	282'735	2.4	-32'124	-10.2	94'429	50.1
Tea/mate, etc.	268'149	4.8	-255	-0.1	199'123	288.5
Medicinal / aromatic plants	161'870	7.0	-62'150	-27.7	132'908	458.9
Citrus fruit	138'899	1.3	23'553	20.4	67'283	93.9
Berries	90'757	14.7	2'182	2.5	37'5545	70.6
Total	6'695'208	3.8	523'437	8.5	3'335'613	99.3

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Total includes unspecified permanent cropland. For detailed data sources, see annex, page 333.

Table 10: Use of organic arable and permanent cropland 2014, 2022 and 2023 compared

Crop group	Organic area 2023 [ha]	Share of total 2023 [%]	1-year change [ha]	1-year change [%]	10-year change [ha]	10-year change [%]
Arable & permanent crops	22'850'090	1.5	1'560'957	7.3	10'565'149	86.0

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: Distribution of organic arable cropland by region 2023

Source: FiBL survey 2025

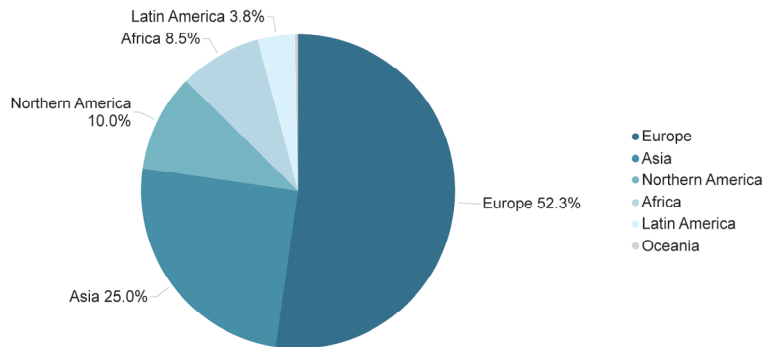


Figure 19: World: Distribution of organic arable cropland by region 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: Distribution of organic arable cropland by crop group 2023

Source: FiBL survey 2025

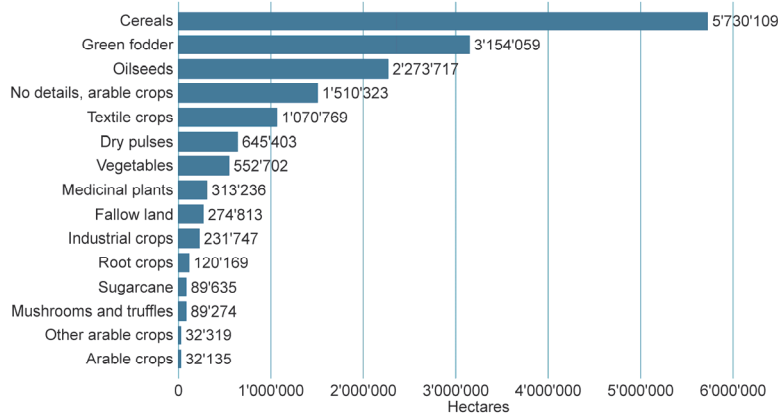


Figure 20: World: Use of arable cropland by crop group 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: Distribution of organic permanent cropland by region 2023

Source: FiBL survey 2025

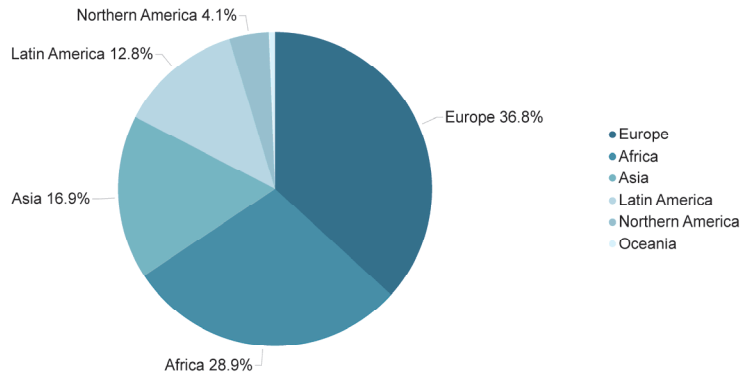


Figure 21: World: Distribution of permanent cropland by region 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

World: Distribution of organic permanent cropland by crop group 2023

Source: FiBL survey 2025

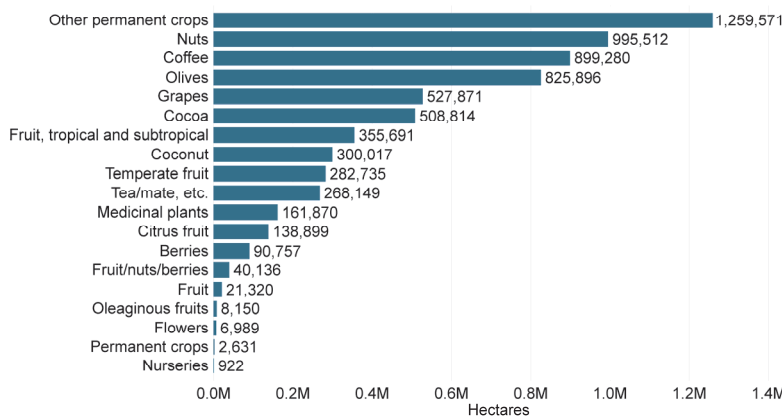


Figure 22: World: Use of permanent cropland by crop group 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Wild collection and beekeeping areas

The collection of wild-harvested crops is defined in the IFOAM Norms (IFOAM 2014), and wild collection activities are regulated by organic laws. A collection area (including beekeeping) of 30.2 million hectares was reported in 2023. The organic wild collection areas are concentrated in Europe, Africa, Asia and Latin America (Figure 23 and Table 11); 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 China and India (Figure 24). Nuts and medicinal and aromatic plants play the most important role (Table 12). Unfortunately, no details were available for most of the wild collection areas.

Table 11: Wild collection and beekeeping areas by region 2022 and 2023 compared

Region	2022 [ha]	2023 [ha]	Change 2022-2023 [ha]	Change 2022-2023 [%]
Africa	10'711'903	7'895'019	-2'816'883.8	-26.3
Asia	7'076'296	6'219'414	-856'881.7	-12.1
Europe	11'146'603	10'616'871	-529'732.3	-4.8
Latin America	5'134'862	5'340'704	205'842.1	4.0
Northern America	163'942	160	-163'781.8	-99.9
Oceania	66'497	148'913	82'415.2	123.9
Total	34'300'104	30'221'082	-4'079'022.3	-11.9

Source: FiBL survey 2025, based on data from governments, the private sector, and certifiers. For detailed data sources, see annex, page 333.

Table 12: Wild collection and beekeeping areas by crop group 2022 and 2023

Land use/Product	Area [ha] 2022	Area [ha] 2023
Bee pastures	2'512'869	2'502'749
Berries, wild collection	745'604	316
Coffee, wild collection	7'956	
Forest products	2'000	358'813
Fruit, wild collection	178'711	248'577
Marula, wild collection	78'349	160
Medicinal and aromatic plants, wild collection	3'101'048	778'530
Mushrooms, wild collection	50'088	1'200
Nuts, wild collection	5'015'535	4'595'035
Oil plants, wild collection	1'514	1'514
Palmito, wild collection	56'649	53'449
Permanent crops, wild collection, other	15'139	15'833
Rose hips, wild collection	1'042'535	287'865
Seaweed	325'261	211'328
Wild collection, no details	21'173'167	21'166'466
Total	34'300'104	30'221'082

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. The total includes areas for which no details were available. For detailed data sources, see annex, page 333. Please be aware that some countries may experience double counting of areas

For detailed data on wild collection and beekeeping areas, please refer to the tables provided in the Annex, section 1.6 Use of organic areas: Wild collection, beehives, aquaculture and crops, page 287.

World: Distribution of organic wild collection and beekeeping areas by region in 2023

Source: FiBL survey 2025

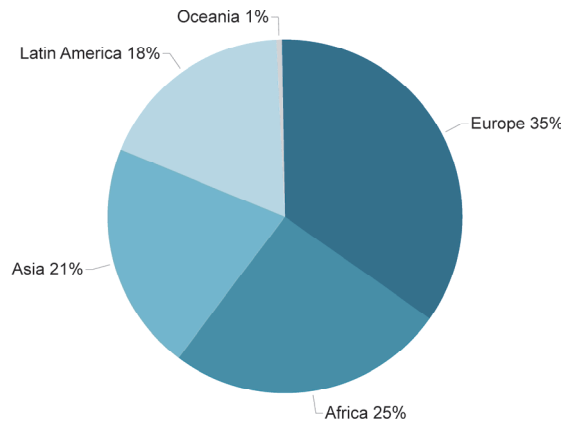


Figure 23: World: Distribution of organic wild collection and beekeeping areas by region in 2023

Source: FiBL survey 2025, based on data from government bodies, the private sector and certifiers. For detailed data sources, see annex, page 333.

World: The ten countries with the largest organic wild collection and beekeeping areas in 2023

Source: FiBL survey 2025

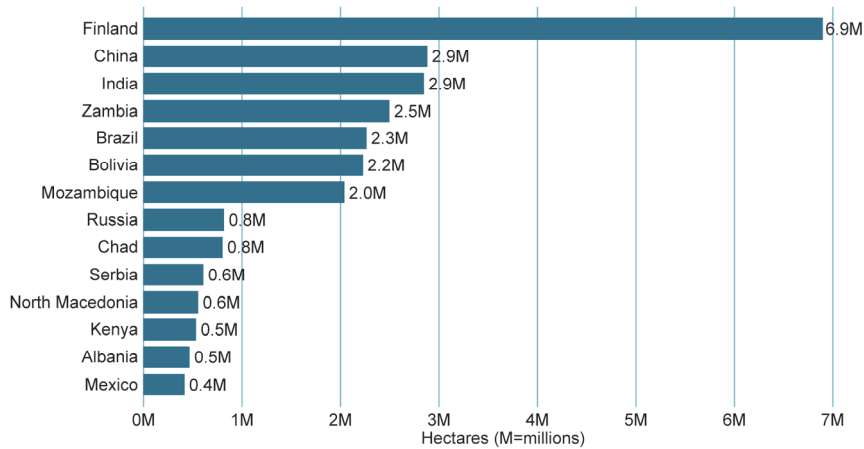


Figure 24: World: The ten countries with the largest organic wild collection and beekeeping areas in 2023

Source: FiBL survey 2025, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 333. Please be aware that some countries may experience double counting of areas.

Beehives

There were almost 2.5 million organic beehives in 2023, representing 2.4 percent of the world's beehives.¹ Organic beehives are concentrated in Europe (43.2 percent), Africa (32.3 percent), and Latin America (23.7 percent) (Figure 25). The countries with the largest number of organic beehives was Mexico (over 475'000) and Bulgaria (more than 232'000) (Figure 25). The total number has increased almost five-fold since 2007, when over 541'000 beehives were reported.

One of the main challenges for new organic beekeepers is the conversion process due to the lack of access to knowledge on organic beekeeping practices and the organic certification process. Furthermore, the production of good quality organic honey and the control of the Varroa parasite with organic methods are major obstacles for organic beekeepers.

World: Distribution of organic beehives by region in 2023

Source: FiBL survey 2025

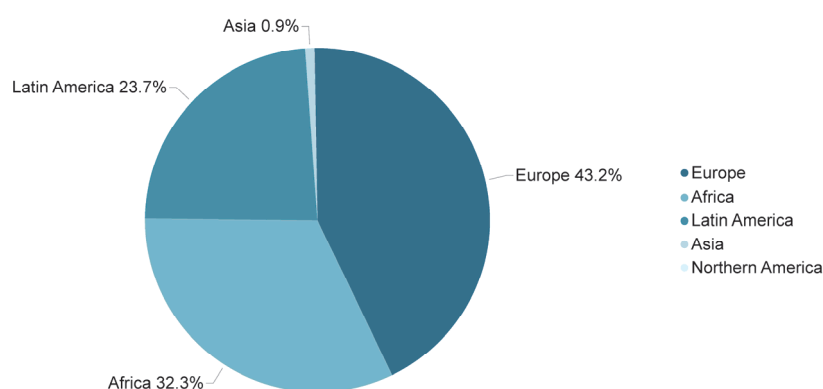


Figure 25: World: Distribution of organic beehives by region in 2023

Source: FiBL survey 2025, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 333.

¹ According to FAO, there were 102'058'674 beehives in 2023. The FAOSTAT website > Production > Live animals at <http://www.fao.org/faostat/en/#data/QA>

Aquaculture

A production volume of more than 510'000 metric tons of organic aquaculture was reported in 2023.

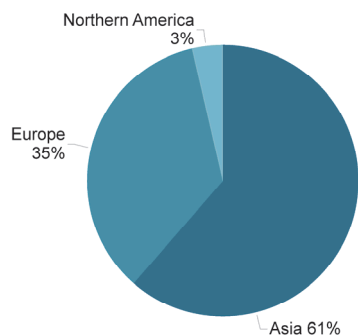
- According to the available data, aquaculture production is evenly divided between Asia (61 percent, mainly in China) and Europe (35 percent, mainly in Norway, Ireland, Italy, and Netherlands).
- The largest production volume was found in China (313'168 metric tons; however, without breakdown by species), followed by Norway (54'111 metric tons) (Table 47 and Figure 26).

Unfortunately, some countries with large aquaculture production, such as Brazil and Indonesia, did not provide data on organic aquaculture; so it can be assumed that the organic aquaculture production volume is higher.

A breakdown by species was available for one-fourth of the total production. According to the available data, organic mussels are the most produced species (54'806 metric tons), followed by salmon (50'245 metric tons) and sea bass (4'027 metric tons) (Table 46).

World: Organic aquaculture production volume: Distribution by continent 2023

Source: FiBL survey 2025



World: The ten countries with the largest aquaculture production volume 2023

Source: FiBL survey 2025

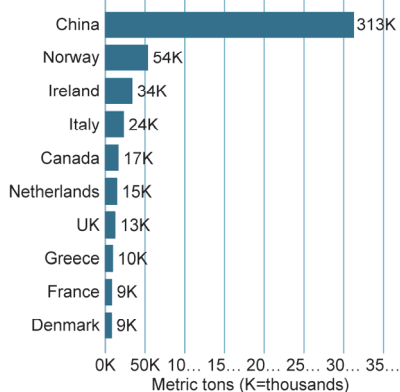
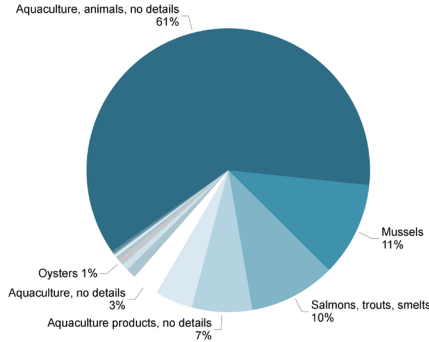


Figure 26: World: Organic aquaculture production volume: Distribution by region and top 10 countries 2023

Source: FiBL-survey 2025; based on national data sources and certifier data. For detailed data sources, see annex, page 333.

World: Organic aquaculture production volume: Distribution by species 2023

Source: FiBL survey 2025



World: Key organic aquaculture species by production volume 2023

Source: FiBL survey 2025

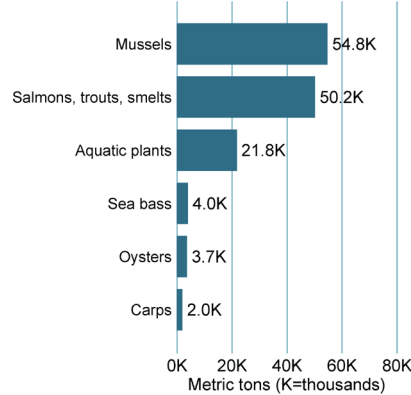


Figure 27: World: Organic aquaculture production volume: Distribution by species and key species 2023

Source: FiBL-survey 2025; based on national data sources and certifier data. For detailed data sources, see annex, page 332.

References and further reading

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Statistics on selected crops

In this section, some of the data on key crops and crop groups is presented, including the area under organic management compared with the total area of the crops. 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 mainly compared with the **area harvested as provided by FAO and Eurostat**. The data may not necessarily be directly comparable to the areas sown or planted as registered by the certification bodies.

Changes in the Eurostat data collection system have significantly impacted the reporting of European crop figures; for details see Box 1 on page 183.

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. In those cases where the certifiers did not include information status, we assumed that land was fully converted. The tables presented in this section are only part of the information available in the FiBL crop database, which is available at statistics.fibl.org.

Furthermore, at www.organic-world.net slides on key crops are available.

Table 13: World: Selected key crop groups and crops area in organic agriculture 2023 (overview including conversion areas)

Crop	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	33'649	1'974'177	2'806'870	182'461	691'660	41'293	5'730'109
Citrus fruit	9'126	13'394	56'431	54'467	5'477	5	138'899
Cocoa	316'242	1'409		187'678		3'485	508'814
Coffee	461'511	72'401	0	363'721	196	1'451	899'280
Dry pulses	8'807	18'730	549'629	14'218	54'019		645'403
Fruit temperate	6'751	112'327	134'345	10'320	18'992		282'735
Fruit, tropical/ subtropical	125'460	59'716	41'571	124'652	4'112	179	355'691
Grapes	6'100	19'164	456'958	21'414	18'453	5'783	527'871
Oilseeds	694'363	720'451	618'430	68'819	171'654		2'273'717
Olives	157'780	7'260	647'880	12'310	666		825'896
Vegetables	40'659	103'997	233'858	59'968	110'210	4'010	552'702

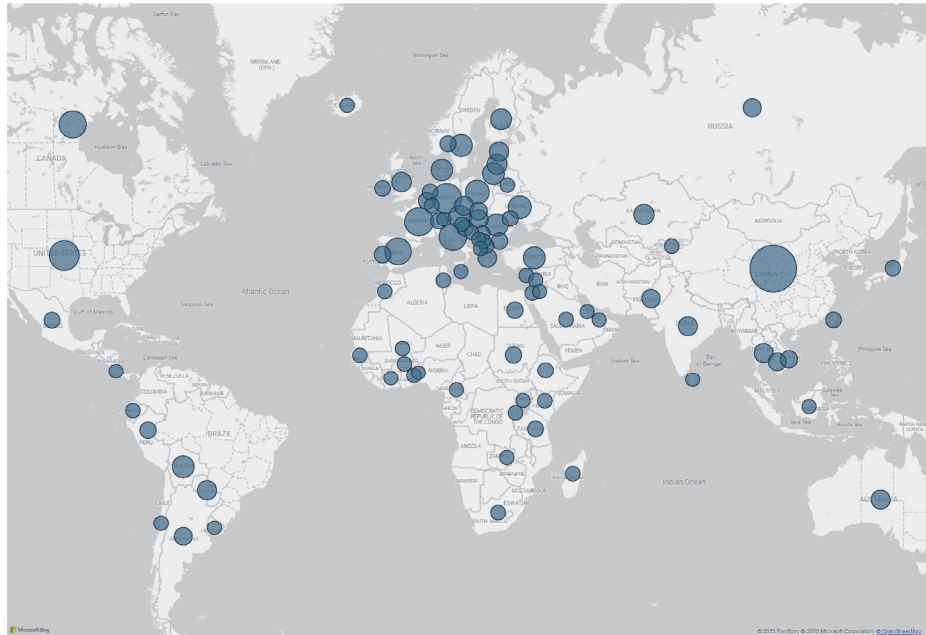
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

For detailed data crop groups, please refer to the tables provided in the Annex, section 1.6.4 Crops, page 291.

› Cereals

In 2023, more than 5.7 million hectares or 0.8 percent of the global cereal area was under organic management.

Cereals: Organic area by country



Cereals: Distribution of the global organic cereal area by cereal type

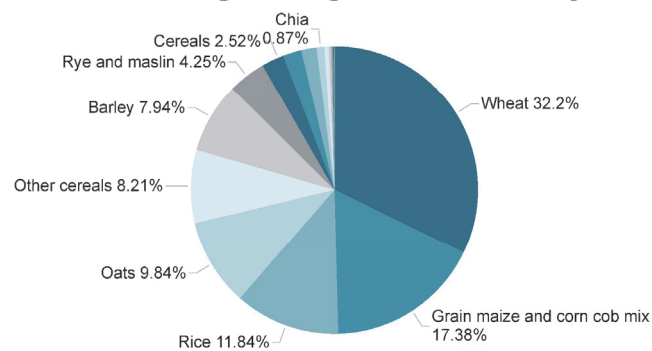
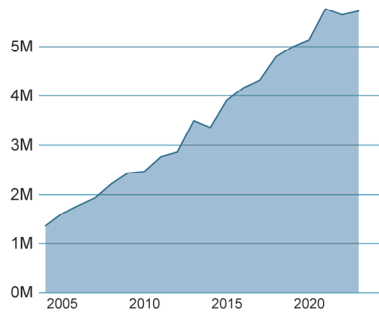


Figure 28: Cereals: Organic area 2023

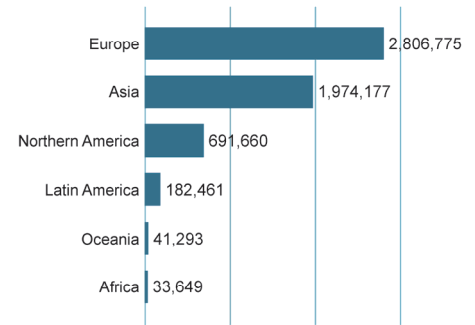
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

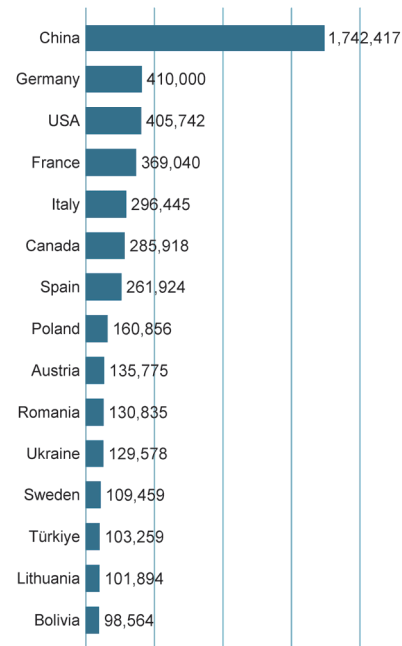
The development of the organic cereal area in million hectares



Organic cereal area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic cereal area share in %

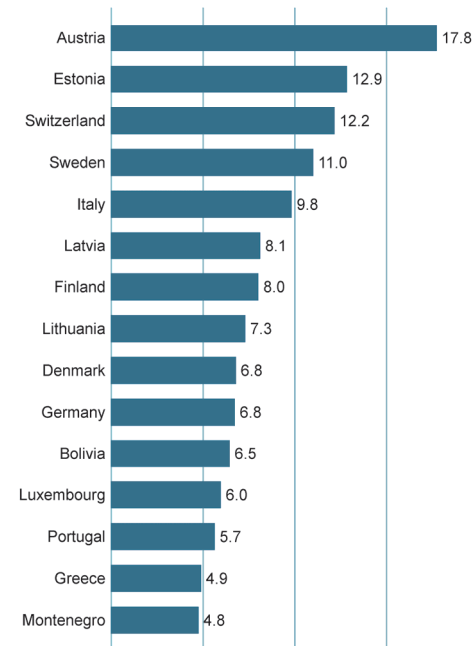


Figure 29: Cereals: Organic area 2023

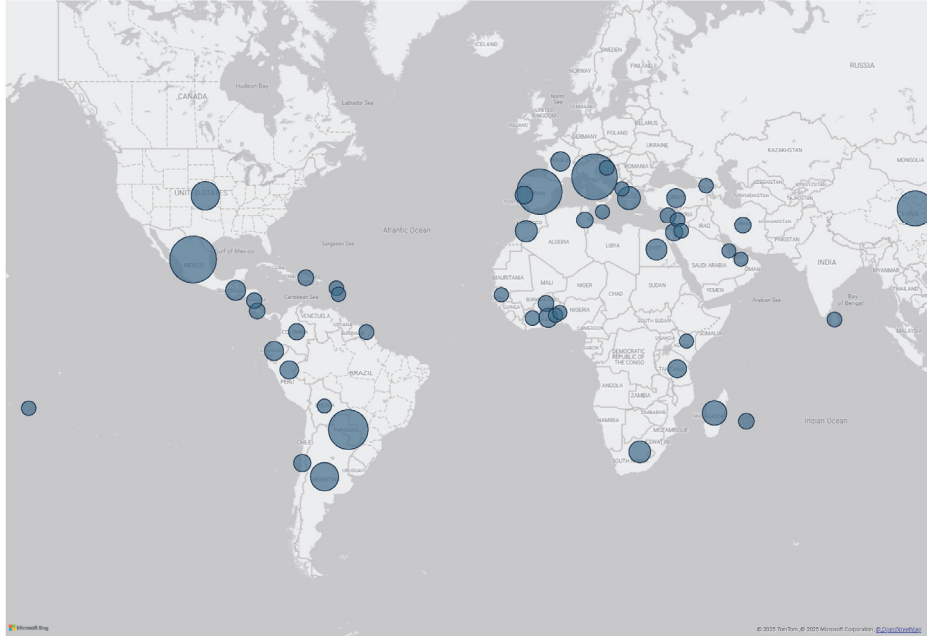
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

> Citrus fruit

In 2023, almost 139'000 hectares or 1.3 percent of the global citrus fruit area was under organic management.

Citrus Fruit: Organic area by country



Citrus fruit: Use of the organic citrus fruit area

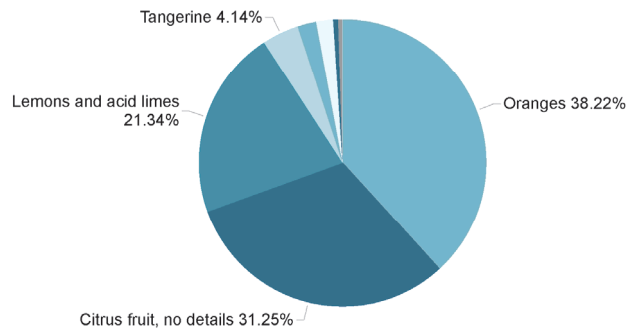
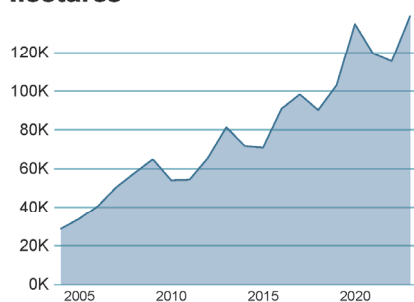


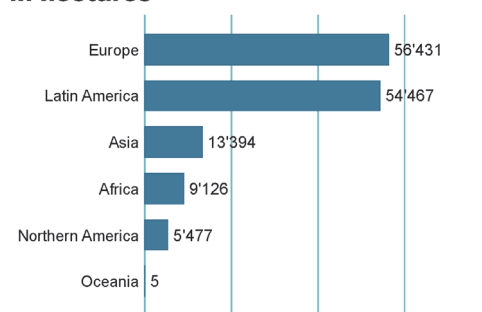
Figure 30: Citrus fruit: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Online at <https://statistics.fibl.org/visualisation.html>

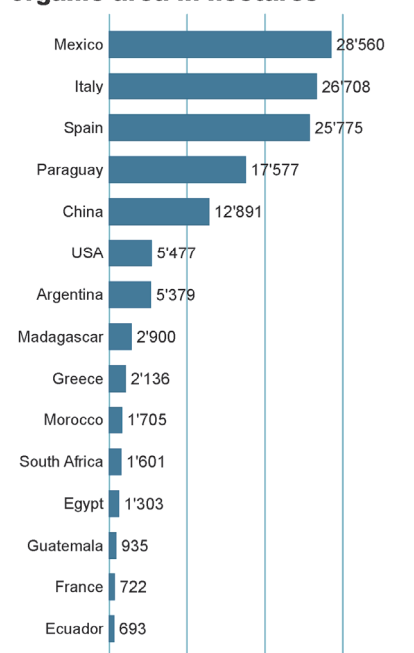
The development of the organic citrus fruit area in thousand hectares



Organic citrus fruit area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

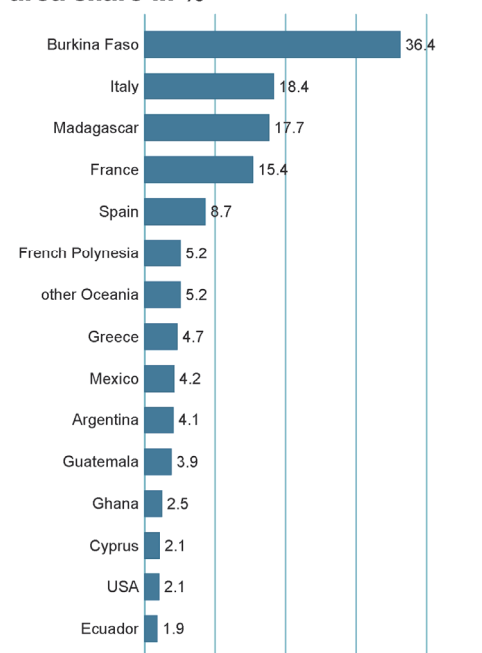


Figure 31: Citrus fruit: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

› Cocoa beans

In 2023, around 509'000 hectares or 4.3 percent of the global cocoa area was under organic management.

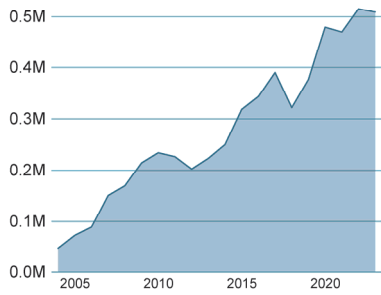
Cocoa: Organic area by country

Figure 32: Cocoa: Organic area 2023

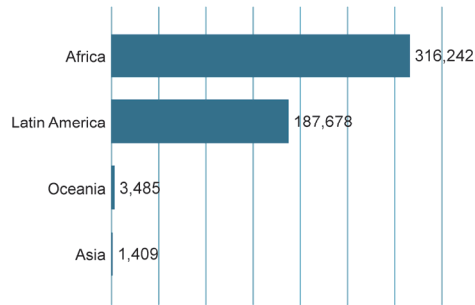
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

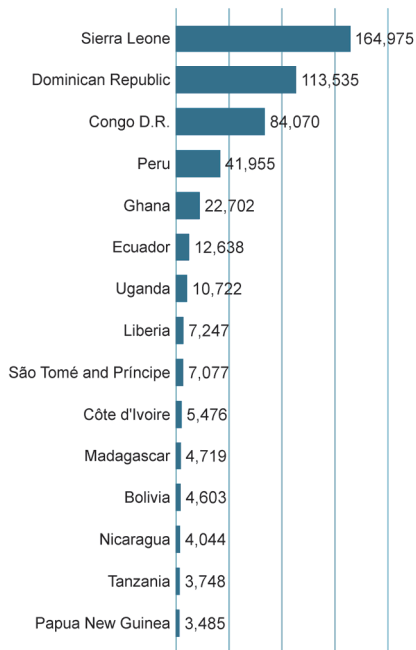
The development of the organic cocoa area in thousand hectares



Organic cocoa area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic cocoa area share in %

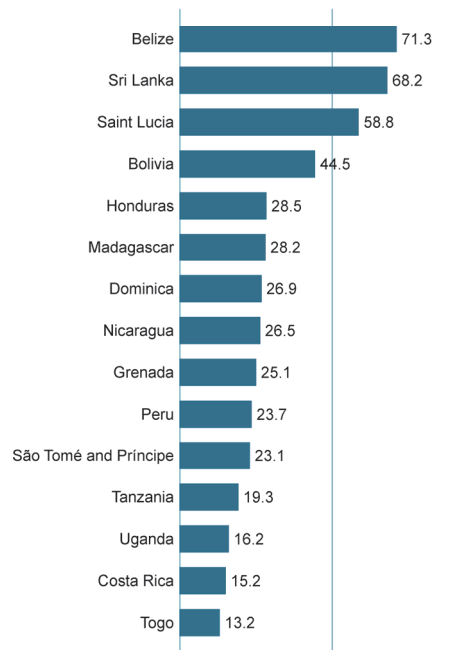


Figure 33: Cocoa: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

› Coffee

In 2023, over 899'000 hectares or 7.4 percent of the global coffee area was under organic management.

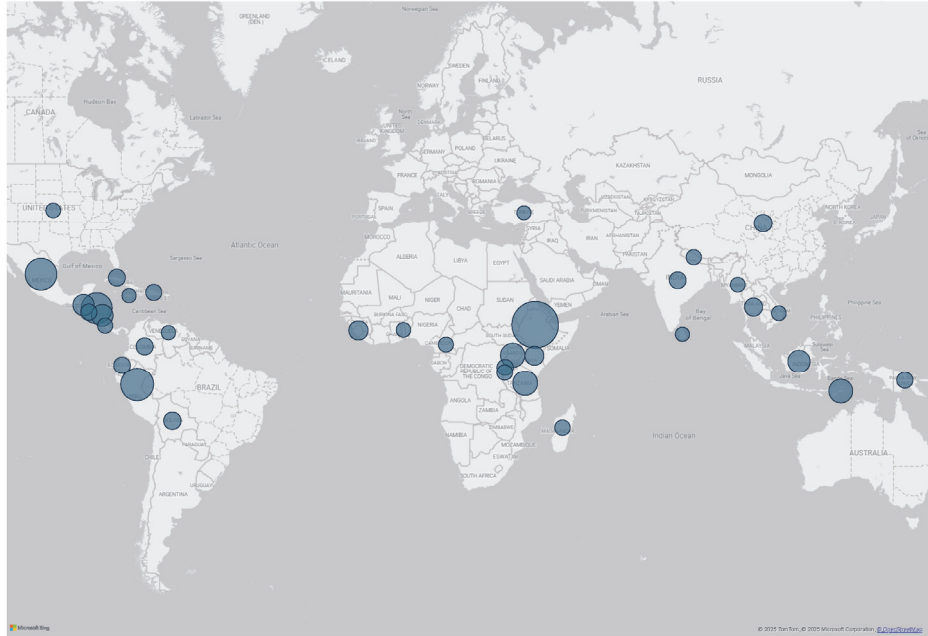
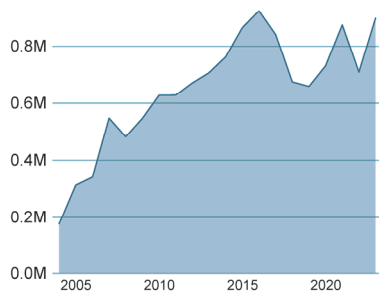
Coffee: Organic area by country

Figure 34: Coffee: Organic area 2023

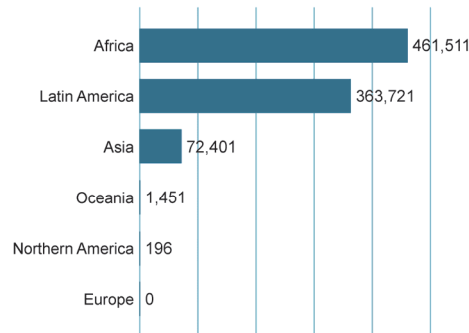
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

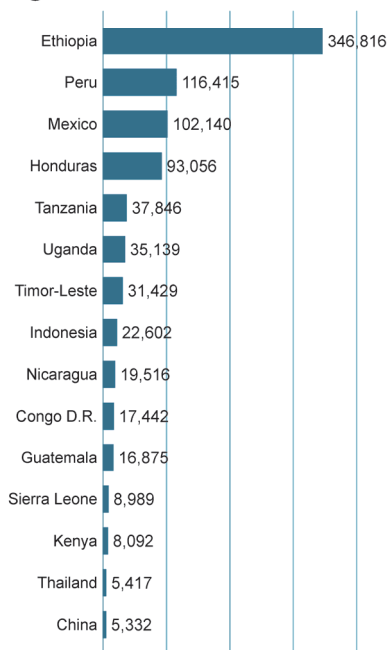
The development of the organic coffee area in million hectares



Organic area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic coffee area share in %

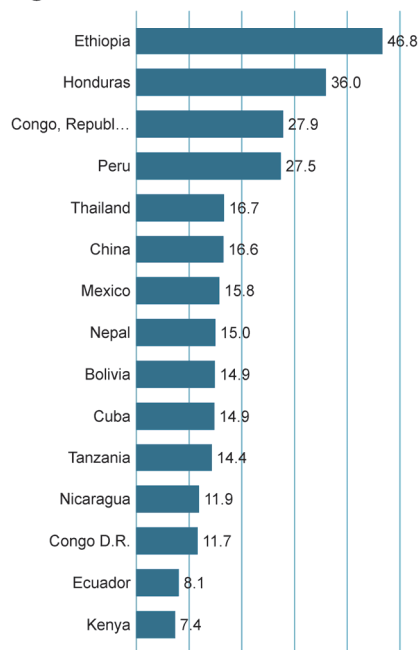


Figure 35: Coffee: Organic area 2023

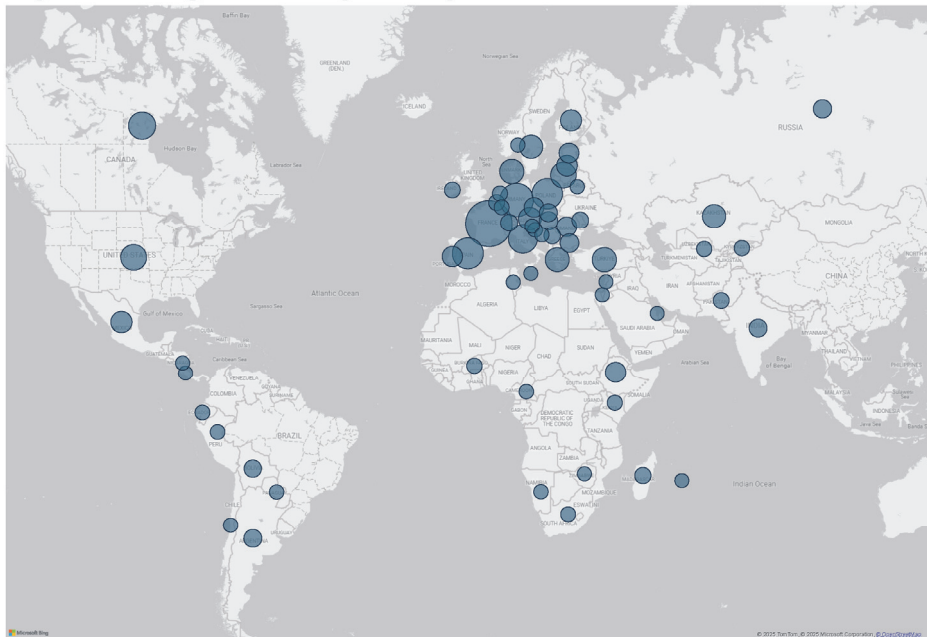
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

> Dry pulses

In 2023, around 645'000 hectares or 0.7 percent of the global dry pulses area was under organic management.

Dry Pulses: Organic area by country



Dry Pulses: Use of the organic dry pulses area

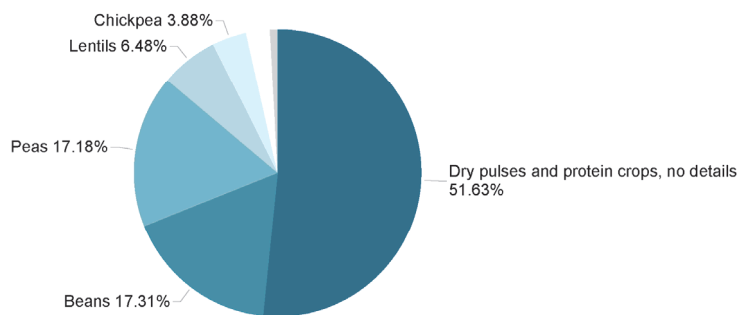
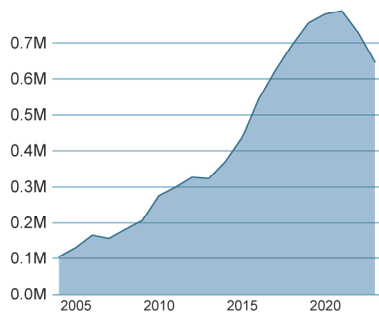


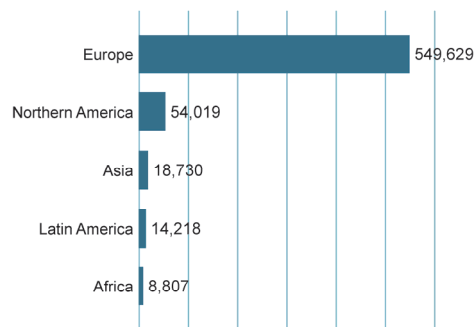
Figure 36: Dry Pulses: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Online at <https://statistics.fibl.org/visualisation.html>

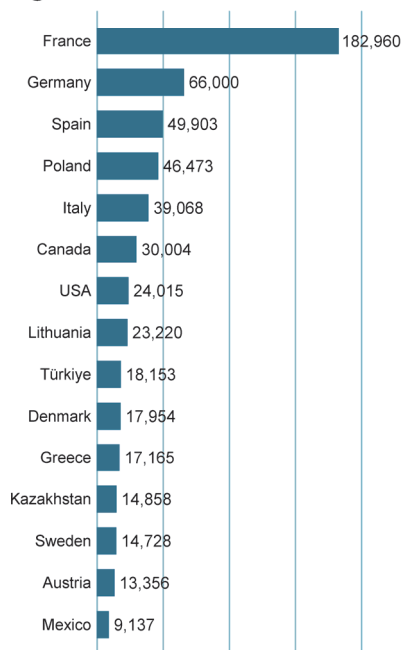
The development of the dry pulses area in million hectares



Organic dry pulses area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

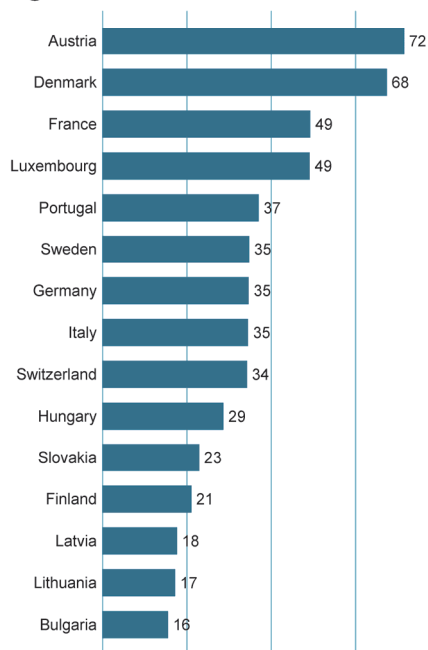


Figure 37: Dry Pulses: Organic area 2023

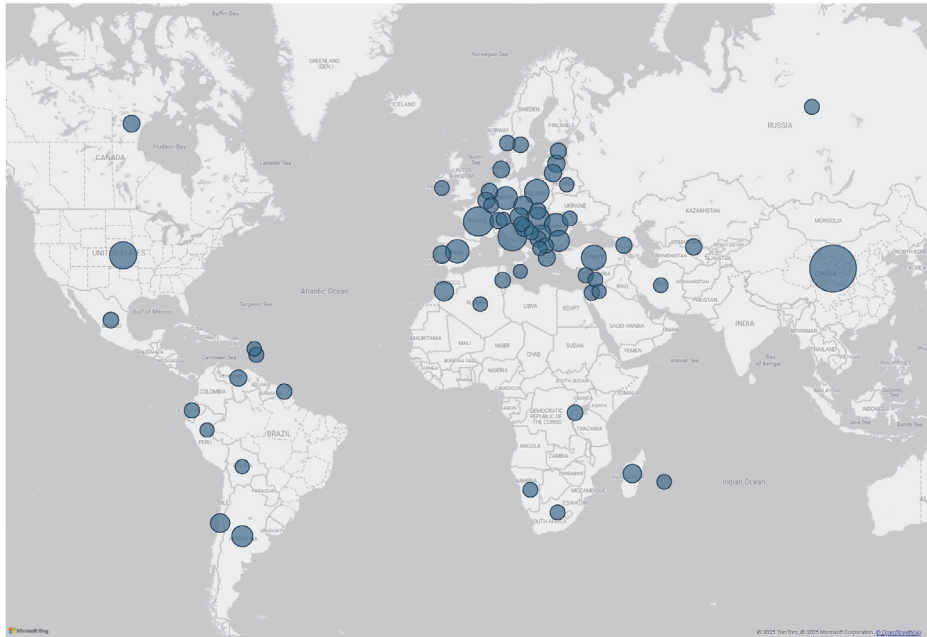
Source: FiBL survey 2025 based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

Temperate Fruit

In 2023, almost 283'000 hectares or 2.4 percent of the global temperate fruit area was under organic management.

Temperate Fruit: Organic area by country



Temperate fruit: use of the organic temperate fruit area

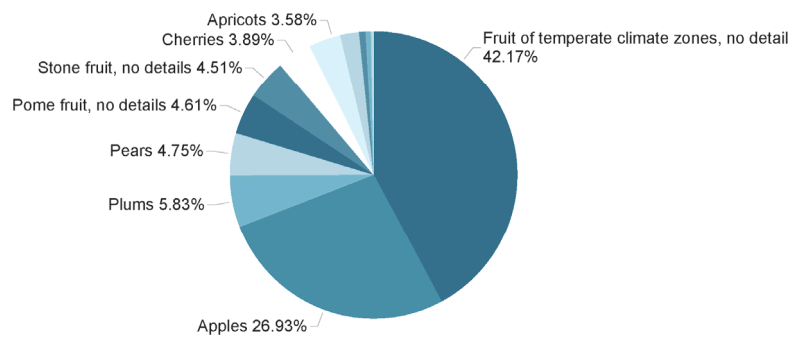
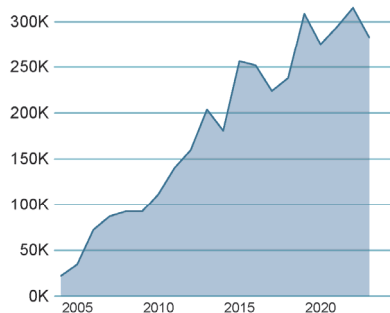


Figure 38: Temperate fruit: Organic area 2023

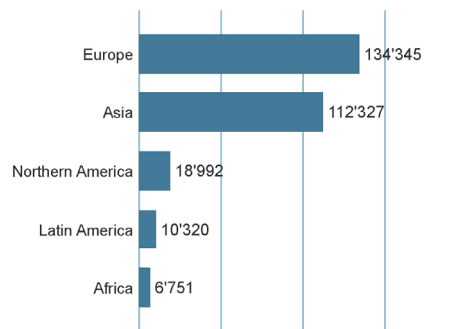
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

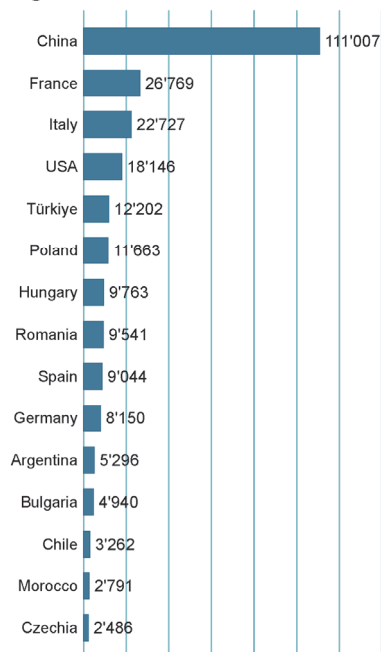
The development of the temperate fruit area in thousand hectares



Organic temperate fruit area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

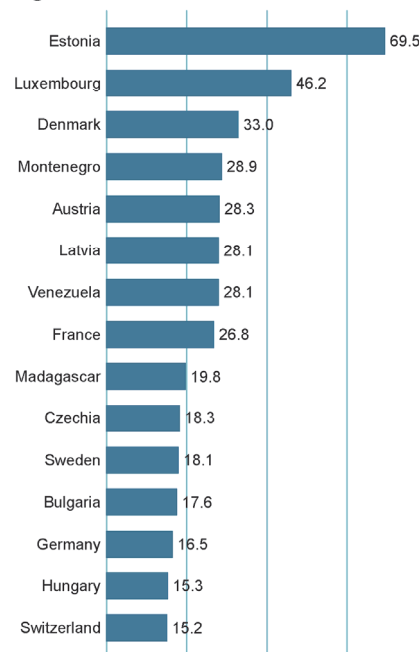


Figure 39: Temperate Fruit: Organic area 2023

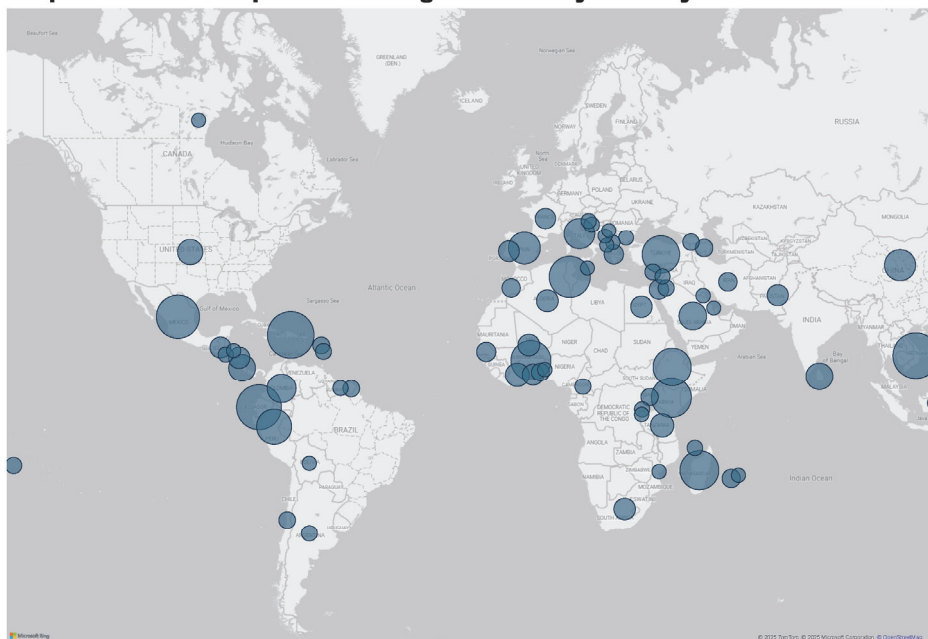
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

> Fruit: Tropical and subtropical fruit

In 2023, around 356'000 hectares or 1.3 percent of the global tropical and subtropical fruit area was under organic management.

Tropical and subtropical fruit: Organic area by country



Tropical and subtropical fruit: Distribution of global organic area by crop

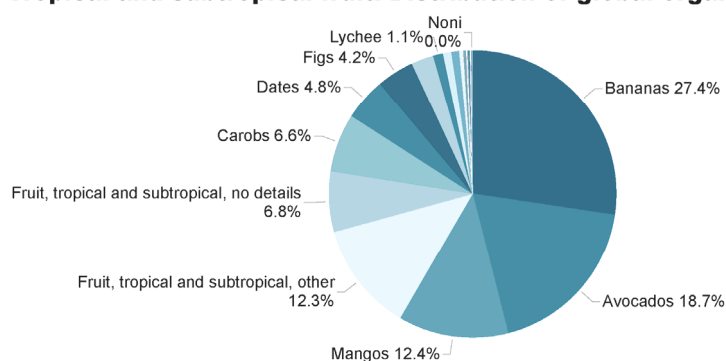
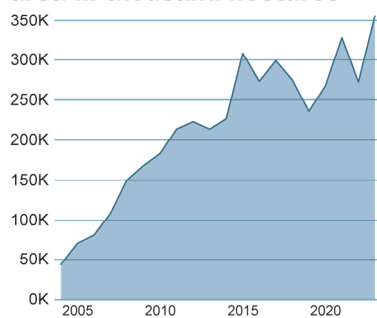


Figure 40: Tropical and subtropical fruit: Organic area 2023

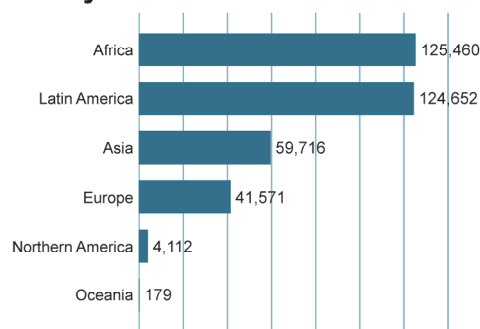
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

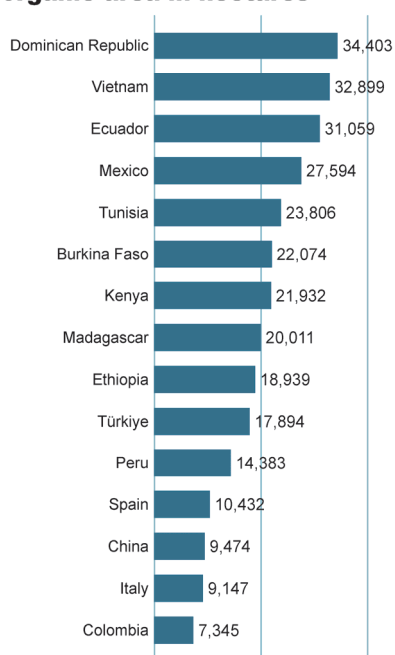
The development of the tropical and subtropical fruit area in thousand hectares



Organic tropical and subtropical fruit area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

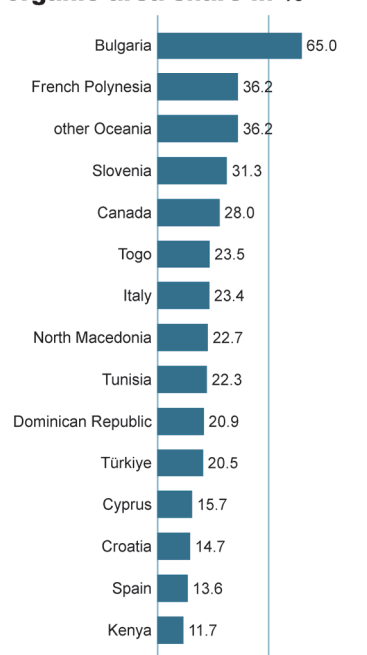


Figure 41: Tropical and subtropical fruit: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

> Grapes

In 2023, almost 528'000 hectares or 7.8% of the global grape area was under organic management.

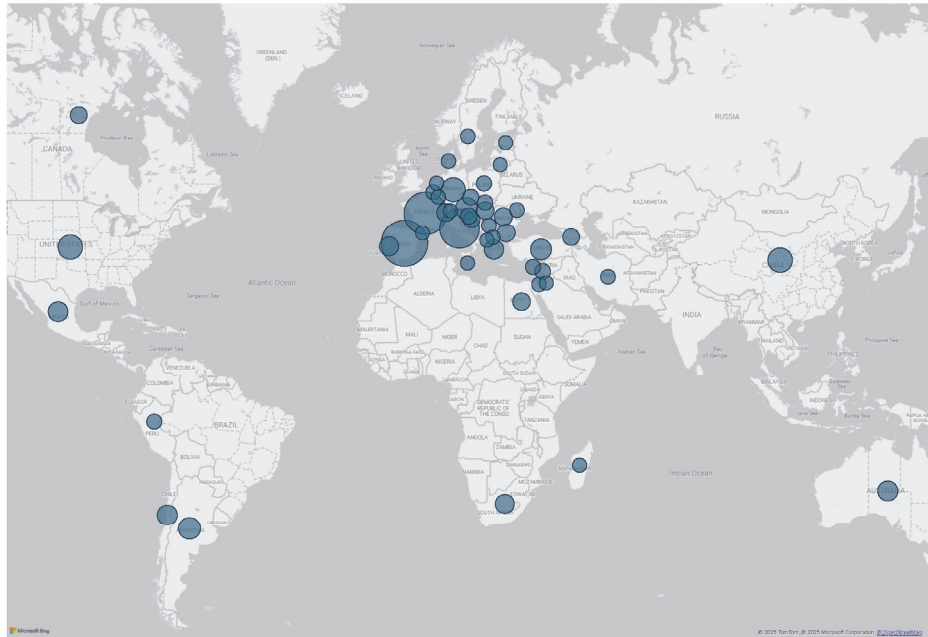
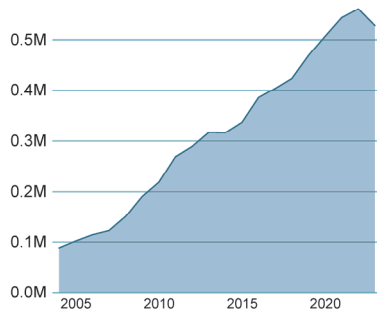
Grapes: Organic area by country

Figure 42: Grapes: Organic area 2023

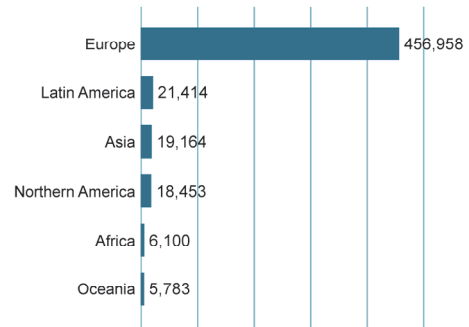
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

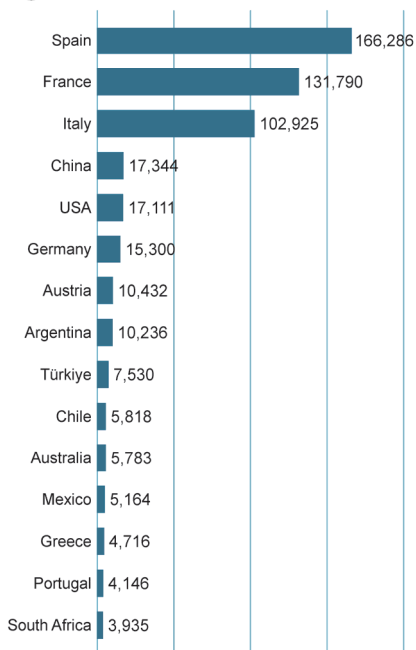
The development of the organic grape area in thousand hectares



Organic grapes area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

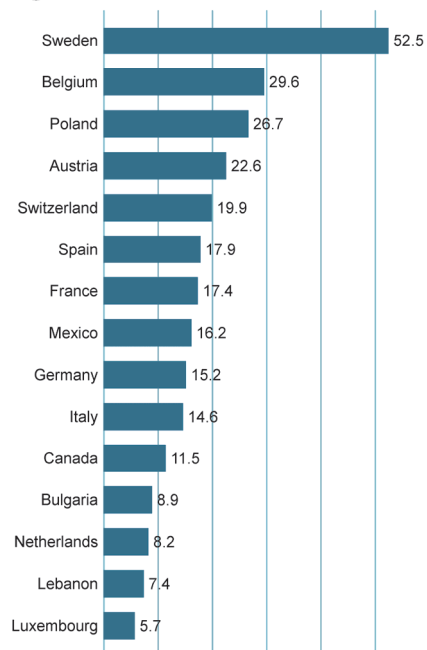


Figure 43: Grapes: Organic area 2023

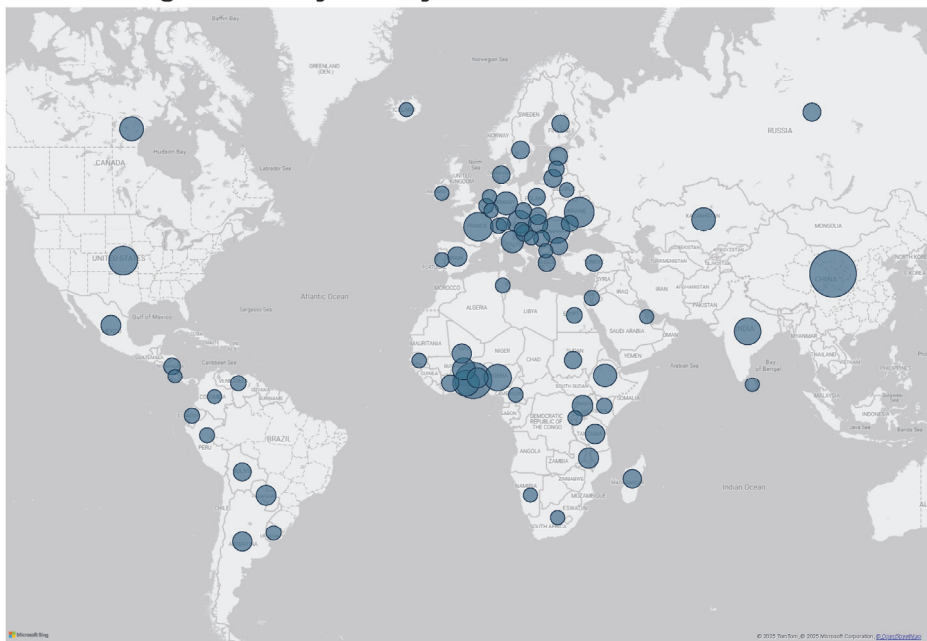
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

> Oilseeds

In 2023, around 2'274'000 hectares or 0.9 percent of the global oilseeds area was under organic management.

Oilseeds: Organic area by country



Oilseeds: Distribution of global organic oilseeds area by crop

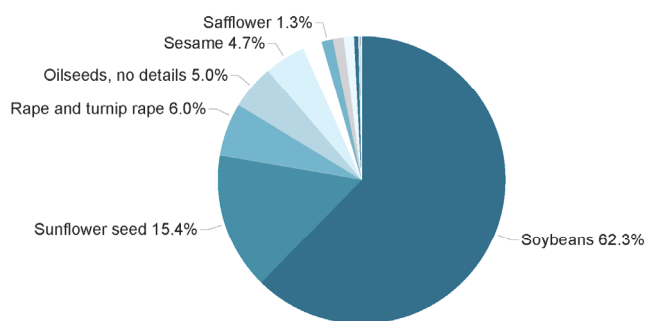
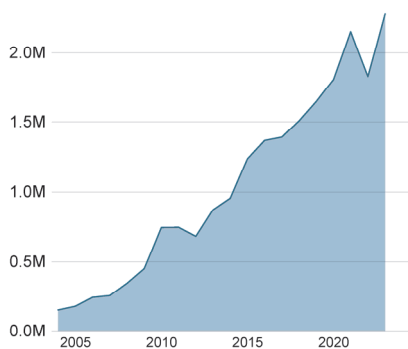


Figure 44: Oilseeds: Organic area 2023

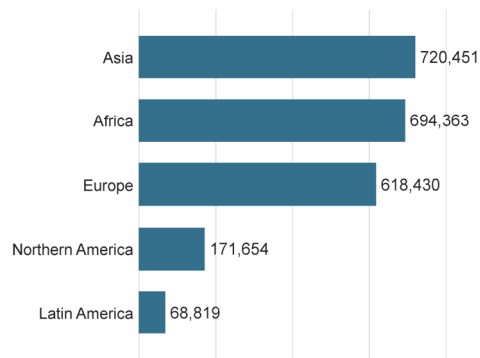
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

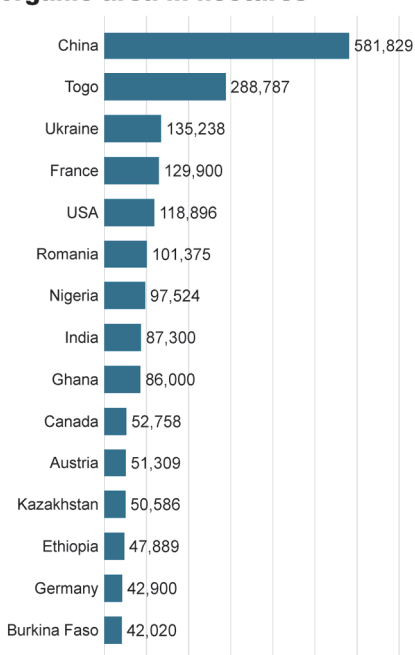
The development of the oilseed area in thousand hectares



Oilseeds area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

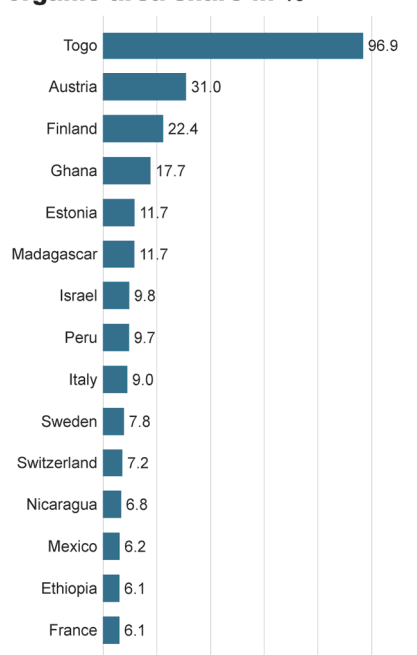


Figure 45: Oilseeds: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Online at <https://statistics.fibl.org/visualisation.html>

› Olives

In 2023, almost 826'000 hectares or 7.5 percent of the global olive area was under organic management.

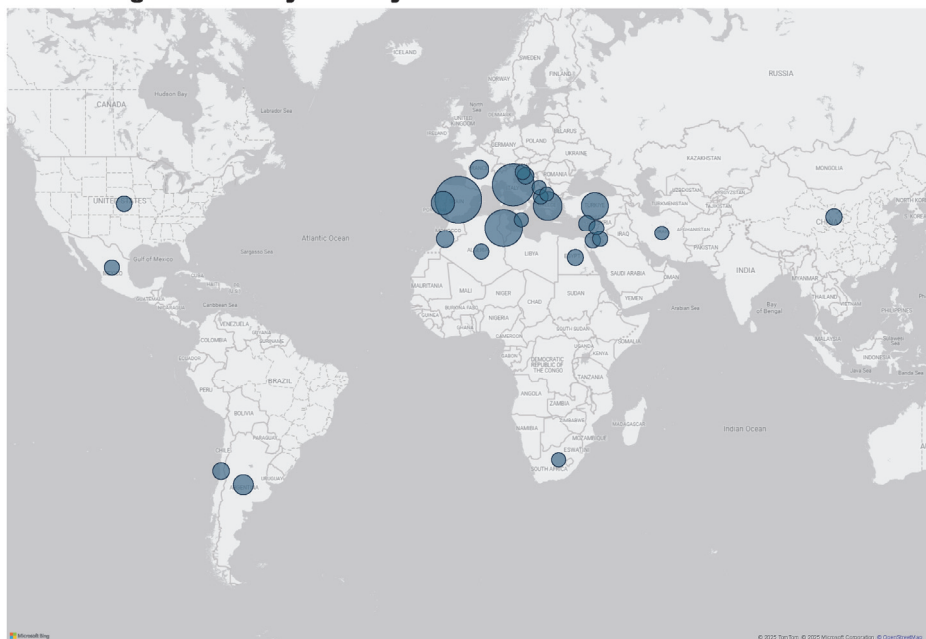
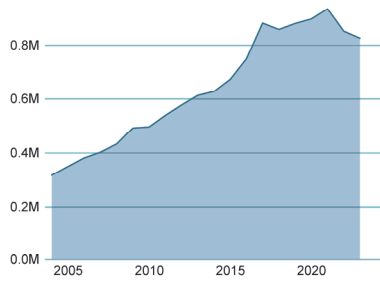
Olives: Organic area by country

Figure 46: Olives: Organic area 2023

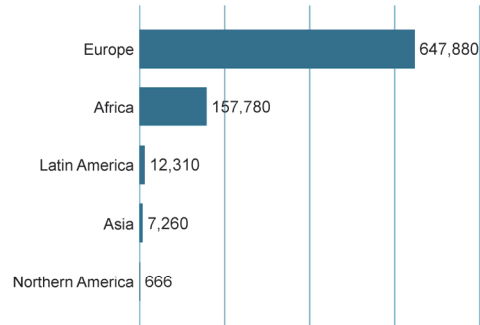
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

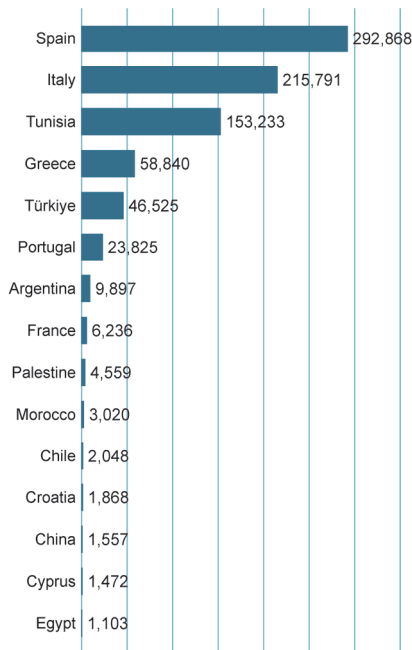
The development of the organic olive area in million hectares



Organic area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

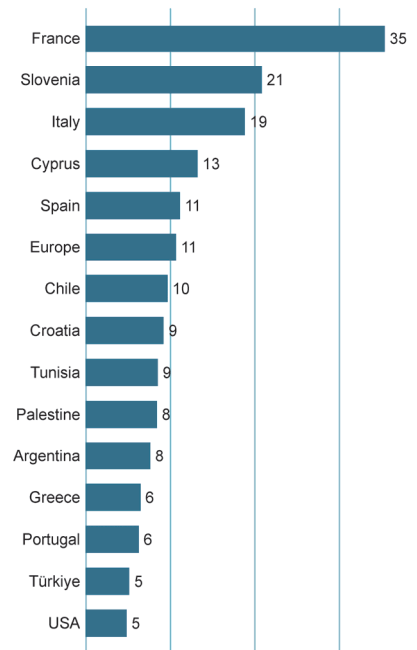


Figure 47: Olives: Organic area 2023

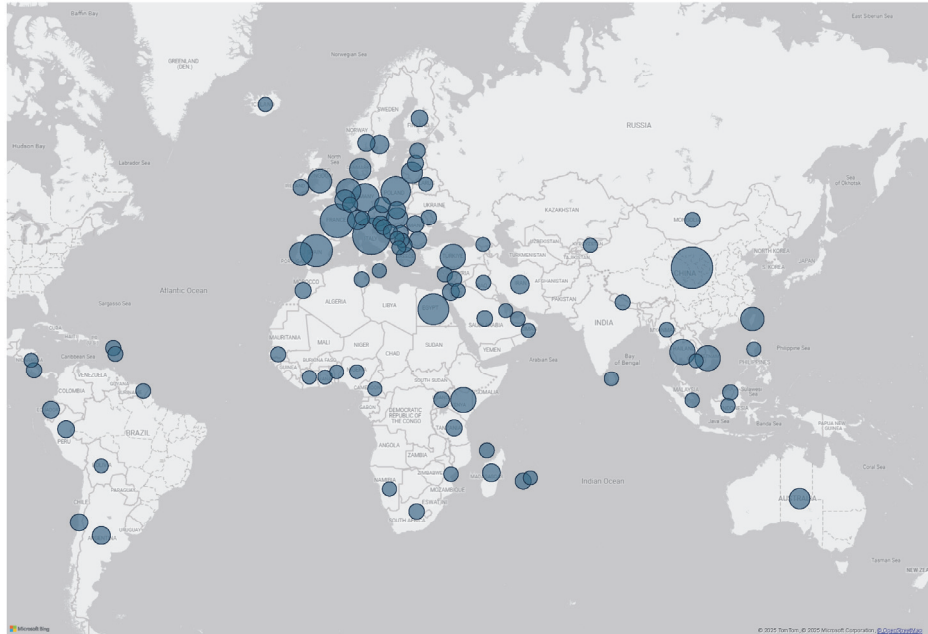
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

› Vegetables

In 2023, around 553'000 hectares or 1.0 percent of the global vegetable area was under organic management.

Vegetables: Organic area by country



Vegetables: Distribution of the global organic vegetable area by crop group

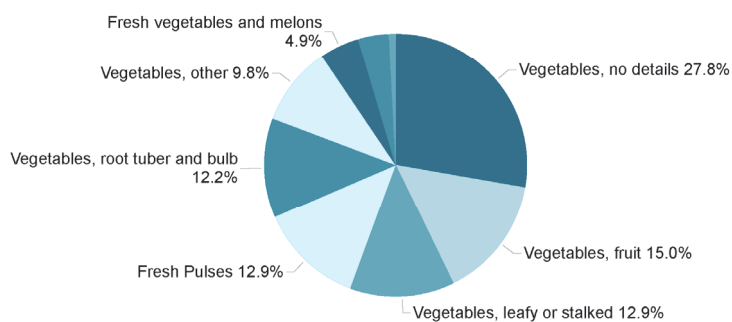
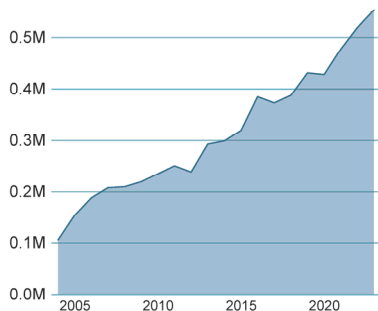


Figure 48: Vegetables: Distribution of organic area by crop group 2023

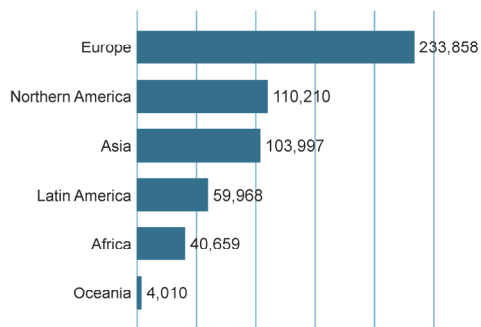
Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

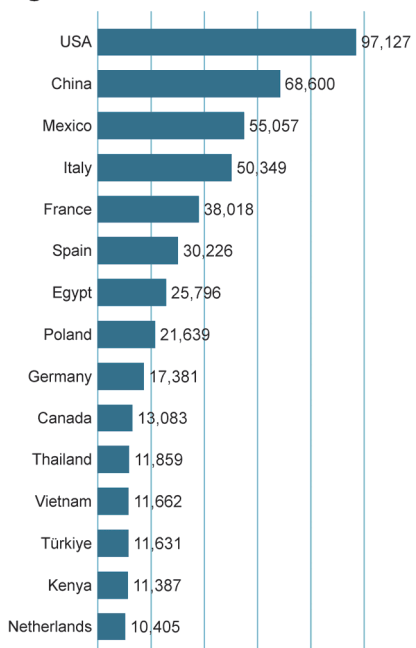
Development of the organic vegetable area in thousand hectares



Vegetable area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

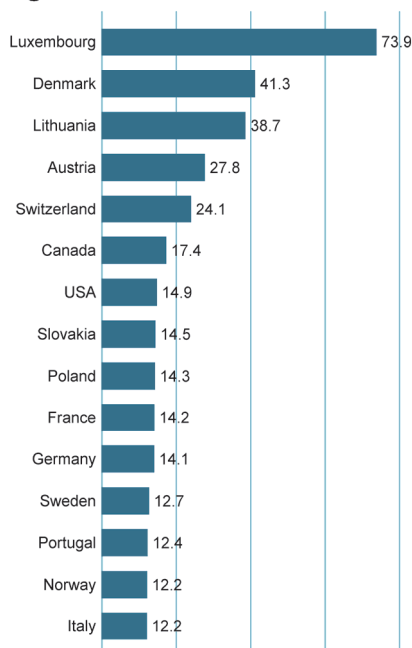


Figure 49: Vegetables: Organic area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Online at <https://statistics.fibl.org/visualisation.html>

Organic Bananas: Challenges and Global Market Trends

PAUL VAN DEN BERGE¹, SALVADOR GARIBAY² AND THOMAS BERNET³

Introduction

For decades, bananas have been among the most appreciated and consumed fruits worldwide. Beyond their positive effects on human health—such as high potassium content supporting heart function and blood pressure and essential vitamins like vitamin B6 boosting the immune system—bananas offer other important advantages. Even when produced with organic certification, they are relatively inexpensive compared to other fruits, always available, and, being protected by their peel, easy to transport and consume. These advantages also make bananas an interesting resource for processing. Bananas are highly valued as food for children, either as purée in baby food or snack bananas widely sold in supermarket chains.

Production

Bananas are grown in all tropical regions of the world, serving as an important crop for both home consumption and export. In 2023, the organic banana area grew to more than 100'000 hectares or 2.1 percent of the total banana area (Figure 50). The leading banana-producing and exporting countries are Ecuador, the Dominican Republic, the Philippines, and Colombia (Figure 51). Organic bananas are primarily cultivated in pedo-climatic zones where the incidence of diseases, particularly black sigatoka (*Mycosphaerella fijiensis*), is low. According to the FiBL survey (see chapter on Land use and key commodities in organic agriculture, page 53) in 2023,

Ecuador and the Dominican Republic were the largest producers of organic bananas, each cultivating approximately 30,000 hectares. The Philippines cultivated 28'000 hectares, while Colombia, Peru and Mexico grew more than 4,000 hectares. Côte d'Ivoire grew 1,000 hectares of organic bananas, primarily for the French market. Please note that the area data are based in most cases on data from control bodies and may not be complete in all cases.

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³ Dr. Thomas Bernet, Research Institute of Organic Agriculture FiBL, Department of International Cooperation, Frick, Switzerland, www.fibl.org

Organic bananas: Development of area

Source: FiBL survey based on national data sources

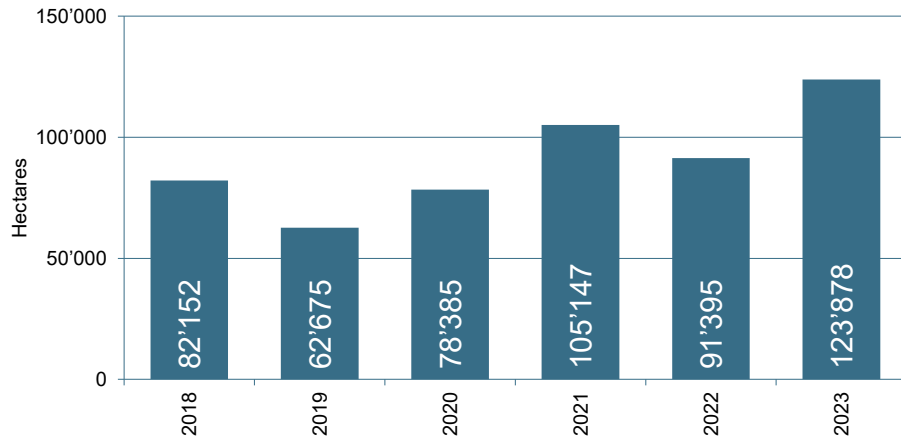


Figure 50: Organic banana area: Development 2018-2023

Source: FiBL survey based on national data sources and data from control bodies

Organic bananas: Area by country 2023

Source: Traces/ European Commission 2024

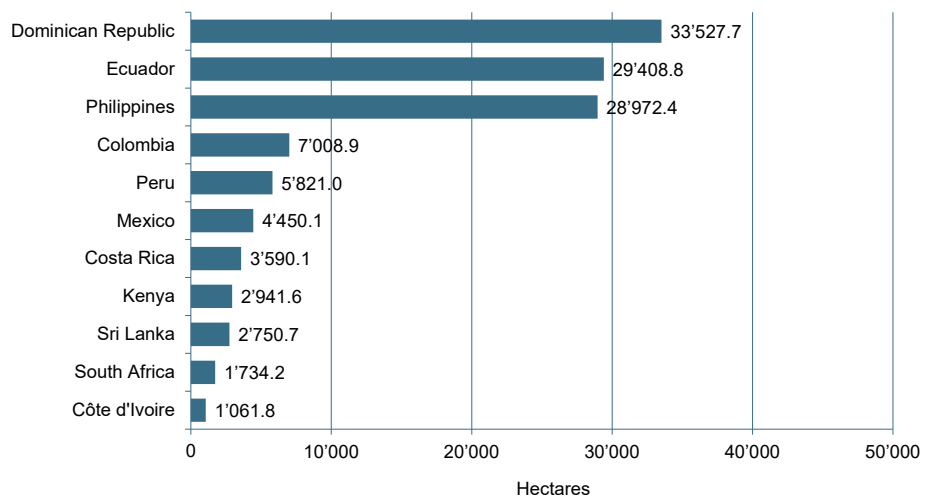


Figure 51: Organic banana area: Top 10 countries

Source: FiBL survey based on national data sources and data from control bodies

Production challenges

However, due to extreme temperatures and increasingly frequent hurricanes, banana exports from the Dominican Republic to the European Union and the United States have dropped dramatically since 2021; however, an overall increase of 18 percent was noted from 2018 to 2023 according to data from USDA/GATS and the European Commission/TRACES. Growers there now focus on the domestic market and the production of plantains, both for the processing industry and for fresh export.

Although more than 1,000 different banana varieties are cultivated, nearly all bananas exported to international markets are of the Cavendish variety, including those produced organically. The Cavendish is sterile and can only be propagated vegetatively, meaning all Cavendish bananas worldwide share an identical genetic code. If resistance to pests or diseases is compromised, all Cavendish plantations could be affected. However, organically managed Cavendish plantations appear to be more tolerant to pests and diseases than conventionally managed ones, especially when organic production is not input-intensive. This increased tolerance may be due to higher functional biodiversity within organic plantations and more subdued growth of the banana plants resulting from less intensive fertilization.

Bananas are susceptible to a wide range of pests and diseases. In conventional production, pesticide use is high. In organic production, preventive measures and good crop management are key to successfully regulating pest and disease populations. Organic bananas are primarily sourced from pedo-climatic zones where the incidence of diseases, particularly black Sigatoka (*Mycosphaerella fijiensis*), is generally lower.

One of the most significant soil-borne diseases affecting both conventional and organic banana production is Fusarium (*Fusarium oxysporum f. sp. cubense*), which causes wilting and death in banana plants. Resting spores allow the disease to persist in the soil for over 30 years, making management extremely challenging. The tropical race 4 (TR4) strain is particularly threatening, as banana and plantain plants are easily infected through irrigation water, and the fungus steadily progresses within the plant, ultimately causing its death. To date, there are no chemical, biological, or breeding techniques available to counteract its pathogenic effects.

While many Latin American countries are already severely affected, TR4 continues to spread globally. Infections have been reported in Southeast Asia, the Middle East, the Indian subcontinent, Africa, and even Europe.

Fusarium TR4 is undoubtedly one of the most pressing challenges in banana production today, significantly impacting the supply of organic bananas. In the short term, a decline in organic banana supply is expected as the disease spreads rapidly, particularly in regions where quarantine measures are not effectively implemented. Furthermore, the continued spread of TR4 increases the likelihood that importing countries may begin to require laboratory testing to protect their own crops. For example, Europe already employs such measures to protect solanaceous crops like potatoes, tomatoes, and peppers.

To address this crisis, FiBL, in collaboration with partners in Peru—the Swiss development organization Helvetas, the Centro Ecuémico de Promoción y Acción

Organic Bananas

Social (Cedepas), a Peruvian non-governmental organization dedicated to promoting sustainable development, and the Instituto Nacional de Innovación Agraria (INIA), Peru's National Institute of Agrarian Innovation—has initiated field trials funded by the Swiss State Secretariat for Economic Affairs (SECO). These trials aim to develop strategies for disease containment, protection, and prevention under organic conditions tailored to the needs of small-scale growers.

Markets

Global banana production in 2023 amounted to 139 million metric tons, cultivated on approximately 6 million hectares according to the Food and Agriculture Organisation of the United Nations FAO.¹ Around 80 percent of the total production is consumed domestically in the producing countries, while 20 percent is exported to international markets.

The growth trend for organic bananas also evident in recent years: the organic export volume for bananas to the EU and United States increased from 1.1 million tons in 2018 to 1.3 million metric tons in 2023 (Figure 52).

Organic bananas: Development of exports to the EU and US

Source: Traces/European Commission and GATS/USDA 2025

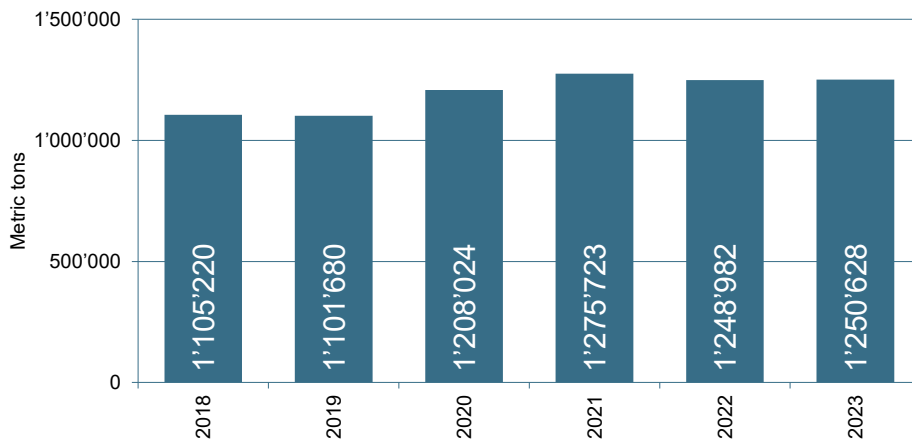


Figure 52: Organic banana exports to the European Union and United States combines: Development 2018-2023

Source: Traces/European Commission and GATS/USDA

¹ The data can be found in the FAO database at <https://www.fao.org/faostat/en/#data/QCL>

Organic Bananas: Development of exports to the EU and US: Top 10 countries

Source: Traces/European Commission and GATS/USDA 2024

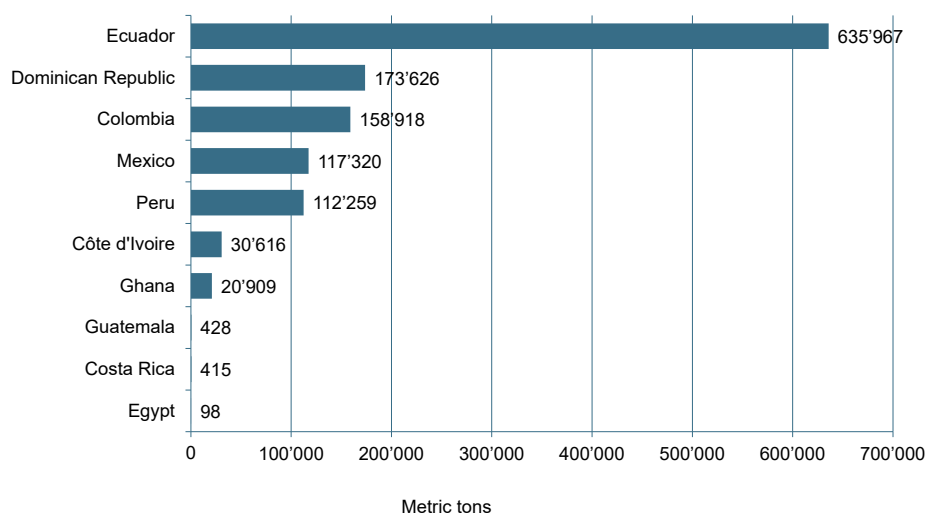


Figure 53: Organic banana exports: Top 10 countries 2023

Source: Traces/European Commission and GATS/USDA

Banana production under further standards

On international markets, particularly in the USA and Europe, not only is organic certification important, but interest in bananas certified under additional sustainability standards is also steadily growing. In 2022, at least 370,000 hectares (approximately 7 percent of the total banana area) were certified under Voluntary Sustainability Standards (VSS) such as GLOBALG.A.P., Rainforest Alliance, Organic, and Fairtrade International (Kemper et al. 2024). Organic bananas often hold additional certifications, with double certification under organic and Fairtrade International Standards being especially common (Figure 54).

Unlike organic regulations, which codify strict environmental standards and prohibit the use of synthetic pesticides and soluble nitrogen and phosphorus fertilizers, Fairtrade establishes minimum prices that cover production costs and ensure a living wage while also granting a premium to producers. For high-end markets in the USA and Europe, double certification is essential. Approximately 60 percent of all Fairtrade International certified bananas are also certified organic.

Bananas: Area development by VSS

Source: FiBL VSS survey 2024

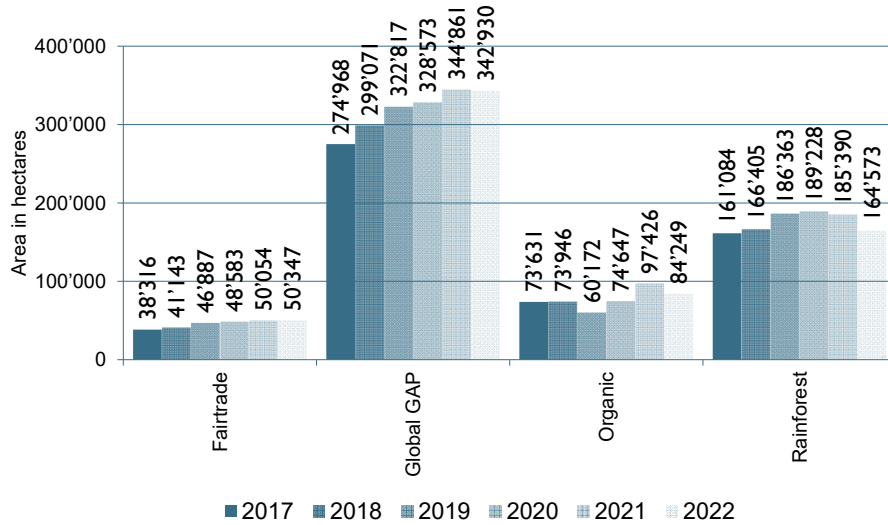


Figure 54: Bananas: Development of the area harvested by different Voluntary Sustainability Standards (VSS)

Source: FiBL VSS survey 2024 (Kemper et al. 2024; see also <https://digital.intracen.org/ssm/state-sustainable-markets-2023/bananas>; updated data to be published in early 2025)

Note. Please note that this graph shows the estimated area harvested, and the numbers therefore differ from the numbers shown in Figure 50, which show the area that is certified.

Prices

As mentioned, bananas are among the cheapest fruits available. For example, domestically grown apples are sold in Swiss retail chains at approximately 5 Swiss Francs per kilogram, nearly twice the price of double-certified organic and Fairtrade bananas, which cost little more than half that amount.

The competition between retail chains is fierce, and low-priced bananas are often used as a strategy to attract customers, sometimes even sold at a loss. Retailers wield significant and increasing bargaining power, putting continuous pressure on farm gate prices, particularly for smallholders, as trading and retail companies dictate both supply volumes and prices.

At the same time, retail chain margins average around 40 percent of the retail price, while producers receive approximately 15 percent of the final retail price. For suppliers certified as organic and Fairtrade International, the situation is somewhat better. Fairtrade International sets minimum prices that cover production costs and ensure a living income. In 2022, depending on the country of origin, Fairtrade International-certified conventional producers received between 10.35 and 12.55 US dollars per 18.4

kilogram box (FOB¹), while double-certified organic and Fairtrade producers received between 11.50 and 14.90 US dollars per box (FOB).

Organic producers who are not Fairtrade International certified do not benefit from minimum price guarantees but still receive, on average, 60 percent higher prices than their conventional counterparts.

Outlook

While *Fusarium TR4* poses a significant threat to many exporting countries, those without the disease or those managing it effectively through robust biosecurity measures are poised to benefit significantly in the coming years—at least until less susceptible strains are introduced and adopted more widely. Banana prices are likely to rise until this global disease is eradicated.

Nevertheless, as demand remains strong, business experts estimate the organic banana market to reach 1.61 billion US dollars in 2024 and project it to grow to 2.71 billion US dollars by 2029, reflecting an average annual growth rate of 11 percent during the forecast period (2024–2029; Mordor 2024). This robust growth is primarily driven by increasing consumer and retail demand. While growers and retailers interviewed for this article hold a slightly less optimistic outlook, they still anticipate significant growth in the organic banana market.

In any case, organic bananas will remain a substantial business, with the fresh market continuing to lead, complemented by growing opportunities in the convenience food sector, as bananas are an excellent ingredient for the processing industry. Beyond Cavendish, new banana varieties are expected to gain traction in trade, with organic certification driven by consumer and retail preferences.

Recently, the Swiss retail chain Coop, in collaboration with the Research Institute of Organic Agriculture (FiBL), launched a project aimed at developing organic supply chains for baby bananas and other organic varieties, reflecting the evolving market landscape.

Acknowledgement

This article has been produced with the support of Coop Sustainability Fund in the framework of the project “Organic and Fairtrade certification of baby and cooking bananas”. More information can be found here:

<https://www.fibl.org/en/themes/projectdatabase/projectitem/project/2599>

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¹ FOB stands for Free on Board, a term used in international trade. It indicates that the seller delivers the goods on board a vessel designated by the buyer at a specified port, and the cost of transporting the goods up to that point is borne by the seller.

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Statistics of the Biodynamic Federation Demeter International

CLARA BEHR¹

The Biodynamic Federation Demeter International is an umbrella organisation comprising 53 member organisations dedicated to biodynamic agriculture. Present in 40 countries worldwide, it was established four years ago with the primary goals of uniting, promoting, and strengthening the global biodynamic movement, which celebrated its centenary in 2024. The Biodynamic Federation Demeter International is the only organic association to have successfully established a global network for the individual certification of biodynamic farming practices, all under the Demeter brand.

Among the 53 member organisations within the Federation, 19 act as certifying bodies. In other countries, certification is handled by the International Certification Office (ICO) of the Biodynamic Federation Demeter International. This network includes more than 7,000 Demeter farms, covering over 260,000 hectares across 62 countries (Figure 55, Figure 56).

The Biodynamic Federation Demeter International works in partnership with its members and functions as an international federation guided by democratic principles. Biodynamic agriculture has its roots in the methods introduced by Rudolf Steiner during his “Agriculture Course” in Koberwitz (now Poland) in 1924. Since then, these methods have evolved through practical application and research. At its core is a holistic approach based on a deep sense of care, responsibility and transparency towards humanity. It also reflects a commitment to fair and respectful engagement with one’s social environment, the well-being of communities, and the preservation of the natural world.

The Biodynamic Federation Demeter International operates across various key areas, including:

- Active participation in and support of research initiatives;
- Provision of training services for farmers, advisors, certifiers, and inspectors;
- Vigilant administration to safeguard the Demeter® trademark;
- Certification of farms, processors, and traders in accordance with the International Demeter Biodynamic Standard;
- Dissemination of information and promotion efforts to increase awareness of the Demeter trademark and the intricacies of biodynamic farming methods;
- Assistance in the marketing of Demeter-certified products sourced from biodynamic agriculture;

¹ Clara Behr, Biodynamic Federation Demeter International e.V., Brandschneise 1, 64295 Darmstadt, Germany, www.demeter.net

Demeter Statistics

- Advocacy for more sustainable farming systems that benefit farmers and our environment;
- Backing for emerging biodynamic projects and initiatives worldwide.

Demeter has experienced consistent growth in certified farms over the past few decades. Since the start of the new millennium, the global count of Demeter farms has surged by approximately 4'000, reaching over 7'000. Recent developments indicate a robust interest in Demeter certification, resulting in more than 260'000 hectares of agricultural land dedicated to biodynamic cultivation. Notably, sectors like Demeter bananas and Demeter olive oil have demonstrated significant dynamism, with substantial areas transitioning to biodynamic practices due to heightened interest and the establishment of new distribution channels.

Biodynamic viticulture is also gaining prominence, with approximately 1'400 Demeter-certified wineries worldwide, led by France with 729 wineries. Outside the EU, countries such as the USA, Chile, and Argentina have the most biodynamic wineries. Around 26'000 hectares of Demeter-certified land are dedicated to biodynamic vineyards (Table 16)

Development of the Demeter-certified farms

Source: Biodynamic Federation Demeter International 2024

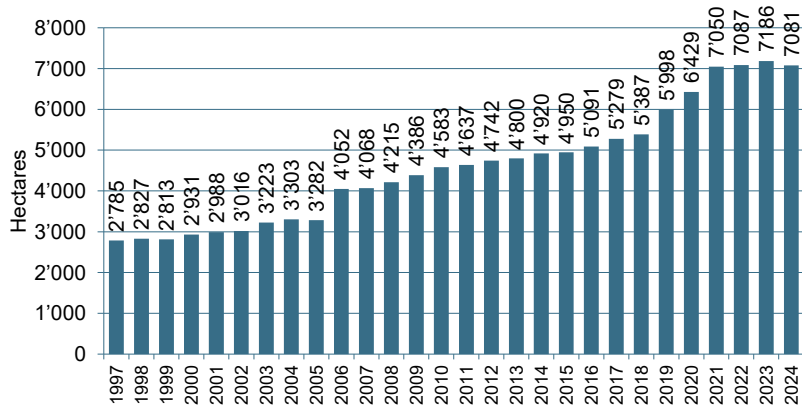
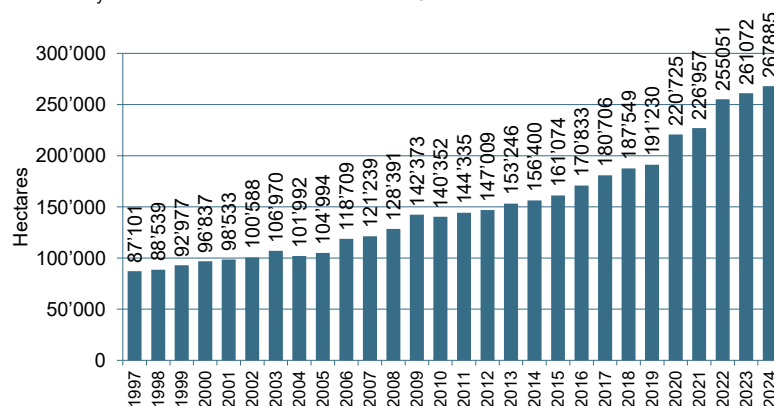


Figure 55: Development of Demeter-certified farms

Source: Biodynamic Federation Demeter International 2024

Development of the Demeter-certified area

Source: Biodynamic Federation Demeter International 2024

**Figure 56: Development of the Demeter-certified area**

Source: Biodynamic Federation Demeter International 2024

Table 14: Certified Demeter operations in member countries with certifying organisations (4/2024)

Country	Hectares	Farms	Processors	Distributors
Austria	8'559	266	49	4
Brazil	1'428	25	27	1
Denmark	4'763	48	22	25
Egypt	2'274	17	8	0
Finland	177	10	4	4
France	33'607	947	123	47
Germany	112'482	1'772	443	212
United Kingdom & Ireland	3'857	89	33	16
India	4'705	33	19	6
Italy	14'896	454	101	65
Luxembourg	513	12	2	1
The Netherlands	8.857	149	52	64
New Zealand	440	15	1	0
Norway	530	23	10	4
Slovenia	375	42	2	2
Spain	13'342	467	73	34
Sweden	930	19	11	7
Switzerland (incl. Liechtenstein)	8'50	419	106	96
USA	14'595	143	84	38
Total	234'680	4.950	1'170	626

Source: BFDI, 2024

Demeter Statistics

Table 15: Demeter operations in other countries certified by the International Certification Office (ICO) of BFDI

Counties	Hectares	Farms	Processors	Distributors
Argentina	1'897	24	2	2
Belgium ¹	309	12	7	8
Bosnia Herzegovina	74	1	0	0
Bulgaria	522	5	0	0
Chile	1'712	14	1	1
China	207	5	1	0
Colombia	487	16	1	1
Croatia	31	5	0	0
Czech Republic	4'818	8	1	0
Dominican Republic	2'309	55	1	6
Ecuador	192	2	3	1
Georgia	8	1	0	0
Greece	823	68	9	3
Honduras	97	15	0	0
Hongkong	0	0	0	1
Hungary	6'833	37	6	1
Iran	39	1	1	0
Kenya	223	218	0	0
Kuwait	0	0	1	0
Lithuania	3.141	17	0	1
Malaysia	0	0	2	0
Mexico	406	4	3	1
Morocco	18	1	0	0
Paraguay	720	3	1	0
Peru	283	71	2	1
Poland	2'515	17	4	1
Portugal	673	15	1	0
Romania	266	4	1	0
Serbia	12	1	1	0
Slovakia	151	1	0	0
South Africa	249	31	0	0
Sri Lanka	1'623	1.055	3	0
Suriname	35	1	0	0
Thailand	326	17	1	1
Tunisia	731	180	3	0
Turkey	1'124	225	4	1
Ukraine	351	1	0	0
United Arab Emirates	0	0	1	0
Uruguay	0	0	1	0
Total	267'885	7'081	1'232	656

Source: Biodynamic Federation Demeter International 2024

¹ Certified by France and Netherlands

Table 16: Demeter wineries 2024

Country	Wineries	Hectares
Argentina	19	645
Austria	70	892
Belgium	4	13
Brazil	1	212
Bulgaria	1	8
Chile	11	1'302
China	1	59
Croatia	3	7
Czech Republic	1	44
Denmark	3	8
France	729	14'548
Georgia	1	3
Germany	115	1'209
Greece	18	47
Hungary	9	102
Italy	197	2'583
Netherlands	2	7
New Zealand	8	210
Poland	1	7
Portugal	3	25
Romania	3	154
Serbia	1	11
Slovenia	10	93
South Arica	1	43
Spain	74	2'163
Switzerland	73	509
Turkey	1	1
United Kingdom and Ireland	12	67
United States	67	1'584
Total	1'439	26'556

Source: BFDI, 2024; including wineries in conversion to Demeter

Global Market for Organic Food and Drink

The Global Market for Organic Food & Drink

AMARJIT SAHOTA¹

This chapter has been prepared by Ecovia Intelligence (formerly known as Organic Monitor) from its ongoing research on the Global Market for Organic Food & Drink. No part of this chapter may be reproduced or used in other commercial publications without written consent from Ecovia Intelligence. To request permission, write to: Ecovia Intelligence, 79 Western Road, London W5 5DT, Tel. +44 20 8567 0788, e-mail services@ecovaint.com

I. Introduction

The global market for organic food & drink was valued at 130.4 billion euros in 2023.² All geographic regions reported growth this year, although the growth rates vary. The European market showed the largest increase, partly because of some country markets recovering from negative growth in 2022. In terms of revenues, the European market showed an increase of almost 2 billion euros in 2023.

Fluctuations in exchange rates of major international currencies continue to affect revenue growth in the organic food market. If measured in euros, market growth of 1.6 percent occurred in 2023. In terms of US dollars, there is growth of 4.4 percent. This difference is because the Euro strengthened against the US dollar in 2023. This gives Europe higher market growth in terms of US dollar revenues. When measured in euros, the drop in the US dollar offsets the actual growth in the North American market. Fluctuations in exchange rates will continue to distort measurements in revenue growth.

The global market for organic products has become more susceptible to macro factors. After showing a spike in sales in 2020, market growth has been curtailed by geopolitical conflict and weak economic conditions. The effects of the war in Ukraine have created economic uncertainty in Europe, affecting consumer behaviour. Food inflation has had a major impact on consumer expenditure on food products in all regions. Its impact has been most observed in Europe and North America where consumers have become more price sensitive. Organic food sales are increasing in some countries more because of rising prices than higher volume sales.

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Amarjit Sahota is the Founder of Ecovia Intelligence (formerly Organic Monitor). Since 2001, the organisation has been tracking the global organic & related product industries. More details are on www.ecovaint.com

² Please note that due to differing data collection methods this number differs from the number provided by FiBL (see chapter on the global survey on organic agriculture in this volume).

2. North America

The North American market for organic products is the largest in the world, worth 64.5 billion euros in 2023. The majority of revenues are from the US market, which has the biggest market for organic food & drink in the world: valued at 59 billion euros.

Although North American revenues have reached a record high, market growth is lower than previous years. Consumer demand for organic products remains buoyant in the US and Canada, however inflation and economic conditions are affecting consumer expenditure. Prices of conventional foods and organic foods have increased since 2021. Much of the growth in 2023 has been because of rising prices of organic foods, although volume sales have also increased.

Organic food & drink sales increased by 3.0 percent in 2023. All this growth was from the US market. The Canadian market contracted by 1 percent that year. The Canadian organic sector has been experiencing a drop in organic farmland, operators and product sales since 2022. Weak economic conditions and inflation are believed to be responsible. The North American organic foods market is expected to continue to show healthy growth in the coming years. There are positive predictions for the US economy, and the region is relatively less affected by geopolitical conflict. There is also a strong consumer market for organic products. Various studies are showing that millennials and Gen Z consumer segments are becoming avid buyers of organic foods. As their disposable income increases, they are expected to make more purchases.

3. Europe

The European market was valued at 53.2 billion euros in 2023.¹ The largest markets are in Germany, France, Switzerland, Italy and the UK. These four country markets represent two-thirds of European revenues.

The organic food market is being affected by the weak economic climate in Europe. Some countries like France and Sweden reported almost no growth, whilst other countries reported inflationary growth. Few countries reported strong growth in 2023; the Belgian market reported the highest increase (21 percent) partly because of high demand from the Flanders region. Conversely, the Finnish market continued to decline in 2023 with a 6 percent contraction. Overall growth in the European market was 3.6 percent in 2023. Much of this is because of higher spend on organic products rather than increase in actual volumes.

Europe has been experiencing a cost of living crisis and high inflation. Both factors are having an adverse effect on organic food sales. Some specialist organic food shops closed during the harsh economic climate, whilst other retailers rationalised their product ranges. In France, about 172 organic food shops closed in 2022. In the UK, the leading organic food retail chain Planet Organic almost went bankrupt in 2023. Organic

¹ See also chapter on the European market in this volume. Again please note that due to different collection methods, numbers may vary.

food retailers have been impacted by the rise in energy costs, food prices, and labour costs.

Inflation has led to higher prices of organic and conventional foods. Revenue growth in countries like Germany and the UK has been partly because of higher prices of organic products. There is a mixed picture in terms of sales channels. Some countries like France are reporting that sales are increasing from specialist retailers, whilst sales from mainstream retailers are reporting a drop in organic food sales. Other countries like Germany are showing growth from supermarkets and discount stores.

4. Geographic regions

North America and Europe comprise most global organic food sales, with combined share of 90 percent as shown in Figure 57. Although organic foods are now produced in all major continents, demand is concentrated in these two regions.

The Asian market is the third most significant, contributing the majority share of the 12.7 billion euros in revenue. After China, the most important markets for organic foods are in Japan, South Korea, Taiwan and India. The Australasian market for organic products is also important; Australia and New Zealand have important domestic markets and also leading exporters.

Other important markets for organic products are in Brazil, Russia and South Africa. Latin America is a major producer and exporter of organic foods. Africa is also established as an important exporter of organic products, although an internal market is growing.

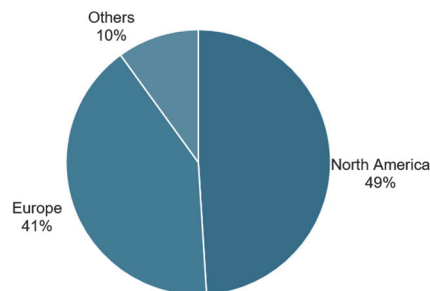


Figure 57: Breakdown of revenues by major geographic regions, 2023

Source: *Ecovia Intelligence*

5. Future of Organic Labels

There are questions about the future of organic labelling in the food industry. The USDA NOP¹ organic logo is well-established in the North American market, whilst the European Union's organic logo is omnipresent on organic foods in Europe. Both organic logos are protected by government regulations. However, a trend is that new organic labels and logos are emerging.

Important developments are in the US market; some organic producers look at the USDA NOP as a baseline standard and want to adopt higher standards. Organic pioneers are adopting the Regenerative Organic Certification (ROC) scheme. Introduced in 2020, the standard has been adopted by almost 300 farms and 61,104 smallholder farms that manage 18.4 million acres (approximately 7.4 million hectares) of land area. The standard has three pillars: soil health, animal welfare, and social fairness. Certified products carry the ROC logo, which is becoming more visible on organic products in the North American market.

The ROC standard has been adopted by 223 brands; these include leading American brands such as Nature's Path, Alter Eco, Bonterra Vineyards and Lundberg Family Farms. International operators are also adopting the ROC standard; they include Aliet Green (Indonesia), Big Tree Farms (Indonesia), Daabon (Colombia), Native (Brazil), Serendipol (Sri Lanka) and EcoFarms India. The international fashion brands H&M and Patagonia have also adopted the ROC standard for organic cotton.

Other organic farmers are turning to The Real Organic Project, a farmer-led grassroots movement that started in Vermont in 2018. The standard goes beyond the USDA NOP standard, covering organic foods that are soil grown and pasture raised. Over 1,000 organic farmers have adopted the Real Organic Project. Certified products have the Real Organic Project label.

In Europe, it is common to see organic products with more than one label. In many countries, two labels are the norm for organic products whilst some have three or more. In Germany, many organic products have the logos of Naturland, Bioland and similar organisations, as well as the EU organic logo. The Biosiegel (German label for organic products) is also widely visible. Other countries also have national labels for organic products; France has the Agriculture Biologique (AB) label, whilst Denmark has the Ø-label. In Germany, the Bavaria state launched the regional organic label: Bayerisches Bio-Siegel in 2015.

In other regions, countries also have national logos for organic products. These include Brazil, India, Japan and China. However, many countries without a strong organic sector rely on third party standards. For instance, many producers in Asia and Africa adopt European and / or American organic agricultural standards.

The growing number of organic labels in the global organic food industry raises questions about the future: will we see more proliferation in organic labels? Will there be more voluntary standards / labels or more national logos? What impact will the

¹ USDA is the United States Department of Agriculture and NOP the US National Organic Program.

growing number of organic equivalency agreements have on labels? Will consumers be able to distinguish between the increasing numbers of organic labels? How can the global organic food industry prevent fragmentation in terms of standards and labels?

6. Conclusions

Global sales of organic products continue to rise. Although consumer demand for organic food & drinks remains strong, purchases are increasingly affected by macro factors. Weak economic conditions and inflation have stifled consumer demand. Much of the growth in 2023 was because of rising product prices rather than increasing unit sales.

Looking ahead, the North American market is expected to continue to lead in the coming years. The US economy remains strong and is less affected by geopolitical conflict than that in Europe. Apart from weak economic condition, political uncertainty is another macro factor likely to affect consumer behaviour in Europe in 2025. France and Germany are experiencing political instability with elections in Germany in spring 2025. Changes in government will affect the economic situation, which will have a knock-on effect on consumer purchases.

In the near term, oversupply is a major concern. The spike in consumer demand in 2020 led to product shortages. Many producers increased production levels anticipating high demand to continue. Slow growth is leading some organic products to go into the conventional market. The organic meat and dairy sectors have been some of the most affected sectors. Organic livestock farmers have been affected by rising production costs, competing demand from plant-based foods, and now overproduction.

Policy Support and Regulations

Policies Advancing Agroecology and Organic Agriculture in 2024

SAHAR BRAHIM¹ AND GÁBOR FIGECZKY²

Introduction

Global efforts to advance agroecology and organic agriculture are gaining momentum, with governments implementing targeted policies aligned with sustainable development goals. Regional trends demonstrate innovative policy frameworks that prioritize ecological, social, and economic considerations.

This document explores pivotal policies and trends developed in 2024 that drive the transition towards agroecology and organic agriculture, highlighting their role in transforming food systems and building a more sustainable and resilient future.

Europe

EU pesticide residue and certification rules

Under the EU Green Deal and Farm to Fork Strategy, new regulations aim to enhance sustainability and food safety but could impose additional compliance costs that may offset the benefits of existing preferential trade agreements with Global South countries.

- One major regulatory update includes stricter rules on non-authorized pesticide residues in organic products, set to be finalized by 2025. Regulation (EU) 2024/989, issued on April 2, 2024, outlines a multiannual control program for 2025–2027 to enforce pesticide residue limits and assess consumer exposure to residues in food of plant and animal origin, replacing Regulation (EU) 2023/731 (European Commission, 2024, Bio Eco Actual, 2024).
- A significant overhaul in organic certification systems will occur on January 1, 2025, when the EU fully transitions to compliance under Regulation (EU) 2018/848. This change phases out the equivalence system previously used to certify organic imports from third countries, requiring all products to meet EU standards directly. During a proposed derogation period until October 15, 2025, equivalence certificates from recognized control bodies will remain valid under specific conditions. The new regulation allowed a three-year transition period, ending on December 31, 2024, for recognized control bodies to shift from equivalence to compliance. Notably, organic imports from 14 countries with national organic systems recognized through equivalence or trade agreements are subject to separate timelines. Products certified under these agreements may continue to

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enter the EU without full compliance until the equivalence system is entirely replaced by the end of 2026 (Meinshausen et al., 2024).

The European Union (EU) prioritizes sustainable and organic farming through its 2023–2027 Common Agricultural Policy (CAP) and promotion initiatives, aligning with the European Green Deal’s sustainability, competitiveness, and food security goals.

Africa

African countries are increasingly incorporating agroecology into their agricultural frameworks to transform food systems, enhance food security, reduce poverty, and meet global and regional commitments such as the UN’s Sustainable Development Goals (SDGs) and the African Union’s Agenda 2063. Agroecology, which shares many principles with organic farming, is recognized for addressing key priorities, including climate change adaptation, biodiversity conservation, food security, and gender equality.

The Comprehensive African Agricultural Development Programme (CAADP), the Malabo Declaration, and the Southern African Development Community’s (SADC) Regional Agricultural Investment Plan (RAIP) all emphasize the need to allocate 10 percent of national budgets to agriculture. Despite this, much of the agricultural support in these regions still favors conventional farming, with less than 50 percent of agricultural budgets directed toward agroecological practices in the 2023-2024 fiscal year. Support for agroecology typically focuses on promoting participation, knowledge co-creation among farmers, researchers, and policymakers, and economic diversification to reduce crop dependency and boost resilience. These principles align with organic farming’s focus on local control, community knowledge, and sustainability. However, critical areas like reducing farmers’ reliance on external inputs, promoting recycling, and improving animal health, remain underfunded (Action Aid, 2024).

In 2022, the PSA Alliance developed and piloted the Agroecology Financing Analysis Tool (AFAT) for Africa to help its members assess public financing for agriculture. The tool focuses on identifying levels of support, investment, and commitment to agroecological transitions, including climate-resilient and gender-responsive practices that benefit smallholder farmers. AFAT is guided by a global community of practice, led by Coopération Internationale pour le Développement et la Solidarité (CIDSE) and the Centre for Agroecology, Water and Resilience (CAWR), which develops indicators for agroecology using the HLPE (High-Level Panel of Experts on Food Security and Nutrition) 13 agroecology principles as its framework. The tool offers an open-ended list of indicators and examples of good practices, adaptable to local contexts. A study using AFAT revealed varying levels of support for agroecology in Malawi, Tanzania, Zambia, and Zimbabwe during the 2023-2024 fiscal year:

- **Malawi** allocated 12 percent of its budget to agriculture, with 44 percent compatible with agroecology. Most funding went to programs like the Affordable Input Programme (AIP) and irrigation projects, which focus heavily on synthetic inputs.

- **Tanzania** devoted 9 percent of its budget to agriculture, with 27 percent supporting agroecology. Most funds were allocated to irrigation, but significant underspending hindered progress.
- **Zambia** allocated 7.4 percent of its agricultural budget, with only 24 percent compatible with agroecology. The input supply program focused on conservation agriculture but relied heavily on synthetic fertilizers and commercial seeds.
- **Zimbabwe** also allocated 7.4 percent of its budget, with 64 percent supporting agroecology. Programs like Pfumvudza and Command Agriculture reflected a stronger move toward sustainable practices (Action Aid, 2024).
- AFAT define agroecology based on the HLPE (High-Level Panel of Experts on Food Security and Nutrition) framework, which outlines 13 key principles of agroecology. These principles fully align with those of organic agriculture, emphasizing sustainability, local control, and community knowledge.

The findings reveal that, although existing national policies across sectors align to some extent with the principles of agroecology, they are largely framed within a broader focus on export-oriented agriculture, commercialisation (particularly through irrigation infrastructure and farm blocks), and the reliance on conventional farm inputs as a primary support strategy. Achieving sustainable agricultural development and long-term resilience against climate change and food insecurity will require greater investment and a realignment of priorities to fully embrace agroecology and organic farming.

Kenya

Kenya's Food System Transformation Pathway Plan seeks to address key challenges in the nation's food systems by promoting sustainable, resilient, and inclusive solutions. Agroecology is central to this approach, offering a pathway for eco-friendly and equitable food production that balances livelihoods, farm ecosystems, and the broader food system. While Kenya's Agricultural Policy 2021 and Vision 2030 acknowledge the potential of agroecology, the country still lacks a comprehensive national strategy to support its widespread adoption and scaling.

To bridge this gap, the government, in collaboration with the Intersectoral Forum for Agroecology and Agrobiodiversity (ISFAA), has launched the National Agroecology Strategy for Food System Transformation (NAS-FST) for 2024-2033. Guided by 13 agroecological principles (closely aligned with the FAO's 10 elements of agroecology), the strategy focuses on transforming Kenya's food systems across critical areas, including nutrition, health, environmental sustainability, and socio-economic outcomes. It also aims to scale up organic farming practices as part of the broader agroecological approach. These practices are crucial for improving soil health, increasing biodiversity, enhancing nutrition, and reducing reliance on synthetic inputs. The NAS-FST aligns with Kenya's sustainable development goals and the constitutional right to food and a clean environment. By incorporating agroecology and organic farming into national and county-level plans, it promotes biodiversity, climate resilience, food security, and sustainable livelihoods. Counties such as Murang'a,

Kiambu, Vihiga, and Busia are already leading the way in implementing these practices, providing valuable models for others.

Developed through a participatory process involving diverse stakeholders, the strategy outlines five key actions:

- 1 Promoting resilient and sustainable agriculture through agroecology, including organic farming.
- 2 Encouraging sustainable consumption and healthy diets.
- 3 Supporting policies and incentives for agroecology.
- 4 Strengthening research, innovation, and training in agroecological and organic methods.
- 5 Enhancing equity and participatory governance in the food system.

With an estimated cost of KES 26.8 billion, the strategy will be coordinated nationally by ISFAA and implemented locally through county working groups. By incorporating organic farming into its framework, the NAS-FST provides a robust pathway for creating a sustainable, inclusive, and healthier food system in Kenya (Republic of Kenya, Ministry of Agriculture and Livestock Development, 2024).

Uganda

The National Agroecology Strategy (NAS) is close to completion after an inclusive consultation process. The NAS will promote sustainable agriculture, enhance soil health, and improve food security, with the objective of strengthening a transition towards more fair and sustainable food systems in the country (La Via Campesina, 2024). Uganda shows clear commitment to moving away from industrial agriculture and turning to agroecology aligned with the organic principles. The first policy measures regarding extension services and vocational schools with training programs and curricula on agroecology are starting to bear fruits in the country.

Latin America

Latin America continues to expand its organic agriculture sector while adapting to stricter global regulations and emphasizing agroecology as a solution to environmental challenges. Regional efforts are supported by trade negotiations and national policies promoting sustainability and biodiversity.

Brazil

Brazil continues to lead in agroecological practices through the National Policy for Agroecology and Organic Production (PNAPO), introduced in 2012. This policy integrates sustainable farming into national strategies, aiming to improve rural development, enhance food security, and promote healthy diets. In a significant move on October 16, 2024, in commemoration of World Food Day, Brazil launched the 3rd National Plan for Agroecology and Organic Production (PLANAPO). This updated plan supports the production, handling, and processing of organic and agroecological products as part of Brazil's broader strategy to eradicate hunger by 2026 and promote sustainable development. It further strengthens the country's commitment to agroecology, sustainability, and food security.

Additionally, the Federal Government approved the First National Food Supply Plan – Food on the Plate (Planaab) for the period 2025 to 2028 and officially established the National Food Supply Policy (PNAAB). The initiatives outlined in this plan were made official on October 21, 2024. According to the government, the aim of Planaab is to establish a sustainable and efficient food supply system in Brazil, focusing on the most vulnerable populations and strengthening family farming (Governo Federal, Ministério Da Agricultura E Pecuária, 2024; Governo Federal, Secretaria de Comunicação Social, 2024).

Mexico

Mexico has also taken major steps toward promoting agroecology and organic farming, demonstrating its commitment to sustainable agriculture and food sovereignty.

Key developments include:

- **General Law on Appropriate and Sustainable Food (LGAAS):** Enacted on April 17, 2024, this law prioritizes food sovereignty, mandates warning labels for genetically engineered products, and enforces the precautionary principle in food policies (Otero Arnaiz et al., 2024).
- **Ban on Genetically Modified (GM) Corn:** In February 2024, a constitutional reform was proposed to ban the use and cultivation of GM corn. This measure aims to preserve Mexico's agricultural heritage, biodiversity, and food sovereignty (Calderón & Polo Anaya, 2024).
- **Support for Smallholder Farmers:** President Claudia Sheinbaum's administration is prioritizing self-sufficiency in white corn and offering increased support for small agricultural workers, emphasizing sustainable practices that avoid genetically modified organisms (Galeana, 2024).

Colombia

At the end of 2024, the Ministry of Agriculture and Rural Development adopted an ambitious public policy on Agroecology. The policy is a result of a broad consultative process including all stakeholders, which started in early 2023. The main objectives of the policy are to:

- Enhance agroecological education, extension and innovation processes in accordance with the social realities, knowledge and expertise of local peoples and communities.
- Promote agroecology and **alternative sustainable agricultural practices**, such as **organic farming**, along with the agroecological transition in the country's territories and agricultural production systems.
- Strengthen territorial processes of distribution, exchange, marketing and consumption of food and agroecological products.
- Contribute to the conservation of biodiversity, tropical agrobiodiversity and biocultural systems as a strategy to address the climate crisis.

- Encourage the recognition, participation and organization of groups in contexts of vulnerability and exclusion to enhance their capacities for human transformation with autonomy.

As the policy clearly defines its governance system, concrete measures are expected to derive from it in 2025 and the following years (Ministry of Agriculture and Rural Development, Colombia, 2024).

Asia

Asia is making significant strides in promoting agroecological and organic farming practices, driven by national strategies and regional frameworks. These efforts aim to enhance sustainability, combat environmental degradation, and improve food security across diverse agricultural systems.

Thailand

Thailand has developed two comprehensive action plans aimed at fostering sustainable agriculture, agroecology, and organic farming. While each plan has its specific focus, they collectively demonstrate the country's commitment to creating a resilient and environmentally responsible agricultural sector.

- The **Organic Agriculture Action Plan 2023–2027** aims to expand organic farming and enhance agricultural sustainability in Thailand. It targets increasing organic agriculture to 320,000 hectares and GAP-certified areas¹ to 400,000 hectares by 2027. The plan prioritizes improving organic production, certification, and marketing while supporting farmers with training, financial incentives, and market access. It also emphasizes research, innovation, and building an organic agriculture database to strengthen the supply chain and promote sustainability (SmartNetZero, 2024).
- The **Climate Change Action Plan for the Agricultural Sector 2023–2027** takes a broader approach, focusing on climate adaptation and mitigation. It seeks to improve water management, reduce greenhouse gas emissions, and promote sustainable land use, aligning with Thailand's goals of carbon neutrality by 2050 and net-zero emissions by 2065. Developed with lessons from previous strategies and stakeholder input, the plan addresses climate scenarios while incorporating sustainable practices like organic farming to reduce emissions and build resilience (UNDP, 2024).

Conclusion

The year 2024 brought some progressive policies, initiatives, and financial commitments across Europe, Africa, Latin America, Asia, and beyond that can support a possible transition towards agroecology and organic agriculture. Europe needs to keep its ambition with frameworks like the EU Green Deal. Africa, with strategies in

¹ GAP-certified areas refer to agricultural lands or farms that adhere to the standards of Good Agricultural Practices (GAP).

Kenya and Uganda, highlights agroecology's potential for climate adaptation and food security, though investment gaps persist. Latin America and Asia also showcase progress, with Brazil, Colombia, Mexico, and Thailand integrating agroecological practices into national strategies. While promising, more action is needed by aligning budgets with sustainable practices, scaling innovations, and ensuring inclusivity. Sustained collaboration, strategic investment, and technological advancements are essential to overcoming these barriers. As nations refine their approaches, agroecology and organic farming promise to transform global food systems, prioritizing sustainability, biodiversity, and equity for future generations.

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Participatory Guarantee Systems – Global Trends in 2024

CAROLINA DE JORGE¹

According to IFOAM – Organics International’s Global Map of Participatory Guarantee Systems (PGS), a total of 343 initiatives have been identified worldwide by 2024.²

Latin America remains the leading region in the number of PGS initiatives, with 149 initiatives, followed by Asia with 93 and Africa with 53 registered initiatives (Table 17, Figure 58).³

Table 17: PGS groups by region

Region	PGS Groups
Africa	53
Asia	93
Europe	28
Latin America	149
North America	2
Oceania	18
Total	343

Source: IFOAM PGS Survey 2024

Latin America accounts for 43 percent of global PGS initiatives. Asia follows with 27 percent, Africa with 15 percent, Europe with 8 percent, and Oceania with 5 percent. North America has the lowest number of registered PGS initiatives, with just two, representing 1 percent of the global total.

Of the total PGS initiatives, 79 percent are operational, while the remaining 21 percent are still under development (Table 18, Figure 58).

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² The PGS map by IFOAM – Organics International is available at <https://pgs.ifoam.bio/>.

³ General notes on the data

Every three years, IFOAM – Organics International conducts a global PGS survey. In 2024, the survey was conducted using the Global Map of PGS initiatives, bilateral remote communication with PGS initiatives coordinators, online national databases, and direct communication with competent authorities and PGS experts. No comprehensive survey was done in 2023. For some PGS initiatives, no new data was received; therefore, data from the previous year was used. PGS initiatives that have not submitted data for the past five years were considered to be no longer active and thus excluded from the current statistics.

In countries where PGS are recognised under the national organic regulation, data collected and published by competent authorities was used. This is the case in Brazil, Bolivia, Chile, Costa Rica, and India. Mexico and Peru also recognise PGS and general information is available online for those initiatives that are recognised by the competent authority, but many initiatives in both countries have been operational for years and are not included in the official registries, so additional data provided by local PGS experts and organic stakeholders was used, in addition to the official information available online.

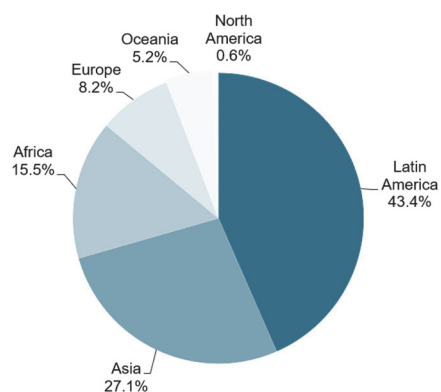
Table 18: PGS groups by status

PGS Status	PGS Groups
Operational	272
Under development	71
Total	343

Source: IFOAM PGS Survey 2024

PGS Groups by region 2024

Source: IFOAM PGS survey 2024



PGS Groups by status 2024

Source: IFOAM PGS survey 2024

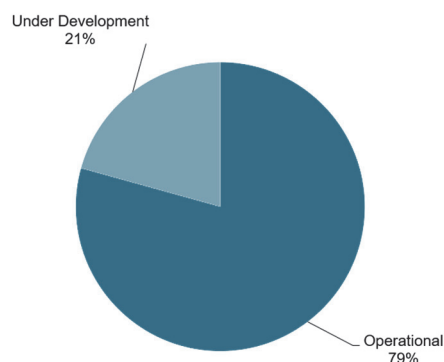


Figure 58: PGS Groups by region and status

Source: IFOAM PGS Survey 2024

A total of 1,212,263 hectares are currently registered as PGS-certified globally. Asia leads by a significant margin in terms of the area covered by PGS-certified land (Table 19).

Table 19: PGS-certified land by region

Region	PGS certified land [ha]
Africa	40'465
Asia	1'212'263
Europe	4'470
Latin America	14'237
North America	8'440
Oceania	13'415
Total	1'293'290

Source: IFOAM PGS Survey 2024

Latin America

As mentioned above, Latin America is the leading region in the development of PGS initiatives, with 149 initiatives registered in 2024. This represents 43 percent of the global total and accounts for 14,237 hectares certified through participatory guarantee systems (Table 20).

Specifically, within Latin America, Bolivia leads in the number of PGS initiatives, with a total of 45 registered initiatives.

Brazil ranks second, with 29 PGS initiatives. Notably, Brazil is home to some highly renowned and impactful PGS initiatives, such as the “Ecovida Association for Participatory Certification,” which involves a total of 5,662 producers.

Chile also has a significant presence, currently hosting 24 PGS initiatives.

North America

In 2024, a total of two initiatives were registered in North America, representing 1 percent of the PGS initiatives globally and 8'440 hectares of certified land (Table 20).

The “Certified Naturally Grown” initiative, based in the United States, involves a total of 750 producers, of whom 650 are certified. This initiative accounts for the entire 8'440 hectares of certified land.

In contrast, the “PGS Puerto Rico” initiative is still under development. Current records show it has successfully engaged 10 producers in its implementation so far.

Africa

The African continent accounts for 15 percent of global PGS initiatives, with 53 initiatives and a total of 40'465 certified hectares, according to the current records of IFOAM - Organics International's Global Map of Participatory Guarantee Systems (Table 20).

The country with the highest representation at the continental level is South Africa, with a total of 18 PGS initiatives, followed by Tanzania with six initiatives and Togo with five initiatives.

Globally, some notable PGS initiatives stand out, such as “The Economy of Love,” an Egyptian initiative recently registered on the map. It has a total of 4'399 certified hectares and involves 53 producers, all certified. Another prominent initiative is the Namibian Organic Association PGS, which accounts for 26'502 certified hectares.

Asia

With 93 PGS initiatives registered in 2024, Asia accounts for 27 percent of the global initiatives and has the largest area of certified land, totaling 1'212'263 hectares (Table 20).

Within the Asian continent, the Philippines stands out in terms of the number of PGS initiatives, with a total of 20 PGS initiatives at present, followed by Thailand in second place with a total of 15 PGS initiatives. As for the third position, there is a tie between Vietnam and Nepal, both with 12 PGS initiatives.

Among the registered initiatives, “PGS India” clearly stands out in terms of the number of producers and certified area, with 1’212’263 hectares and 1’922’790 producers involved.

Europe

The European continent represents 8 percent of the PGS initiatives on a global scale, with a total of 28 initiatives and 4’470 certified hectares. Spain is the leading country in terms of the number of PGS initiatives, with a total of 11. It is followed by Italy and France, which each have four initiatives (Table 20).

Oceania

Globally, Oceania accounts for 5 percent of the PGS initiatives registered on the IFOAM-Organics International Participatory Guarantee Systems Global Map, with a total of 18 initiatives and 13’415 hectares of certified land.

Within the continent, the leading country in terms of initiatives registered in 2024 is Fiji, with seven initiatives, followed by Australia with three initiatives.

At the local level, Fiji’s “Loving Islands PGS” initiative is particularly notable, involving 256 stakeholders, of whom 185 are certified. This initiative covers a total of 9’166 hectares of land certified through a participatory approach.

Conclusion

Participatory guarantee systems are a growing trend globally. Over the last 5 years, there has been an increase in the number of registered initiatives. In 2019, there were a total of 223 initiatives (166 operational and 57 under development), totaling 406’040 hectares of certified land). Whereas, in 2024, 343 initiatives have been registered in total (272 operational and 71 under development), totaling 1’293’290 hectares certified. This represents an impressive increase of 53 percent in the number of PGS initiatives and 219 percent in the number of certified hectares over the past five years.

Although PGSs are present in all regions of the world, Latin America continues to hold a leading position on a global scale in terms of the number of PGS initiatives. Asia, on the other hand, is the clear leader in terms of the number of producers involved and land certified through PGS.

Participatory Guarantee Systems

Table 20: Participatory Guarantee Systems by Worldwide 2023

Country	Number of producers certified	Number of producers involved	Operational initiatives	PGS-certified land [ha]
Africa	7'830	24'012	53	40'465
Benin	472	805	2	236
Burkina Faso	864	1'476	1	180
Burundi	0	4'820	1	
Cameroon	80	192	1	
Egypt	53	53	1	4'399
Ethiopia	0	30	1	
Ghana	62	526	3	2'120
Guinea	0	59	1	
Ivory Coast	0	35	1	
Kenya	1'078	1'587	1	1'442
Mali	250	1'352	1	112
Mauritius	0	0	1	
Morocco	55	61	1	352
Mozambique	167	167	1	0
Namibia	5	5	1	26'502
Nigeria	706	706	1	45
Rwanda	0	158	1	
Sao Tome and Principe	13	40	1	2
Senegal	306	500	1	382
South Africa	361	641	18	479
Tanzania	2'320	2'581	6	3'605
Togo	573	979	5	603
Uganda	450	7'224	1	
Zimbabwe	15	15	1	6
Asia	1'946'352	1'952'329	93	1'212'263
Bangladesh	0	123	1	0
Bhutan	0	100	1	
Cambodia	26	132	7	2
China	0	1'129	3	
India	1'933'041	1'933'641	5	1'196'403
Indonesia	369	558	2	136
Japan	6	8	1	2
Kyrgyzstan	1'097	1'097	1	2'667
Laos	334	500	3	773
Malaysia	26	115	1	
Mongolia	6	35	2	4
Myanmar	304	304	1	379
Nepal	171	288	12	15
Philippines	229	595	20	363
South Korea	780	2'200	1	207
Sri Lanka	408	837	3	224
Taiwan	233	729	2	500
Thailand	8'603	8'606	15	8'855
Vietnam	719	1'332	12	1'733
Europe	1'647	2'772	28	4'470
Belgium	90	224	2	
Bosnia	0	5	1	
Czech Republic	8	15	1	
France	1'064	1'798	4	250
Germany	38	38	1	2'670
Greece	0	0	1	
Hungary	0	10	2	
Italy	237	347	4	1'368
Spain	210	305	11	92
Turkey	0	30	1	90
Latin America	15'763	30'432	149	14'237
Argentina	20	40	2	170
Belize	0	5	1	
Bolivia	262	1'720	45	107

Participatory Guarantee Systems

Country	Number of producers certified	Number of producers involved	Operational initiatives	PGS-certified land [ha]
Brazil	8'908	9'054	29	2'696
Chile	264	264	24	908
Colombia	373	649	6	1'528
Costa Rica	69	74	7	187
Cuba	0	3'712	1	0
Ecuador	657	1'897	5	80
El Salvador	18	18	1	
Guatemala	25	50	1	1
Honduras	0	0	1	
Mexico	85	216	7	177
Paraguay	320	1'112	2	1'655
Peru	4'627	11'121	16	6'178
Uruguay	135	500	1	550
North America	650	660	2	8'440
Puerto Rico	0	10	1	
United States of America	650	650	1	8'440
Oceania	724	2'919	18	13'415
Australia	17	23	3	2'202
Cook Islands	4	17	1	23
Fiji	303	624	7	9'166
French Polynesia	67	115	1	323
New Caledonia	155	155	1	1'676
New Zealand	130	130	1	
Palau	0	0	1	
Samoa	0	190	1	
Solomon Islands	48	54	1	25
Vanuatu	0	1'611	1	0
Total	1'972'966	2'013'124	343	1'293'290

Source: IFOAM PGS Survey 2024

EU Rules Challenge Smallholder Farmers

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The new EU Organic Regulation 2018/848 requires that organic imports no longer be produced according to equivalent standards, as was previously the case, but strictly adhere to EU regulations. This makes the work of organic small-scale farmers in the Global South more difficult and will increase the cost of imports.

When the European Commission presented its proposals for a new EU Organic Regulation², it aimed to strengthen the rules for organic imports from third countries fundamentally. The goal was to create equal conditions for all and ensure that also imported products are 100 percent EU organic—as expected by European consumers and farmers. To achieve this, the equivalence principle of the old EU Organic Regulation 834/2007 was replaced by the compliance principle for imports. Under this new principle, organic producers in third countries must now fully comply with all EU rules unless the third country has signed a trade agreement for organic products or is recognised as "equivalent."

Additionally, the EU defined for the first time detailed legal requirements for group certification, domestically and abroad, to strengthen control. This change requires significant structural adjustments for many small farmer organisations. The EU Organic Regulation 2018/848 transition period for imports ends in 2024. However, to prevent supply disruptions, the regulation allows a derogation period until October 15, 2025. During the derogation period products certified in equivalence to the old regulation can still be imported, while their new certification is pending. This exception is due to delays in recognising third-country organic control bodies for compliance certification. Most control bodies fully switched to inspections according to the new Regulation in October or November 2024. Swiss organic imports are equally affected, as certification under the EU organic regulation is required for most imports from non-European countries.

Practical Challenges

The switch to compliance has introduced numerous new requirements for producers and traders in third countries. Several specific rules have significant practical implications:

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² Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007. Available at <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02018R0848-20241201> (Consolidated text)

- Many currently approved natural pesticides in third countries, which often use local plant extracts or microorganisms, are expected to be no longer permitted.
- External organic controls have become more complex and costly.
- Legal requirements, written from a European perspective and applied word-for-word, are difficult to understand for producers and businesses in third countries.
- The risk of decertification has increased due to the challenges of implementing European-specific rules in tropical agricultural systems.

In many developing and emerging countries, smallholder farmers are certified not as individual operators but as producer groups with an internal control system (ICS). Organic inspections verify whether the ICS operates efficiently and ensures traceability of goods. A sample of member farms is externally inspected. Regulation 2018/848 introduced detailed requirements for group certification for the first time, both in the EU and abroad. A “group of operators” may now only be composed of up to 2,000 members, all of whom must be organic or conversion farmers and must not exceed certain size or turnover thresholds.

Impact on smallholder groups

The Research Institute of Organic Agriculture FiBL conducted a study analysing the expected impacts of these changes, particularly on smallholder supply chains (Meinshausen et al. 2024a). The study is based on data from online surveys with producers in third countries and Europe, interviews, country-specific case studies, training sessions for producer groups on the new requirements, and producer and trade data analysis. It found that a wide range of organic products for the European market is produced significantly or predominantly by small organic farmers certified within producer groups.

Using data from Fairtrade International for approximately 850 Fairtrade producer organisations, production and import data for key products and countries, the FiBL study estimates that at least 1,800 to 2,000 organic producer groups, encompassing about one million organic producers, supply the European organic market and are affected by the new regulation. Two-thirds of all currently certified groups do not meet the new EU definition of a group of operators. They must adjust their legal and organisational structures to remain certified, which is often a challenging and time-consuming process with unpredictable effects on the organisation, e.g. in terms of taxes or liability.

Around 80 percent of producer groups and producers in third countries reported in the FiBL online survey (winter 2023/24) that they plan to adapt to the new regulation. However, due to the high complexity, only a few groups have implemented the necessary changes so far. Many groups have not fully understood the requirements or have not yet been inspected under the new regulation, making them only gradually aware of the challenges ahead.

Regional challenges

In Latin America, more than 500 producer groups (about 60 percent of all currently certified groups) must adjust their organisational structures to become groups of operators. Key reasons are that many cooperatives have also non-organic members and the fact that for some products like bananas, many smallholder farmers exceed the new size or turnover limits for group members. Stricter rules on authorised substances are also expected to create problems for organic cultivation, particularly for fresh fruits.

In Africa and Asia, an estimated 70 percent of currently certified producer groups must adapt their legal and organisational structures to continue EU organic group certification. Many groups are currently organised by processors or exporters, which will no longer be allowed. In Africa, a particularly high number of smallholder farmers are certified in groups exceeding 2,000 members.

In Turkey and other Mediterranean and Balkan countries, many key organic products for the European market are grown by smallholder farms currently certified as small groups under the certificate of the processing exporter, usually with 100 percent external inspection and no ICS. This certification model will no longer be permitted under the new EU regulation. Many smallholders are expected to transition to individual certification or form new producer groups with ICS or else stop organic certification.

Economic consequences

Many smallholder organisations are already struggling with increased costs, price pressures, and declining organic exports to Europe. Products like coffee and cocoa face significant challenges in complying with the EU regulation on deforestation-free products¹, which requires detailed proof that products are deforestation-free and comply with local laws with related necessary investments in traceability systems. Simultaneously, producer groups must implement the new EU Organic Regulation. Both adjustments are resource-intensive, and many groups report difficulties financing the necessary investments. Effects on external and internal certification costs vary considerably by group, depending on the changes required. External certification cost increases are expected to vary from around 10 percent increase up to five times higher costs (for some very large groups).

Experts predict that some supply chains or individual producers may decide not to pursue EU organic certification or lose their certification. This could lead to shortages and price increases for certain organic products, such as coffee, cocoa, bananas, other

¹ Regulation (EU) 2023/1115 of the European Parliament and of the Council of 31 May 2023 on the making available on the Union market and the export from the Union of certain commodities and products associated with deforestation and forest degradation and repealing Regulation (EU) No 995/2010 (Text with EEA relevance). Available at <http://data.europa.eu/eli/reg/2023/1115/oj>. The regulation originally applied end of 2024, but an additional 12-month phasing-in period was agreed on 3 December 2024.

tropical fresh products, and oilseeds. Many European importers and processors are only partially aware of the changes in third countries.

Supporting measures needed

The FiBL study concludes that the new EU Organic Regulation will strengthen the integrity of imported organic products in the medium to long term. It expects many organic supply chains to reassess the costs and benefits of organic certification for the European market and adjust their production and marketing accordingly. To mitigate negative impacts on smallholder farmers, the study recommends that policymakers, development organisations and the organic industry cooperate and provide support to ease the transition. Suggestions include:

- Organic traders in Europe are advised to support their smallholder value chains, e.g., by training, information and adapted contract conditions.
- Tailored training and technical support services for producer groups, control bodies and local consultants are essential.
- Financial and legal assistance: subsidies or support payments for initial investments and legal advice could help producer groups to adapt.
- Better understandable compilation of regulatory rules and training materials for organic production in third countries. Adjustments of selected requirements in the ongoing legislative process.

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Note

This article was originally published in the German quarterly magazine *Ökologie & Landbau*¹ (No. 4, 2024) under the title “EU-Regeln fordern Kleinbauern heraus”. It is available at <https://orgprints.org/id/eprint/54090/>. The text was slightly updated in January 2025 to reflect the latest regulatory changes and final study results.

The complete FiBL report “Impact of the New EU Organic Regulation on Smallholder Value Chains and the European Organic Sector” by Florentine Meinshausen, Toralf Richter and Beate Huber (2024) can be found on [orgprints.org](https://orgprints.org/54313): <https://orgprints.org/54313> (including annexes).

¹ More information about *Ökologie & Landbau* can be found at <https://www.oekom.de/zeitschrift/oekologie-und-landbau-5>

Developments in Organic Agriculture in Africa

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Introduction

The transition of current agriculture and food systems from their current sub-optimal state to more productive, resilient and healthy dietary-based systems is increasingly evident. Focus on Ecological Organic Agriculture (EOA) in Africa, one of the ways of achieving the transition, continues to receive attention from various stakeholders, including farmers, practitioners, researchers, policymakers, and others, particularly in the wake of global challenges, including health shocks, geopolitical conflicts, and environmental crises, among others. Growing evidence from a comparison of EOA and conventional systems demonstrates that EOA contributes to food security and nutrition, restores land degradation, alleviates poverty, mitigates climate change, and enhances resilience, among other socio-economic and environmental benefits. Such evidence was presented during the 1st Eastern Africa Agroecology Conference (EAAC) held in March 2023. Presentations at the conference highlighted the growth of EOA, the momentum it has gained, and the progress in organic policy adoption in countries such as Uganda and Tanzania. Building on this, the second Eastern Africa Conference is planned for March 25 to 28, 2025, in Nairobi.

The African Union Ecological Organic Agriculture Initiative (EOA-I)

The AU Ecological Organic Agriculture Initiative (EOA-I), supported by the Swiss Agency for Development and Cooperation (SDC), the Swedish Society for Nature Conservation (SSNC), European Commission through the Desira-Lift Initiative, among others, has impacted numerous smallholder farmers, academic institutions, policymaking organs and other stakeholders across Africa. In its current Strategic Plan,

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the initiative aims to integrate EOA into national agricultural production systems by 2025 to enhance agricultural productivity, food security, market access, and sustainable development in Africa. This objective is addressed through scaling up ecologically and organically sound strategies and practices, institutional capacity development, driving scientific innovations, stimulating market system development, enabling policies and programs, outreach and communication, efficient coordination, networking, and partnerships.

2.8 million farmers reached

The 2024 data shows approximately 2.8 million farmers (45 percent women, 55 percent men) received information and knowledge about Ecological Organic Agriculture (EOA) to promote its adoption. In addition, 1,281 value chain actors, including transporters, input suppliers, marketers, and consumers, were provided with various types of EOA information and data. This encompassed diverse areas such as crop management, soil health, organic seed production and management, value addition, market intelligence, and organic standards and certification. The capacity of approximately 10,000 farmers to embrace EOA and other agroecological practices was further enhanced through training and field exchange events organised at national, regional and continental levels by the implementing partners and executing agencies of the EOA-I.

Almost 90 percent of farmers adopting EOA

The adoption rate of EOA practices among smallholder farmers has been a key indicator for the success of the EOA Initiative in the nine implementing countries in Africa, as it reflects both the willingness of farmers to transition to organic methods and the effectiveness of outreach, training, and other support efforts. Household survey data reveals that an additional 7,378 farmers adopted EOA practices, bringing the total to 11,694 farmers (88.9 percent) as per 2024 data. By adopting EOA practices, smallholder farmers are better equipped to improve crop yields, maintain soil fertility, and build resilience against climate change effects while reducing adverse environmental impacts.

Fifty-five knowledge products validated and availed to farmers

Knowledge management, achieved through the development and dissemination of knowledge products, plays a pivotal role in promoting the adoption of EOA in Africa. In this context, a total of 55 EOA knowledge products were assembled, validated and availed to the public and, especially the farmers, for adoption. The knowledge products cover various topics including soil fertility management (preparation of quality manure and vermicompost), crop protection (crop rotation, mixed cropping, companion cropping), water harvesting and management, value addition in various agricultural enterprises, organic standards and certification, and livestock management.

Proportion of agricultural land under EOA

According to 2024 data, 86% of agricultural land managed by smallholder farmers in EOA project areas was converted to organic farming. This 37 percent increase

significantly exceeded the project target of a 10 percent increase for the entire EOA phase II.

Participatory Guarantee System (PGS) groups formed

According to 2024 data, the EOA Initiative also made significant advancements in establishing organic markets and enhancing market access by establishing PGS groups. These formations play a vital role in the organic sector by supporting the development of certified organic products at the local level. The PGS framework offers a cost-effective alternative for organic quality assurance through a participatory approach, avoiding the expenses associated with third-party certification. Operating through farmer groups, the PGS system uses collaborative processes such as learning exchanges, self-assessment, and peer evaluations to ensure credibility.

As of the reporting period (2024), 998 farmers had joined PGS groups, with 32 groups established across EOA project countries—177 percent above the target of 18 groups. Through these groups, countries are promoting a range of organic products, including vegetables, fruits, spices, tomatoes, soybeans, bananas, and pineapples.

EOA practices or elements implemented in the national policy framework

Aligned with efforts to integrate EOA into National policies, strategies, and programs across Africa, the Country Lead Organizations (CLOs) overseeing Pillar 4 of the SDC-supported EOA Phase II project have made significant progress in advancing EOA policy and advocacy within their respective countries with 19 related aspects, including policies, ordinances, legislations, plans, and strategies having been integrated into national policy across the nine EOA-I implementing countries. Further, 18 EOA-related programs have been implemented. An outstanding policy document to report is the National Ecological Organic Agriculture Strategy launched in Tanzania.

Achievements at the regional level

The African Union Commission (AUC), the Southern African Development Community (SADC), and the Ecological Organic Agriculture Initiative (EOA-I) Secretariat continued to strengthen Southern African platform by holding the African Union-chaired Continental Steering Committee (CSC) of the EOA-I in Gaborone, Botswana. A delegation of CSC members led by the African Union, the Economic Community of West African States (ECOWAS), and members of the Southern Africa Interim Technical Working Group (ITWG) on the EOA-I Southern Africa Platform was invited to the SADC Headquarters to discuss the development of EOA in the Southern Africa region. The ITWG comprises members from South Africa, Malawi, Zambia, Seychelles, Zimbabwe, Namibia, Botswana and Mozambique. During the CSC meeting, the much-anticipated Agroecology Promotion Programme, funded by SDC and implemented by different stakeholders in Africa, was launched. Biovision Africa Trust is coordinating the Africa component. The Programme has global, Southeast East Asia, and Africa components.

Policy works at the continental level

The African Union EOA Initiative (EOA-I), under the guidance of the African Union Commission's Department of Agriculture, Rural Development, Blue Economy, and Sustainable Environment (AUC-DARBE), has achieved significant milestones, including being a key institution in shaping the Comprehensive Africa Agriculture Development Program (CAADP) Post Malabo agenda. The EOA-I was part of the write shop team that reviewed and prepared the CAADP Post Malabo Strategy and Action Plan (2026-2035), endorsed in January 2025 during the historical Extraordinary Summit in Kampala, Uganda, and the following Kampala CAADP Declaration on Building Resilient and Sustainable Agrifood Systems in Africa. This marks the end of the implementation of the Malabo Declaration (2014-2025) and the birth of the third decade of CAADP to implement the Kampala Declaration (2026-2035). EOA-I was also involved in the Africa Fertilizer and Soil Health Summit, which came up with the Nairobi Declaration on soil health – a key factor in agroecology development in Africa. A continental outfit named the Soil Initiative for Africa is one of the summit's outcomes and is being implemented by FARA. Shortly after the summit, the EOA-I Secretariat hosted FARA in a meeting to jointly discuss how the EOA-I would take up the implementation of the agroecological outcomes within the Soil Initiative for Africa. EOA-I continued to expand its networking and partnerships and was privileged to host a delegation from the European Commission led by its Director General, International Partnerships (DG-INTPA), and the International Fund for Agricultural Development (IFAD) to discuss the development of Ecological Organic Agriculture/Agroecology in Southern Africa.

Borne out of the discussions is an agroecology promotion programme for Southern Africa led by IFAD, with the Ecological Organic Agriculture Initiative (EOA-I) secretariat leading the policy component. The European Commission, through the Desira-Lift Initiative, has funded a review of the current EOA-I Strategic Plan (2015-2025). The insights from the review will inform the development of a new EOA-I Strategic Plan (2026-2035). The Desira-Lift also funded a scoping study on farmer-managed seed systems (FMSS) for increasing agricultural productivity, food and nutrition security, and resilience. The study report was shared at the 5th Steering Group of the African Seed and Biotechnology Partnership Platform held in Nairobi in December 2024. The Steering Group also endorsed a continental Strategy and Action Plan on FMSS as well as a Policy and Advocacy Strategy for FMSS. The two policy documents are awaiting endorsement by the Africa Union's Specialized Technical Committee on Agriculture, Rural Development, Water and Environment. After the endorsement, they will become the official policy guides on the implementation of FMSS in Africa.

Further, the Ecological Organic Agriculture Initiative will continue to support data collection on its three indicators within the CAADP framework for the fifth biennial reporting period. Capacity-building activities have been planned for CAADP regional and national focal points to ensure that they better understand the EOA parameters and their data sources.

The Knowledge Centre for Organic Agriculture and Agroecology in Africa

Promoting Organic Agriculture & Agroecology in Africa has been promoted by various efforts, and prominently by the Knowledge Centre for Organic Agriculture and Agroecology by the German BMZ's¹ initiative "ONE World – No Hunger". The project leverages the multifunctional and sustainability-enhancing aspects of EOA/agroecology, which underlie the following benefits:

- Improvement of soil health, water and CO₂ storage in soils and resilience of agricultural systems (ecological sustainability).
- Enhancing the availability of healthy, high-quality food in local markets, even in rural areas, thereby addressing food security.
- Enable the development of organic and agroecological value chains that create employment opportunities for rural populations, particularly youth and women, contributing to economic sustainability.
- They foster sustainability by reducing reliance on synthetic fertilisers and pesticides, decreasing dependence on fossil fuels, and mitigating price fluctuations (economic sustainability).
- They empower and offer prospects for rural communities by gathering, processing, and disseminating knowledge on EOA/agroecology, thereby supporting social sustainability.

The KCOA project is coordinated by the German Agency for International Cooperation (GIZ). It aims to strengthen actors in regional knowledge hubs and their networks across Eastern, Southern, West, North, and Central Africa to promote organic agriculture and agroecology. The regional hubs are located as follows:

- West Africa: Senegal, Benin, Gambia, Mali, and Nigeria
- Eastern Africa: Uganda, Kenya, Tanzania, Rwanda, and Madagascar
- Southern Africa: Zambia, Namibia, South Africa, and Malawi
- Northern Africa: Egypt, Morocco, and Tunisia
- Central Africa: Hub based in Cameroon

The integration of these five regional knowledge hubs is addressed through four main strategies (for further details, refer to Amudavi et al. 2024): The Integrated Knowledge Management Systems Strategy, the Dissemination and Capacity Building Strategy, the Market Systems Development and Networking Strategy and the Advocacy Strategy.

Multiple activities of the regional knowledge hubs

So far, the KCOA project has achieved the following:

- The digital knowledge platform is functional and currently has with registration of 1,400 users;

¹ BMZ is the German Federal Ministry for Economic Cooperation and Development (Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung). More information is available on <https://www.bmz.de/en>.

- 1,000 knowledge products assembled and validated in over 20 different languages and uploaded on the digital knowledge platform ;
- 81 awareness and consumer education events on OA/AE promoted;
- 71 blog articles published from all over Africa;
- 19 million farmers and other value chain actors have been reached across the entire continent:
- 720 NGOs and food systems organisations have been connected;
- 1,100 farmers have been certified through participatory guarantee systems.

The Continental Digital Knowledge Platform is rapidly gaining momentum as a trusted source of information and a key hub for disseminating knowledge on organic agriculture and agroecology. It also serves as a dynamic platform for facilitating web-based networking with international and regional organisations, initiatives, and networks.

Governance and institutional development

New Agroecology Promotion Programme (APP)

The Continental Steering Committee (CSC), chaired by the African Union endorsed the launch of the new Agroecology Promotion Programme (APP) in Botswana in July 2024 as well as unveiled the interim Technical Working Group members for the Southern Africa EOA platform. The team will support in cementing the platform in Southern Africa by establishing its governance architecture.

During the July meeting, the CSC was informed about the conclusion of the EOA Phase II No Cost Extension period in April 2024. This followed the start of the new Agroecology Promotion Programme to be implemented in Africa. The new programme aims to contribute to three outcomes:

Outcome 1: Civil society drive change, as organisations, rural populations, women, youth, smallholder farmers, are empowered to act upon, demand, and implement improved food systems through agroecology;

Outcome 2: Policies for transformation, as policy-makers and governmental officials recognise the value of agroecology and adopt it as a means / compass to transform their national and regional food systems, and

Outcome 3: Markets developed, as market actors (consumers, producers, small and medium enterprises) gain further knowledge, networking and financial resources to align with agroecological principles and generate appealing and economically sound localised and healthy markets.

The activities of the new Agroecology Promotion Programme include two major convenings – the regional agroecology conference in 2025 in Eastern Africa and a continental conference planned for West Africa in 2027. The CSC officially endorsed the 2nd Eastern Africa Agroecology Conference to be held in Nairobi from 25 to 28 March 2025.

Data on the status of organic agriculture

Demonstration of evidence regarding the impact of ecological organic agriculture and agroecology needs to be expressed by policy and investment agencies. Efforts to gather reliable organic agriculture data in Africa are ongoing, including the development of indicators integrated into reporting processes and improved data collection for the future.

These indicators encompass:

- The presence of a national policy supported by budgetary allocation.
- The existence and implementation of organic regulations.
- Compliance with national standards and certification
- Level of government support for the organic sector.
- The involvement of civil society in EOA sector development.
- The performance of both domestic and export EOA markets.

Additionally, a study commissioned by the African Union, the Swiss Agency for Development and Cooperation and Biovision Africa Trust to assess EOA initiatives, programs, and projects across Africa sampled the five regions for Malabo-compliant National Agricultural Investment Plans and Regional Agricultural Investment Plans related to the African Union Decision on organic agriculture. The assessment demonstrated that agroecology is a viable alternative approach to conventional sustainable development and holds promise for addressing food security, environmental sustainability, and socio-economic challenges in Africa. Agroecology (including ecological organic agriculture) portends substantial economic gains by significantly boosting agricultural productivity. In some cases, smallholder farmers adopting AE principles could elevate yields of key crops like maize, cassava, rice, and vegetables by 30 to 50 percent (Fermont 2009), enhancing food security and creating surpluses for local and international markets.

Achievements by the African Organic Network (AfrONet)

The African Organic Network AfrONet is a pan-Africa umbrella organisation created in 2012 to bring organic actors, to network and foster the growth of the African organic sector. Its core activities include organising policy dialogue, capacity building, information dissemination, and providing support for organic value chain development and trade. The umbrella network creates alliances with national, regional, and continental networks, movements, and associations to advance organic agriculture in Africa. As a member of IFOAM - Organics International, AfrONet actively engages with key actors on the continent and globally.

Kilimohai Initiative Set Up

AfrONet participated in a workshop for the development of the Concept Note for the Kilimohai Label for East Africa: Investments in Sustainable and Dynamic Domestic Market Developments for Organic Agriculture and Agroecology for Eastern Africa, which was held in Zanzibar in September 2024. Kilimohai label is a certification system

supporting sustainable food systems, and it is aligned with Sustainable Development Goals (SDGs). The label, created in 2007, shows compliance with the East African Organic Production Standards (EAOPS) and aims to differentiate organic products in the market. It initially depended on donor support, but recent efforts by the Kenyan Organic Agriculture Network (KOAN) aim to make the label self-sustaining. This includes introducing a new “Kilimohai Agroecology” label and focusing on market development. The workshop involved National Organic Movements (NOAMs) of Kenya, Tanzania, Uganda and Rwanda. It looked deeply into the technical and organisational issues of promoting and rolling out the Kilimohai label in the four countries. The AfrONet President chaired the Joint Management Committee Meeting (JMC) to coordinate the Kilimohai Initiative, which is under development.

Assessment of National Organic Agriculture Movements/Networks (NOAMs)

AfrONet is in the process of assessing existing National Organic Agriculture Movements/Networks across the continent to evaluate their capacity to provide technical support and strengthen their operations. To facilitate this, AfrONet has developed a guiding tool for NOAM formation and strengthening.

West African Forum on Organic Agriculture

AfrONet was fully represented by three Board members in the West African Forum on Organic Agriculture and Agroecology held in Nigeria in October 2024. The AfrONet President chaired the General Assembly for the Western Africa Organic Agriculture Cluster, an event culminating in the Organic Agriculture and Agroecology Forum for West Africa.

AfrONet’s presence during the Zanzibar Organic Festival

AfrONet exhibited a strong presence and significantly contributed to the Zanzibar Organic Festival, held from September 21 to 29, 2024, at Nanenane Dole Grounds in Zanzibar. Organised by the Government of Zanzibar with the support of the Ministry of Agriculture, in collaboration with the Practical Permaculture Institute, the Zanzibar Commission for Tourism, the State University of Zanzibar (SUZA), and the Zanzibar State Trading Corporation (ZSTC), the event showcased Zanzibar’s rich natural heritage.

The AfrONet President delivered a keynote speech on behalf of Africa’s organic fraternity, emphasising the need for robust governmental support for organic agriculture and trade across the continent. The address highlighted organic agriculture as a key strategy for tackling the rise in non-communicable diseases, mitigating climate change, and addressing environmental degradation.

The President of Zanzibar and Chair of the Revolutionary Council, His Excellency Dr. Hussein Ali Mwinyi, graced the event as the Guest of Honour and delivered a keynote address.

Charting the way forward on Africa's preparedness for the transition following the new EU Plant Reproductive Material regulations

AfrONet participated in co-organising the Uganda Conference on the new EU Regulations in collaboration with the National Organic Agricultural Movement of Uganda (NOGAMU), the Dutch Centre for the Promotion of Imports from Developing Countries (CBI) and the United States Agency for International Development (USAID) Feed the Future programme.

The conference held in August 2024 attracted the physical participation of high-profile government officials as well as renowned actors of the organic sector in Uganda and beyond. The conference also attracted a significant number of online participants. As an outcome of the conference, several recommendations were made and accepted as a roadmap.

As a follow-up to the conference, AfrONet, in collaboration with the PELUM Association and Bread for the World, organised a major webinar in September 2024. The webinar focused on the implications of the proposed EU regulations on the production and marketing of plant reproductive materials (PRM) for African farmers and Africa's preparedness for the transition. Additionally, joint letters were written to the EU addressing these concerns.

To synthesise the voices and appeals of various organic stakeholders regarding the new EU regulations, the European Union resolved to delay the implementation of the regulations until October 2025.

Consultative process on the review of the East Africa Organic Products Standard

In November 2024, AfrONet, in collaboration with the International Institute for Sustainable Development (IISD), the East African Community (EAC), the East African Bureaus of Standards, and National Organic Movements (NOAMs), initiated a consultative process to discuss the findings and recommendations from an assessment regarding the East African Organic Products Standard (EAS 456:2007). The goal is to review and update the standard into the Draft East African Standard (FDEAS 456:2024), incorporating recent developments to meet the current demands of the organic business environment.

Consultations are ongoing towards this accomplishment. In the same vein, east African countries such as Kenya, Tanzania, Uganda and Rwanda have made good progress in registering the East Africa Kilimohai Mark in their respective countries. Burundi has yet to re-register the mark. Somalia, the Democratic Republic of the Congo (DRC) and South Sudan, which are new entrants in the community, will be integrated into the process at a later stage.

The 5th Africa Organic Conference held in 2023, and preparations for the 6th AOC in Lusaka, Zambia, in 2026

The African Organic Conference, a triennial gathering of organic practitioners in Africa, took place successfully in Kigali, Rwanda, from December 12 to 15, 2023. The conference convened 180 in-person attendees in Kigali, with an additional 120 participants joining virtually from across Africa and beyond. The event focused on

critical issues related to the advancement of organic agriculture in Africa under the theme “Strengthening Resilient and Sustainable Food Systems in Africa through Organic Agriculture.”

The Rwanda Organic Agriculture Movement (ROAM) hosted the conference, while AfrONet continued its role as the convener of the multi-stakeholder gathering. The conference culminated in a “Call for Action” addressing several key concerns, including:

- Adoption of Participatory Guarantee Systems (PGS) at continental, regional, and national levels;
- Quality control measures within organic production systems;
- Integration of organic farming practices across agricultural, trade, environmental, and related sectors;
- Long-term funding support for organic and agroecological research and experiments in Africa;
- Promotion of both domestic and international markets for organic products and initiatives to halt the importation of highly hazardous agricultural chemicals, prohibited globally and detrimental to organic farming, into Africa.

During the 5th Africa Organic Conference (AOC), Kenya and Zambia presented their candidacy to host the next 6th AOC. By the criterion of regional rotations, Zambia qualified to host the 6th AOC because Kenya is in the East African region, which hosted the 5th AOC. Preparations are underway ahead of the 6th African Organic Conference (AOC) in Lusaka, Zambia, in 2026.

Successful conclusion of the Institutional Innovations for Organic Agriculture in Africa (IIABA) project

The 4-year IIABA project (Institutional Innovations for Organic Agriculture in Africa), funded by the French Development Agency (AFD) and implemented in Uganda, Morocco, and Tanzania with a grant of 1,498,000 euros was successfully concluded and closed in 2024 after the completion of all administrative procedures and submission of deliverables. The donor expressed positive feedback about the status of project implementation and achievements made.

Among the key achievements are:

1. Formation of three digital platforms for organic product sales,
2. Existence of local organic markets in Uganda cities of Kampala and Entebbe, which are operational,
3. Open-source software for PGS peer review,
4. PGS Declaration,
5. UGOCERT, the Uganda’s organic certification body revitalisation,
6. The NOAMs Formation and Strengthening Guide,
7. Three public policy studies in Tanzania, Uganda and Morocco,
8. Launch of the National Ecological Organic Agriculture Strategy for Tanzania,

9. Inauguration of the PGS Council in Uganda,
10. Policy guide,
11. Organic Markets Observatory Tool,
12. Organic Consumer Studies and
13. PGS Best Practices Studies.

Participation in the new Agroecology Promotion Programme

Beginning May 2024, AfrONet is one of the five implementing partners of a flagship Agroecological Promotion Programme under the Africa component, coordinated by Biovision Africa Trust. Some partners from Southeast Asia and IFOAM - Organics International are also part of the programme.

The project aims to promote agroecology and Ecological Organic Agriculture as a pathway for transforming food systems. The programme is funded by the Swiss Agency for Development and Cooperation. This programme will run up to March 2028, and under AfrONet, the programme is envisaged to ensure that the continental organic movement has a strengthened, sustaining, and resilient umbrella organisation representing Africa on regional and continental levels through

- NOAMs capacity building,
- Policy dialogue facilitation,
- Stakeholder capacitation,
- Promotion of the organic value chain from production to consumption,
- Business planning and
- Information, innovations and knowledge sharing.

The Network of Organic Agriculture Researchers in Africa (NOARA)

NOARA, the Network of Organic Agriculture Researchers in Africa (www.noara.bio), aims to spearhead African organic agriculture research, extension, training, and value chain development, along with engaging in lobbying and advocacy efforts for organic and ecological agriculture research at high levels. In 2024, NOARA expanded its membership, welcoming new members from within and outside Africa, including Europe and North America. The network now boasts over 400 members from 29 countries, all dedicated to advancing organic agriculture in Africa.

During the year, NOARA achieved several milestones, including the publication of the 5th African Organic Conference (AOC) Research Track Proceedings, which can be accessed at <https://publications.noara.bio>. The 7th Volume of the Journal of Organic Agriculture and Ecology (AJOAE) is also under publication. The network also strengthened its partnership with the Research Institute of Organic Agriculture FiBL and presented in the Science Agenda segment of a 2024 BIOFACH event.

Additionally, NOARA received a grant from the Oak Foundation (<https://oakfnd.org/>) to evaluate the impact of agroecological and conventional farming systems on biodiversity within farmlands in Eastern and West Africa. The project will be executed in two countries from each region in 2025. Additionally, NOARA embarked on a roadmap to facilitate the National Organic and Agroecology Research Dialogue

(NOARA) across various African countries in the first quarter of 2025. This initiative is guided by comprehensive research questions designed to address identified gaps in collaboration with multiple stakeholders in the organic agriculture and agroecology sectors. The dialogue will contribute to the development of a demand-driven 10-year Organic Agriculture and Agroecology Research Agenda for Africa (OARA).

Furthermore, NOARA will organise the second African Organic Research Conference in November 2025. The event will be hosted in collaboration between northern and southern African country members of NOARA.

Conclusion

Redesigning food systems to address emerging global challenges is essential for achieving universally accessible, affordable, and healthy diets delivered through systems that are environmentally, economically, and socially sustainable. In response, various stakeholders in Africa, in collaboration with development partners, are actively investing in systems, innovations, and opportunities that promote sustainable food systems. These efforts aim to enhance the productivity, resilience, and profitability of smallholder farming systems across the continent.

These investments focus on areas such as research, the development of ecologically sustainable practices, and initiatives that foster markets for organic and agroecological produce. Collectively, they contribute to building sustainable food systems in Africa.

The growth and success of the organic sector and agroecology require the commitment of governments, farmers and their organisations, development partners, and the private sector. Investment in productive research, policy development, and programs that create platforms for experience-sharing, learning, and collaboration is vital. This unified effort provides a foundation for poverty reduction and ensures sustainable, long-term food and nutrition security across the continent.

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Organic Agriculture in Africa: Key Facts and Figures

JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER² AND MANUELA HELBING³

In 2023, the organic sector's development in Africa was characterized by significant growth in organic farmland, exports, and all key crops, despite persistent challenges in data availability for producers and domestic retail sales.

More than 3.4 million hectares of farmland were organic in Africa in 2023 – Uganda had the largest area

In Africa, more than 3.4 million hectares were managed organically in 2023. Over 3.4 percent of the world's organic farmland was in Africa. With more than 505'000 hectares, Uganda had the largest farmland area under organic management, followed by Ethiopia (nearly 439'000 hectares), Togo (over 322'000 hectares) and Burkina Faso (over 286'000 hectares). Nearly half of Africa's organic farmland was in these four countries.

African organic farmland increased by almost 669'000 hectares

Organic land increased by nearly 669'000 hectares in Africa in 2023, representing an increase of 24.4 percent. In the decade 2014 to 2023, organic farmland grew by 172 percent and thus at a faster rate as global organic farmland.

Sao Tome and Principe is the country with the highest organic area share in Africa

Organic farmland in Africa constituted 0.3 percent of the total agricultural land of the continent and was thus below the global organic area share of 2.1 percent in 2023.

The country with the highest organic area share was Sao Tomé and Príncipe, with an impressive share of 21.1 percent, thus making it on the world list of 22 countries with an organic area share of more than 10 percent of total farmland (and one of the six countries with a higher area share of 20 percent). Sao Tomé and Príncipe was followed by Togo with 8.4% share, and Sierra Leone with an organic farmland share of 5.4 percent.

Key crops grown are oilseeds, coffee, nuts, textile crops, cocoa and olives

More than half of the organic farmland in Africa is for permanent crops (1'936'482). Among the key crops was coffee (461'511 hectares), mainly from Ethiopia, and nuts (344'160 hectares) mainly from Kenya, Burkina Faso and Côte d'Ivoire.

Arable land accounted for approximately 40 percent of total organic land in Africa in 2023. Among the key crops were oilseeds (694'363 hectares) mainly from Togo, Nigeria, and Ghana, textile crops (339'462 hectares) mainly from Tanzania and Burkina Faso,

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Manuela Helbing, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

and medicinal and aromatic plants on arable land (68'903 hectares), mainly from Egypt and Madagascar.

Organic producers, processors and importers: Data situation not satisfactory

There were nearly 972'000 organic producers in Africa, with the largest numbers in Uganda (more than 404'000). More than a fifth of the world's organic producers were in Africa. Compared to 2022, almost 11'000 less (1.1 percent down) organic producers were counted. However, not all certifiers – who are the main source for data from Africa - provide data on the number of individual producers; hence it may be assumed that the number of producers is higher than the number shown in this report. A total of 1'148 exporters and 1'713 processors were counted. Again, reporting is not consistent over the years, and the data is not complete.

Retail sales: Data almost non-existent

Organic retail sales for Africa do not exist. Kenya is the only country that provides data occasionally. This does, however, not mean that there is no domestic market for organic products in Africa. Many countries have developed local markets.

Organic exports – strong growth continued

While data on the domestic market are almost non-existent, data on organic export volumes in metric tons to the European Union, which is the major export market for Africa, has been available since 2018.

Data show that in 2023 nearly 639'000 metric tons of products were exported from Africa to the EU and US, constituting 12 percent of all organic exports to these countries/trade blocks. In the 6-year period 2018 to 2023, African exports increased by more than 119 percent, thus considerably faster than global organic exports to the EU and US, which grew by only 17 percent in the same period.

Togo is the largest exporter

The largest African exporter was Togo (nearly 175'000 metric tons of products, 97 percent of which is soybeans and soybean cakes), followed by Ghana (69'000 metric tons, mainly soybeans and bananas) and Tunisia (65'000 metric tons, mainly olive oil).

Soybeans are the most important export product

With almost 308'000 metric tons and more than 48 percent of the African organic exports, soybeans and soybean products (more than 180'000 metric tons of soybeans and almost 128'000 metric tons of soybean oil-cakes) was the most important product group, followed by vegetable oils (69'000 metric tons, mainly olive oil) and bananas (52'000 metric tons).

For detailed data on organic agriculture in Africa, please refer to the tables provided in the Annex, section 2.1 Organic Agriculture in Africa: Tables, page 306

Organic Agriculture in Africa: Graphs

Africa: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025

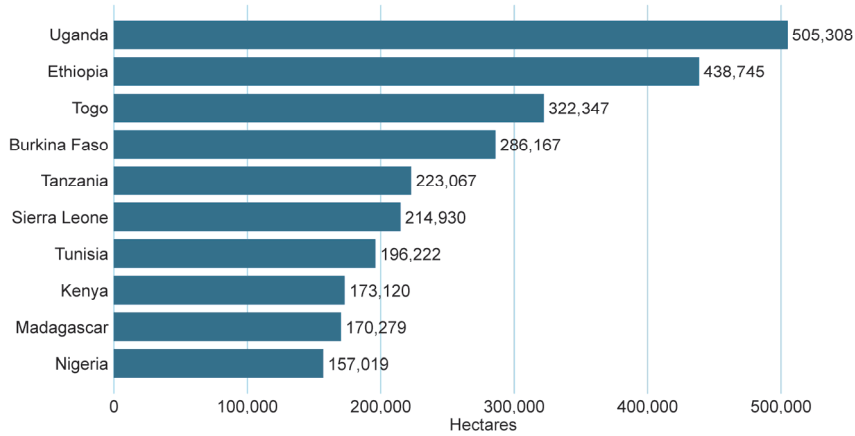


Figure 59: Africa: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Africa: The ten countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025

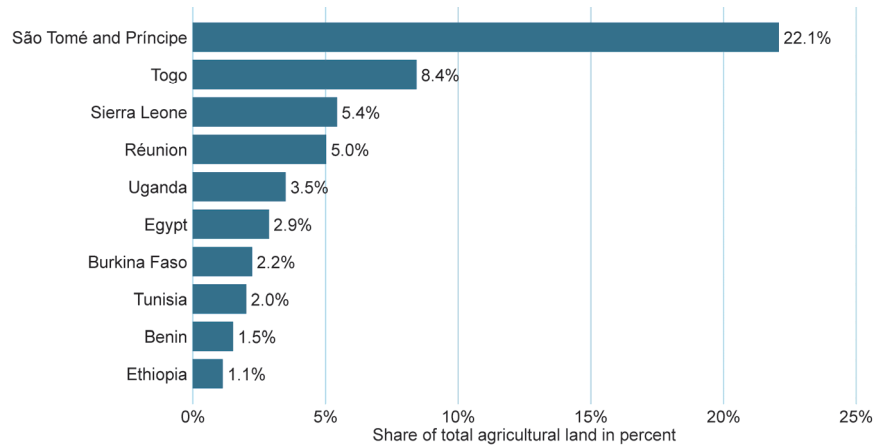


Figure 60: Africa: The countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Africa: Development of organic agricultural land 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

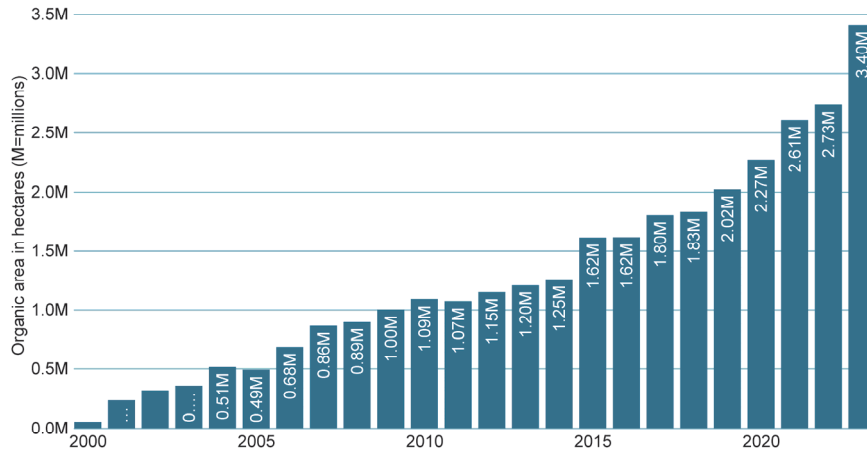


Figure 61: Africa: Development of organic agricultural land 2000-2023

Source: FiBL-IFOAM-SOEL-surveys 2001-2025

Africa: Use of organic agricultural land 2023

Source: FiBL survey 2025

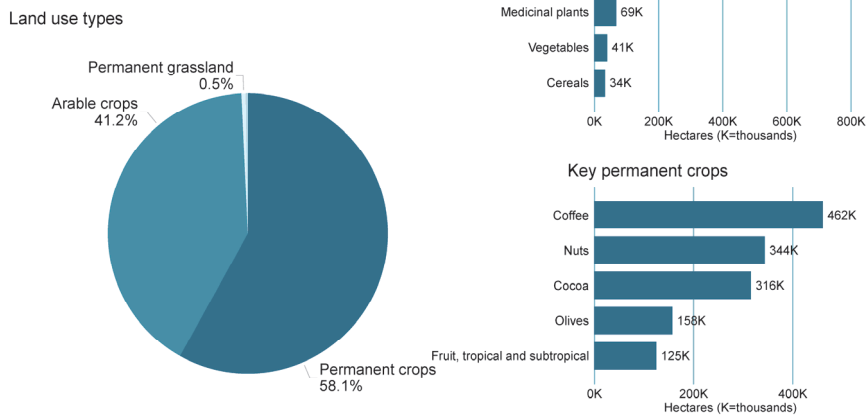


Figure 62: Africa: Use of organic agricultural land 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Africa: Key commodity groups exported to the EU and US in 2023

Source: Traces/European Commission 2024, GATS/USDA 2024

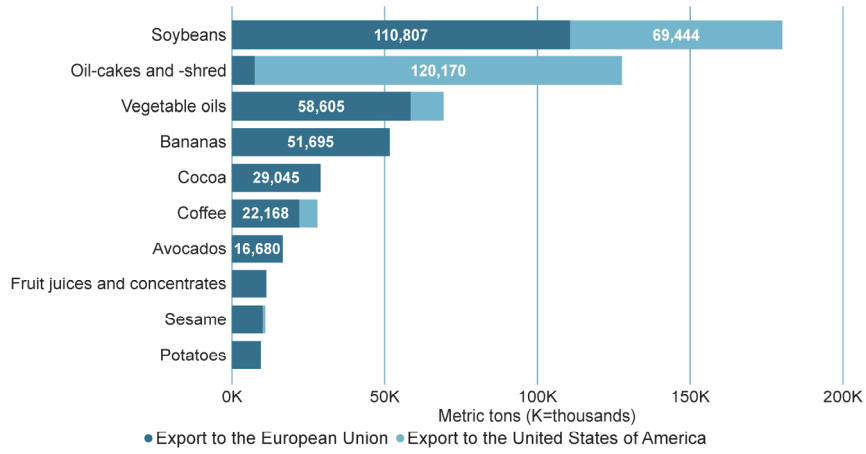


Figure 63: Africa: Commodities exported to the EU and US (export volume in MT)

Source: TRACES/European Commission, GATS/ USDA, compiled by FiBL. For detailed data sources, see annex, page 333.

Africa: Key EU and US export countries in 2023

Source: Traces/European Commission 2024, GATS/USDA 2024

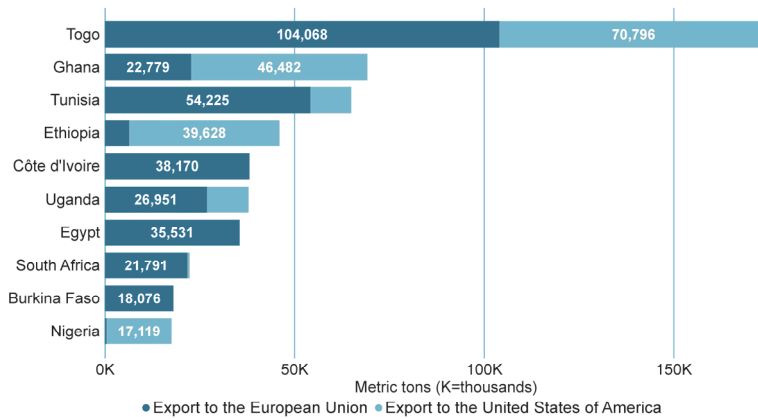


Figure 64: Africa: Key countries exporting to the EU and US (export volume in MT)

Source: TRACES/European Commission/GATS USDA, compiled by FiBL. For detailed data sources, see annex, page 333.

Asia



Asia: Organic share of total agricultural land

More than 0%  More than 2%

Map 3: Organic agricultural land in the countries of Asia 2023

Source: FiBL survey 2025 based on information from the private sector, certifiers, governments, and the Mediterranean Organic Agricultural Network (MOAN) for the Mediterranean countries
For detailed data sources, see annex, page 332.

Asia: Updates and Country Reports

IFOAM – ORGANICS ASIA¹

Robust growth in the organic sector continues in China with the introduction of over 160 local government support policies for organic agriculture and the issuance of more than 5 billion organic product labels. Japan reached a milestone in organic certification with 3 million hectares of certified organic land, driven by mandatory certification for organic livestock. Interest in providing organic food to schools is rising in East Asia, as seen in recent conferences held in South Korea, Japan, and Taiwan, where local governments are taking the lead. To further these efforts, an International Committee on School Meals and Public Procurement has been formed.

India plans to implement its new NPOP (National Programme for Organic Production) standard, an online traceability system for organic certification, and a unified Indian organic logo. Meanwhile, Iran celebrated the 18th anniversary of the Iran Organic Association (IOA) and the 10th anniversary of IFOAM-IRAN. Additionally, Saudi Arabia's Al-Jawf Agricultural Development Company earned recognition in the Guinness World Records as the largest modern organic olive farm, with over 5 million olive trees and an annual production exceeding 30,000 tons of organic olives.

Indonesia launched its first organic dairy program, focusing on young farmers, while Mongolia will enforce its Law on Organic Products starting January 2025. Türkiye continues harmonizing its organic legislation with European Union standards to enhance exports to the EU and the US.

Bangladesh

MOHAMMAD KHURSHID ALAM² AND SHAIKH TANVEER HOSSAIN³

Organic farming practices have been introduced to address the food security and safety challenges faced by approximately 1.2 million Rohingya refugees displaced from Myanmar. These refugees reside in overcrowded camps in Cox's Bazar with no access to work on local agricultural land and limited mobility to search for work. They rely entirely on humanitarian aid for their essential food items (mainly rice, flour, and oil) and have minimal access to fresh produce such as fruits and vegetables due to legal restrictions that confine them to the camps.

The Australian government has funded an organic kitchen garden project that includes sack vegetable gardening and roof gardening, utilizing biofertilizers and biopesticide

¹ IFOAM – Organics Asia, Chungbuk Organic Agriculture Research Institute, Seo-buri 751 Goesan-eup, Goesan County, Chungbuk Province, South Korea, <https://www.ifoamasia.org>

² Dr. Mohammad Khurshid Alam, Principal Scientific Officer, Bangladesh Agricultural Research Institute (BARI), Bangladesh

³ Dr. Shaikh Tanveer Hossain, Director Policy and Strategy, IFOAM – Organics Asia

techniques based on organic principles. Another initiative involves disseminating organic practices in the Chittagong Hill Tracts¹, where four villages in the Rangamati district have been selected to cultivate organic agricultural products, which are supplied to selected customers in Dhaka city.

The Rural Microenterprise Transformation Project (RMTP), under the Palli Karma-Sahayak Foundation (PKSF), has been implemented to sustainably enhance the income, food security, and nutrition of marginal and small farmers as well as micro-entrepreneurs across selected value chains. A policy strategy paper² has been adopted to advocate for government agencies and other stakeholders to implement strategies and standards aimed at transforming farming systems into sustainable models.

China

QIAO YUHUI³ AND LI FENG⁴

The certifications of green products, organic products, and services were further promoted to ensure the thorough implementation of the “Outline for Building a Strong Quality Country” and the “14th Five-Year Plan for Modernizing Market Supervision” Local governments have actively responded to the national emphasis on developing organic agriculture by introducing 163 relevant local policies.

According to the 2024 annual report titled China Organic Product Certification and Organic Industry Development, the number of labels issued for organic products in China exceeded 5 billion for the first time, and sales surpassed 100 billion yuan— 1.6 times the sales value in 2018. Over the past six years, the average annual growth rate of organic product sales has been 9.3 percent, making China the world’s third-largest organic market.

The State Administration for Market Regulation (SAMR) organized the launching ceremony of the *National Quality Certification Series Promotion and Experience Week* in Hefei, Anhui Province. During the event, SAMR announced the list of 42 experts for the 5th China Organic Product Certification Technical Working Group and launched the official account, China Organic Certification and Industrial Services, on WeChat and its website.

In March 2023, China and New Zealand held discussions to promote the mutual recognition of organic product certification systems. On October 17, 2023, China and Chile signed a Memorandum of Understanding on Cooperation in Organic Product Certification, establishing a long-term cooperation mechanism to promote trade and information exchange for organic product certification.

¹ Undertaken by the Bangladesh Organic Products Manufacturers Association (BOPMA) in collaboration with the Chittagong Hill Tracts Development Board (CHTDB).

² “Transformation into agroecological farming (beyond organic) for ensuring nutritious & safe food without compromising yield and reducing input subsidies on chemical fertilizer and pesticide in Bangladesh”.

³ Prof. Dr. Qiao Yuhui, China Agricultural University, Beijing, China

⁴ Li Feng, Director, China Office, IFOAM – Organics Asia, Beijing, China

Indonesia

EMILIA TRI SETYOWATI¹ AND WAHYUDI DAVID²

The Indonesian government, in partnership with the Danish government, has launched an initiative to support the development of Indonesia's first organic milk production. This collaboration focuses on establishing a model dairy farm that prioritizes animal welfare and sustainable agricultural practices. The project aims to develop a strategic roadmap for organic milk production in Indonesia, spanning from 2022 to 2026. Alongside providing training and mentorship to dairy farmers, the program will include a comprehensive review and formulation of organic standards specifically tailored to Indonesian dairy products.

Through the Ministry of Agriculture, the Indonesian government has also introduced the Youth Entrepreneurship and Employment Support Services (YESS) Program³, with assistance from the International Fund for Agricultural Development (IFAD). This program promotes the adoption of sustainable farming practices among young farmers by offering technical guidance, covering certification expenses, facilitating access to financial capital, and supporting both offline and online marketing efforts. Additionally, the program includes international internships with farming families in Taiwan.

The Indonesia Organic Alliance complements these initiatives by organizing organic youth camps, which involve 25 participants (17 males and 8 females) from across Indonesia. These camps aim to enhance youth engagement in agriculture, demonstrating that farming can be a viable and rewarding career path.

Progress in regional governmental support for organic agriculture has been noteworthy. The revised Indonesian National Standard (SNI) 6729:2016 is expected to be approved by late 2024 or early 2025. Furthermore, 14 district and city governments, along with five provincial governments, have enacted local regulations to facilitate the growth and regulation of organic farming practices.⁴

Policy on Organic Agriculture

In October 2024, the National Development Planning Agency (BAPENAS) launched the roadmap for the national action plan on the circular economy (2025–2045), which includes the adoption of organic agriculture systems to reduce the use of synthetic

¹ Emilia Tri Setyowati, Board Member of Organic Indonesia Alliance, Jakarta, Indonesia, Executive Secretary of Bina Swadaya Foundation

² David Wahyudi, Associate Professor, Universitas Bakrie, Indonesia, Board Member of the International Society of Organic Agriculture Research (ISO FAR)

³ Best Practices of YESS Programme, Pertanian Press, 2023: <https://polbangtanmalang.ac.id/upaya-kementan-dorong-peningkatan-produktivitas-petani-muda-di-malang/>

⁴ Regent and Regional Government Regulations

- › Regent Regulations of Samosir No. 10 of 2023 on Pangula Na Ture (Farming Properly and with Integrity).
- › Regent Regulations of Sleman No. 62 of 2023 on the Area-Based Development of Organic Agriculture.
- › Regional Regulation of East Luwu No. 13 of 2023 on the Organic Farming System.

fertilizers by 2045. The plan aims to decrease reliance on natural resources and increase the circular input rate by 2045.¹ By the end of the timeline, it is expected to replace 4.2 million metric tons of synthetic fertilizers annually. It also includes promoting local seeds, local production and local consumption.

The newly elected President has announced a new policy on agriculture and ecology, *Asta Cita* (2024–2029), under the framework of a green economy policy. Key actions include restoring degraded land and rehabilitating agricultural areas. Additional measures focus on optimizing the supply chain through the use of digital technology.

India

THOMAS JACOB²

The National Programme on Organic Production (NPOP), along with central government programs, has positioned India as the country with the largest number of organic farmers in the world.³

Special attention has been given to the development of organic farming in the Northeastern Region under the *Mission Organic Value Chain Development for Northeastern Region*. This initiative focuses on creating Farmer Producer Organisations to support farmers with organic inputs, quality seeds, planting materials, training, and certification.

To address climate change, the Indian government is implementing the National Mission for Sustainable Agriculture (NMSA), a key component of the National Action Plan on Climate Change (NAPCC). The Indian Council of Agricultural Research (ICAR), through its National Innovations on Climate Resilient Agriculture (NICRA) project, raises awareness about the impact of climate change on agriculture among farmers. Current schemes include Rainfed Area Development (RAD), On-Farm Water Management (OFWM), and Soil Health Management (SHM). For the period 2023–2026, the government has approved a Market Development Assistance (MDA) program to promote the use of organic fertilizers, making them available to farmers at reasonable prices.

In August 2024, the Union Cabinet approved the Clean Plant Programme (CPP), proposed by the Ministry of Agriculture and Farmers Welfare. This program aims to enhance the quality and productivity of fruit crops across the country, setting new benchmarks for excellence and sustainability in the horticulture sector.

The new NPOP standard has been drafted and will be implemented starting January 2025, featuring updated guidelines on ICS (Internal Control System) management. Additionally, the online traceability system for organic certification, Tracenet, has been

¹ Rencana Aksi Nasional Ekonomi Sirkular 2025-2045

² Dr. Thomas Jacob, Advisor, PDS Organic Spices, Kerala, India

³ Government of India, Ministry of Agriculture and Farmers Welfare, Department of Agriculture and Farmers Welfare: Lok Sabha, Unstarred Question No. 2458. To be answered on the 6th August, 2024: Organic Farming and Zero Budget Natural Farming. Available at the Government of India Website at https://sansad.in/getFile/loksabhaquestions/annex/182/AU2458_MuehX6.pdf?source=pqals

upgraded to a new version, effective January 2025. The enhanced system integrates a mobile app to facilitate the updating of purchases, internal inspections, the uploading of farmer documents, and geo-tagged photos.

The adoption of the Unified Indian Organic Logo is currently in progress and is expected to be officially introduced by January 2025.

Iran

DR. M. REZA ARDAKANI¹

Organic agriculture is developing in Iran, with growing interest among consumers, the private sector, governmental bodies, and academia. As one of the centers of agricultural evolution, Iran has a unique opportunity to leverage organic agriculture as a means of revitalizing traditional farming methods. The country is well-positioned to produce high-value organic products with global demand, such as saffron, pistachios, pomegranates, and medicinal plants.

On September 16, 2024, the 18th anniversary of the Iran Organic Association (IOA) and the 10th anniversary of IFOAM-IRAN were celebrated at the Iranian Chamber of Commerce, Industries, Mines, and Agriculture in Tehran. This event marked a significant milestone in promoting organic farming and sustainability in the country. Alongside the anniversary celebrations, an exhibition showcased the certified organic products of approximately 30 local producers. A diverse range of organic products was featured, including vegetables, rice, olive oil, tea, pistachios, saffron, honey, and medicinal plants, as well as organic inputs such as biofertilizers and bioproducts for plant protection.

As is the case in many Middle Eastern countries, the domestic market for organic products in Iran remains relatively small. However, there is a growing interest among organic producers in exporting their products. Major importers of Iranian organic goods include Germany, France, the United Kingdom, and countries in East Asia. Meanwhile, local demand for organic products is steadily increasing in parallel with consumer awareness and concerns about food safety issues.

Iraq

JWAD ENAD MAHDI²

The deterioration of soil health in Iraq due to the excessive use of chemical fertilizers has raised awareness within the agricultural community that transitioning to organic farming practices is essential to addressing soil-related challenges.

In 2024, the World Food Organization, in cooperation with the National Center for Organic Agriculture in Najaf Governorate, organized scientific seminars to promote organic agriculture. This one-year program trains farmers to produce organic fertilizers using tree waste and food scraps. Nearly 150 farmers from five governorates

¹ Dr. M. Reza Ardakani, Professor, Agroecology and Organic Farming, Azad University, Karaj, Iran

² Dr. Jwad Enad Mahdi, Director of the National Center for Organic Agriculture, Ministry of Agriculture, Iraq

participated in the training.¹ As a result of this initiative, the organically cultivated area in these governorates is expected to expand to 20,000 hectares. Furthermore, the development of marketing centers for organic products is anticipated to boost organic fertilizer manufacturing facilities.

Additionally, efforts are underway to establish a specialized association for organic agriculture, the Iraqi Society for Organic Agriculture, which aims to engage more than 100 farmers in each governorate of Iraq.

Japan

MIYOSHI SATOKO²

In 2024, Japan achieved a significant milestone as the land under organic certification reached 30'000 hectares for the first time. The implementation of mandatory certification for organic livestock contributed to the certification of more agricultural land. Government support policies facilitating the conversion to organic agriculture for both new and conventional farmers have also proven effective.

The number of Organic Villages increased to 129 as of August 30, 2024, well ahead of the government's set deadline. Organic ingredients were introduced into school meals by 193 local governments, including those in Organic Villages. The National Organic School Meal Conference, held in Omiya City, was attended by more than 1,200 participants, including mayors and members of the Japan Agricultural Cooperative.

To encourage farmers to adopt organic farming practices, nine agricultural universities and schools now offer organic farming courses and curricula.

Over 200 exhibitors participated in the 9th Organic Lifestyle EXPO in Tokyo, attracting more than 18,000 attendees. In 2024, the exhibition expanded to a regional location, with nearly 8,000 people attending the Organic Lifestyle EXPO East in Kyoto, which featured 117 exhibitors, including 12 municipal governments. *BioFach Japan* also resumed operations in Tokyo, and December 8 has been officially promoted by the Ministry of Agriculture, Forestry, and Fisheries (MAFF) as Organic Agriculture Day, celebrated by numerous organic businesses and initiatives.

Kingdom of Saudi Arabia

DEPARTMENT OF ORGANIC AGRICULTURE, MINISTRY OF ENVIRONMENT, WATER AND AGRICULTURE³

The Kingdom of Saudi Arabia spans a vast geographical area of 2 million square kilometers, resulting in varied topography and climatic conditions. This diversity contributes to the uniqueness of agricultural production and crop variety, known as the "Cropping Pattern," which is suited to the country's environmental and agricultural characteristics, thereby enhancing food security and providing national economic benefits.

¹ Najaf Governorate, Babylon, Karbala, Al-Qadisiyah and Baghdad Governorate

² Miyoshi Satoko, Executive Member, Organic Congress Japan, Tokyo, Japan

³ Department of Organic Agriculture, Ministry of Environment, Water and Agriculture, Riyadh City, Saudi Arabia. E-mail: dept-organic-agri@mewa.gov.sa, control.organic@mewa.gov.sa

A strategic product with significant economic impact is olive cultivation and olive oil, which holds a substantial market share in Saudi Arabia and internationally due to its nutritional and health benefits. The favourable environmental conditions in the northern region have enabled the Ministry of Environment, Water, and Agriculture to support the expansion of olive cultivation, improve the quality of olive fruits and oil, and facilitate their organic conversion and certification under the Executive Action Plan of the Saudi Organic Agriculture Policy.

As a result, organic olive groves in the Kingdom now cover more than 5,500 hectares, producing over 35,000 tons of olives annually. One of the key achievements in the organic sector is the recognition of the Al-Jawf Agricultural Development Company in the Guinness World Records as the largest modern organic olive farm, with over 5 million olive trees and an annual production exceeding 30,000 tons of organic olives.

Mongolia

CHOIJOO DOLGRSUREN¹

In January 2025, Mongolia will enforce its Law on Organic Products, approved by the General Assembly of the State Parliament. Thirty-two Participatory Guarantee Systems (PGS) and two third-party certification bodies will oversee conformity assessments of organic food products. The Ministry of Food, Agriculture, and Light Industry maintains an online Organic Food Registry and Database to efficiently track the certification status of organic products.

As of November 2024, Mongolia had over 180 producers engaged in organic farming, covering a combined area of 932.5 hectares. These producers supplied the market with 170 tons of vegetables and 8 tons of animal products, representing less than 1 percent of the country's agricultural output. Mongolia has set a target to achieve a 5 percent share of all agricultural products under organic certification by 2030.

The International Organic Accreditation Service has conducted initial accreditations for two certification bodies in Mongolia. A comparative assessment of equivalency between Chinese and Mongolian organic regulations is underway, aimed at enhancing international compliance, particularly with China, Mongolia's primary trading partner. One notable success story is MonPellets LLC, recognized for its organic sheep wool fertilizer. Over the past five years, the company exported 412 tons of organic sheep wool fertilizer, generating sales of 2.7 billion MNT. Additionally, 1,130 youth herders from 19 provinces received free training in sheep wooling, with 27 of them further trained as trainees and employees in New Zealand.

¹ Choijoo Dolgrsuren, Senior Analyst, Department of Policy and Planning, Ministry of Food, Agriculture, and Light Industry (MOFALI), Mongolia

Pakistan

NOSHIN ILYAS¹

The government of Pakistan has incorporated sustainable agriculture into its broader agricultural development plans, emphasizing reduced pesticide use, soil conservation, plant biodiversity preservation, and climate-resilient practices.

CABI International, an intergovernmental non-profit organization, conducted a workshop on the "Review and Validation of Organic Agriculture Standards and Framework Accreditation for Pakistan." In collaboration with the Ministry of Food Security and Research (MFSR), it is preparing a concept note on the *Organic Agriculture Act* for approval.

In 2024, the Baluchistan Organic Agriculture Policy and other initiatives were approved, focusing on environmental sustainability, economic growth, and enhancing farmers' resilience to climate change. Additional provincial initiatives include Punjab's focus on sustainable agriculture practices, an organic conference organized by the government of Gilgit-Baltistan, and research on organic fertilizers and biofertilizers conducted by the government of Sindh.

The Ayub Agricultural Research Institute (AARI) in Faisalabad is actively promoting organic agriculture through various initiatives, including raising awareness among farmers, organic wheat production, and vermicompost development.

Organic Pakistan, a private organization, participated in *Future Fest 2024* as a Knowledge Partner to explore the future of organic agriculture. The Pakistan Organic Association has also launched an organic e-store and organized stalls of organic foods at farmers' markets.

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Pakistan Organic Association: <https://pakorganic.org>

¹ Dr. Noshin Ilyas, Associate Professor, Department of Botany, Faculty of Sciences, PMAS Arid Agriculture University, Rawalpindi, Pakistan

Turkey**ÖZGE ÇİÇEKLI¹**

In Türkiye, certified organic food and non-food products, including textiles and cosmetics, are produced in compliance with official or private standards. Regular data collection is managed by the Turkish Ministry of Agriculture and Forestry for products certified under national Turkish legislation. The database shows an increase in the area and number of producers from 2022 to 2023.

Efforts are ongoing to develop organic agricultural production in line with the Sustainable Agriculture Target outlined in the Turkey Green Deal Action Plan published in 2021. Additionally, harmonization of Turkish organic legislation with standards of the European Union (EU) is being pursued with the European Commission. Although Türkiye's earlier application for mutual recognition in organic agriculture with the EU had progressed significantly, it could not be finalized due to changes in the EU system.

The Ministry of Agriculture and Forestry supports organic farming through payments based on unit land area to farmers registered in the Farmers Registry System and the Organic Farming Information System. Organic beekeepers must also be registered in the Beekeeping Registry System. The Ministry reviews and adjusts support levels for certified organic land and activities annually.

Vietnam**DANG THI BICH HUONG²**

By the first half of 2024, Vietnam had approximately 194,555 hectares of organic farming area, representing about 0.7% of the country's total agricultural land (as per data of the Vietnam Organic Agriculture Association VOAA). The market is showing positive growth, with increasing demand for organic products evidenced by a rise in imports of EU- and USDA-certified organic products and an expansion in the number of safe and organic food stores and chains.

Following the United Nations Climate Change Conference (COP26), Vietnam has implemented several programs to achieve green growth objectives. In December 2023, the Ministry of Agriculture and Rural Development issued two decisions.³ However, these documents do not appear closely linked to the National Organic Agriculture Development Project 2020–2030, which aims to increase the organic agricultural area to 2.5 to 3 percent by 2030.

VOAA continues to promote communication, training, and awareness-raising among stakeholders in the organic product chain. The association also supports organic trade

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² Dang Thi Bich Huong, Vice Chairwoman and General Secretary, Vietnam Organic Agriculture Association (VOAA), Hanoi, Vietnam

³ Decision No. 5190/QĐ-BNN-BVTV approving the Project on Development of Organic Fertilizer Production and Utilization until 2030, with a vision towards 2050, and Decision No. 5415/QĐ-BNN-BVTV approving the Project on Development of Biological Plant Protection Products until 2030, with a vision towards 2050

promotion activities, aiming to create market-driven momentum to boost production growth.

In September 2025, VOAA and IFOAM – Organics Asia will co-organize the 8th Organic Asia Congress in Ninh Binh Province to enhance awareness of the importance of organic agriculture and foster international and regional cooperation.

IFOAM – Organics Asia

SHAIKH TANVEER HOSSAIN¹ AND JENNIFER CHANG²

The most significant achievement of 2024 was the legal registration of IFOAM – Organics Asia as a “foreign NGO” in China, expanding its base of legal operations from South Korea (head office), the Philippines (Southeast Asia Office), and Bangladesh (South Asia and Middle East Office). This accomplishment reflects a decade of cooperation and mutual trust-building with central and local governments and the organic sector in China.

Developing organic school meals and public procurement remains a core strategy for IFOAM – Organics Asia. Discussions continued with regional and international partners at the 2nd Organic Districts World Congress in Idanha-a-Nova, Portugal, and the 2nd International Conference on School Meals and Public Procurement, co-hosted by the ALGOA Center for Public Procurement and the Global Alliance of Organic Districts in New Taipei City. The International Committee on School Meals and Public Procurement (ICMP) was established to initiate regional and international cooperation on future action programs.

IFOAM – Organics Asia co-organized the 1st International Participatory Guarantee Systems (PGS) Summit with the Department of Agriculture and the National Organic Agriculture Program of the Philippines to celebrate “20 Years of PGS Development, Growth, and Achievements.” Participants from more than 16 countries presented best practices alongside over 200 local organic stakeholders and PGS practitioners.

The 2nd edition of the Global Organic Agricultural Innovations was published in collaboration with Universitas Bakrie Press, Indonesia, with support from the People’s Government of Xichong County, China. It features 74 contributions showcasing major innovations in organic agriculture from 18 countries and regions worldwide.

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² Jennifer Chang, Executive Director, IFOAM – Organics Asia, Chungbuk Organic Agriculture Research Institute, Seo-buri 751 Goesan-eup, Goesan County, Chungbuk Province, South Korea, <https://www.ifoamasia.org>

In 2025, IFOAM – Organics Asia plans to continue building the Dryland and Deserts Organic Agriculture Network (DOAN), launched in 2023. Other initiatives include the regional “Organic Festa Asia” in Shanghai, China (September 2025), an international gathering of indigenous peoples, and the activation of the Education-Research for Organic Agriculture Development (E-ROAD) project.¹

¹ Launched in 2023, E-ROAD aims at to consolidate an alliance of universities and colleges with organic agriculture curricula, to exchange information and expertise on creating a common curricula and training programs on organic agriculture.

Organic Agriculture in Asia: Key Facts and Figures

JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER² AND MANUELA HELBING³

In 2023, the organic sector's development in Asia was characterized by steady expansion in organic farmland, strong producer engagement led by India, and challenges in export performance due to a continued decline in export volumes, alongside insufficient data on domestic retail markets.

More than 9.1 million hectares of farmland were organic in Asia in 2023 – India had the largest area

In Asia, more than 9.1 million hectares were managed organically in 2023. Nine percent of the world's organic farmland was in Asia.

With more than 4'475'837 hectares, India had the largest farmland area under organic management, followed by China (3'420'457 hectares), Kazakhstan (191'283 hectares) and Philippines (187'425 hectares). More than 90 percent of Asia's organic farmland was in these four countries.

Timor-Leste is the country with the highest organic area share in Asia

Organic farmland in Asia constituted 0.6 percent of the total agricultural land of the continent and was thus below the global organic area share of 2.1 percent in 2023.

The country with the highest organic area share was Timor-Leste (9.2 percent), followed by India (2.5 percent) and Sri Lanka (2.5 percent).

Asian organic farmland increased by almost 0.4 million hectares

Organic land in Asia increased by more than 369'000 hectares from 2022 to 2023, which represents a 4.2 percent increase. Over the decade from 2014 to 2023, organic farmland grew by 160 percent, significantly outpacing the global growth rate of organic farmland.

Key crops grown: cereals, oilseeds crops and textile crops

More than 44 percent of the organic farmland in Asia is for arable crops (4'040'433 hectares). Among the key crops are cereals, mostly wheat and rice, (1'974'177 hectares) and oil seeds (720'451 hectares), mainly in China, and textile crops (671'767 hectares), mainly in India.

Permanent crops accounted for approximately 12 percent of total organic land in Asia in 2023. Among the key crops were coconuts (275'738 hectares), mainly in the Philippines, and tea and mate (242'815 hectares) and nuts (177'119 hectares), both mainly in China.

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³ Manuela Helbing, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Organic producers, processors and importers: India leads with almost 2.5 million producers

There were more than 2'578'000 organic producers in Asia. Most of the farmers were in India, which is the country with the largest number of farmers worldwide (over 2'358'000). Almost sixty percent of the world's organic producers were in Asia. Compared to 2022, nearly 148'000 less organic producers were counted (-5.4 percent), mainly due to the decrease of producers reported from India (-122'592) and Thailand (-89'917). A total of 1'213 exporters and 12'698 processors were reported.

Retail sales: Insufficient information on the organic food market in Asia

Organic retail sales numbers for Asia are not sufficient. Only 8 countries with organic farmland provided organic retail sales figures. Of these countries, only China and India provided an update for 2023. Total organic retail sales reported in 2023 reached nearly 15.5 billion euros. This does not, however, mean that there is no domestic market for organic products in the other Asian countries. Many countries have developed local markets.

Organic exports

While data on the domestic market are not sufficient, data on organic export volumes (metric tons) to the European Union, which is the major export market for Asia, has been available since 2018. Export data to the US has been available even for longer (since 2014) but are less significant (21.7 percent of all exports to the EU and US in 2023) and do not cover all exported products.

Data show that in 2023 almost 606'000 metric tons of products were exported from Asia to the EU and US, constituting 11.5 percent of all organic imports to these countries/trade blocks. Since 2018, there has been a continuous annual decrease, amounting to a total reduction of 39.7 percent or -399'334 metric tons.

China is the largest exporter

The largest Asian exporter to the US and EU was China (over 206'000 metric tons of products, mainly oil cakes, culinary plants and beans, followed by India (almost 158'000 MT, mainly rice, oil cakes and sugar) and Pakistan (nearly 56'000 MT, mainly rice).

Oil-cakes are the most important export products

Comprising more than 192'624 metric tons and nearly 32 percent of Asian organic exports, oil cakes were the most important product group (mostly soy oil-cakes: over 192'000 metric tons), followed by rice (117'791 MT) and sugar (56'557 MT).

For detailed data on organic agriculture in Asia, please refer to the tables provided in the Annex, section 2.2 Organic Agriculture in Asia: Tables, page 310.

Organic Agriculture in Asia: Graphs

Asia: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025

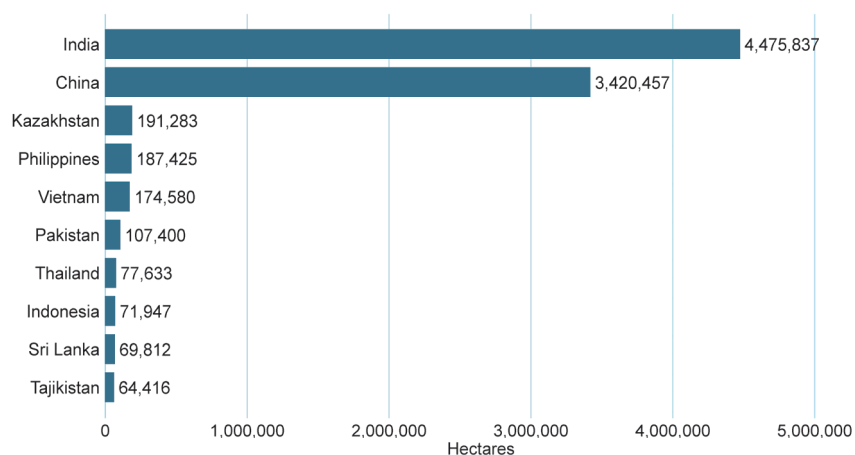


Figure 65: Asia: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Asia: The ten countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025

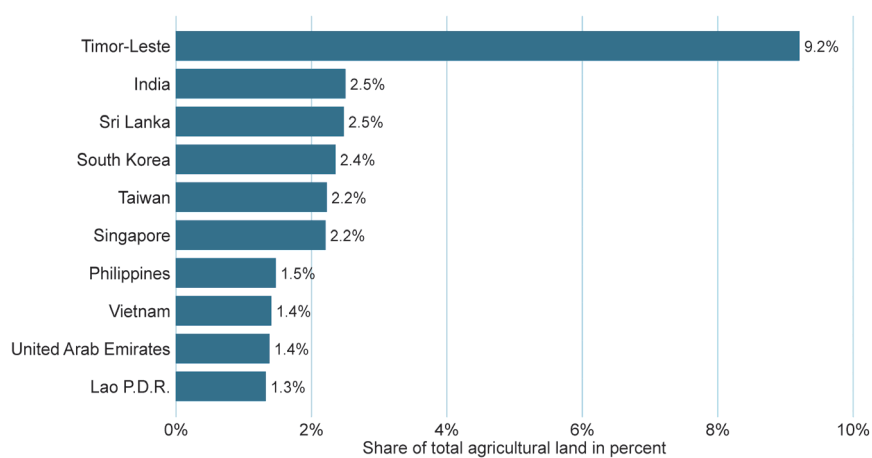


Figure 66: Asia: The countries with the highest organic share of total farmland 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Asia: Development of organic agricultural land 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

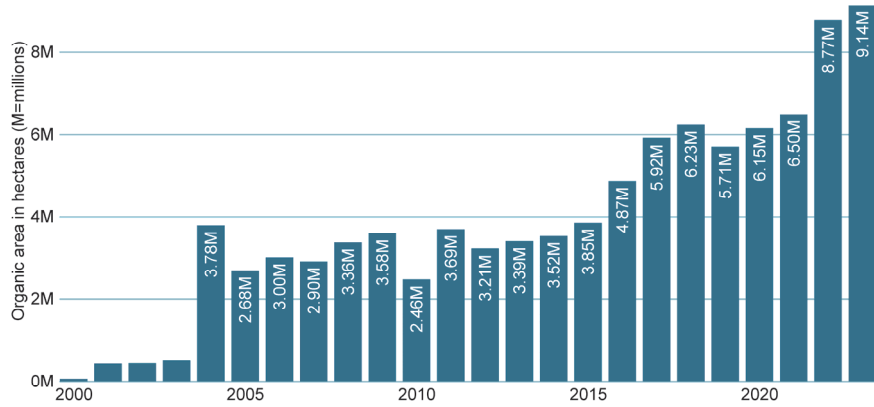


Figure 67: Asia: Development of organic agricultural land 2000-2023

Source: FiBL-IFOAM-SOEL-surveys 2001-2025

Asia: Use of organic agricultural land 2023

Source: FiBL survey 2025

Land use types

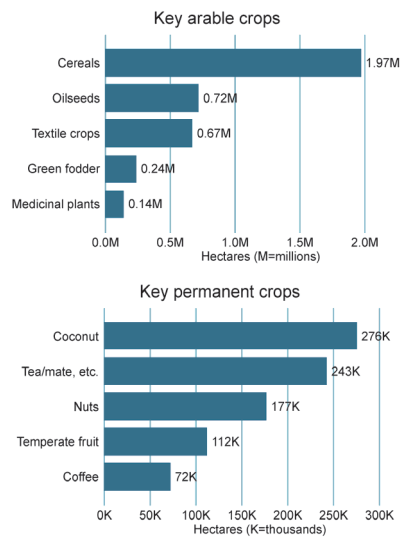
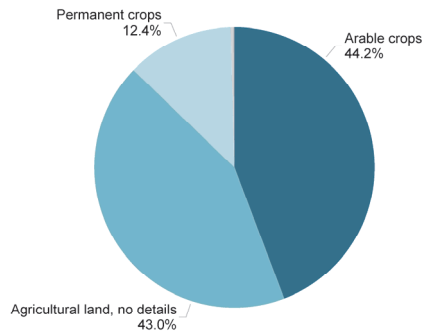


Figure 68: Asia: Use of organic agricultural land 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments.

Asia: Key EU and US export countries in 2023

Source: Traces/European Commission and GATS/USDA

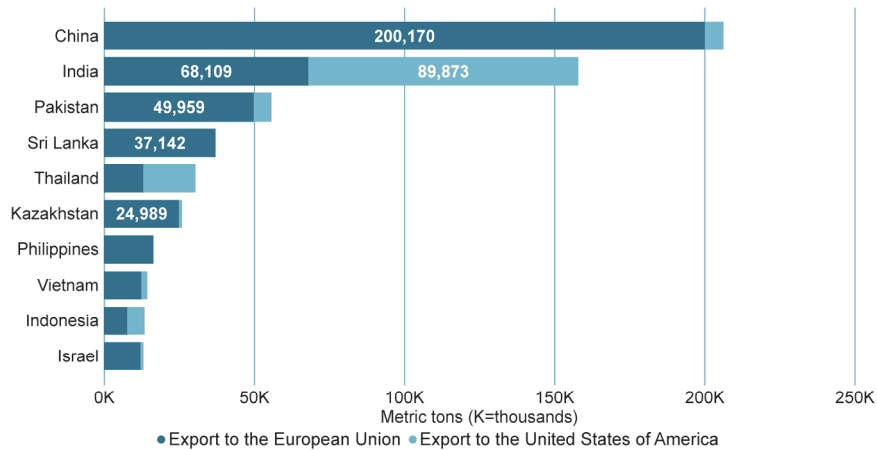


Figure 69: Asia: Key countries exporting to the EU and US (export volume in MT)

Source: GATS/USDA 2024 and TRACES/European Commission 2024

Asia: Key commodities exported to the EU and US in 2023

Source: Traces/European Commission and GATS/USDA

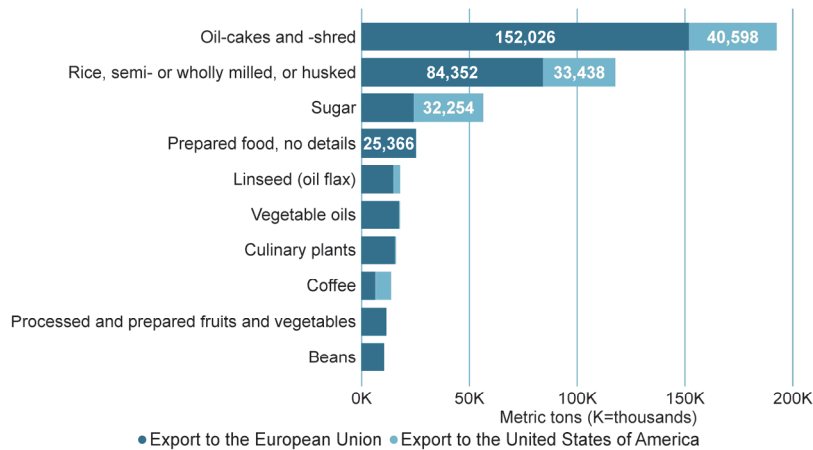
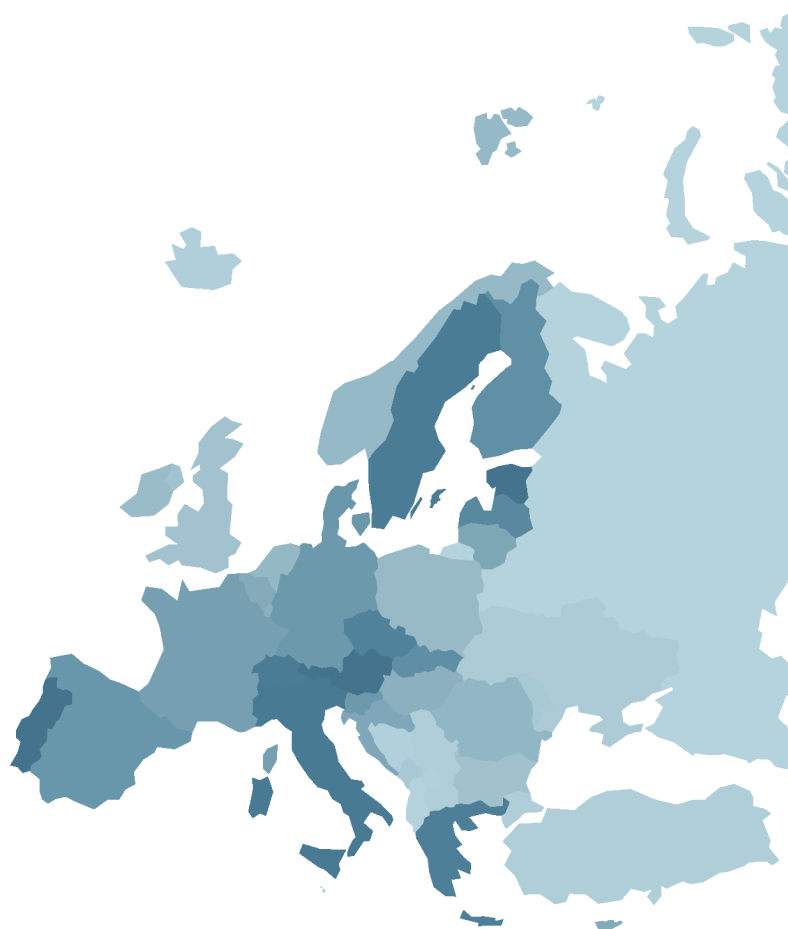


Figure 70: Asia: Key commodity groups exported to the EU and US (export volume in MT)

Source: GATS/USDA and TRACES/European Commission 2024

Europe



Europe: Organic share of total agricultural land

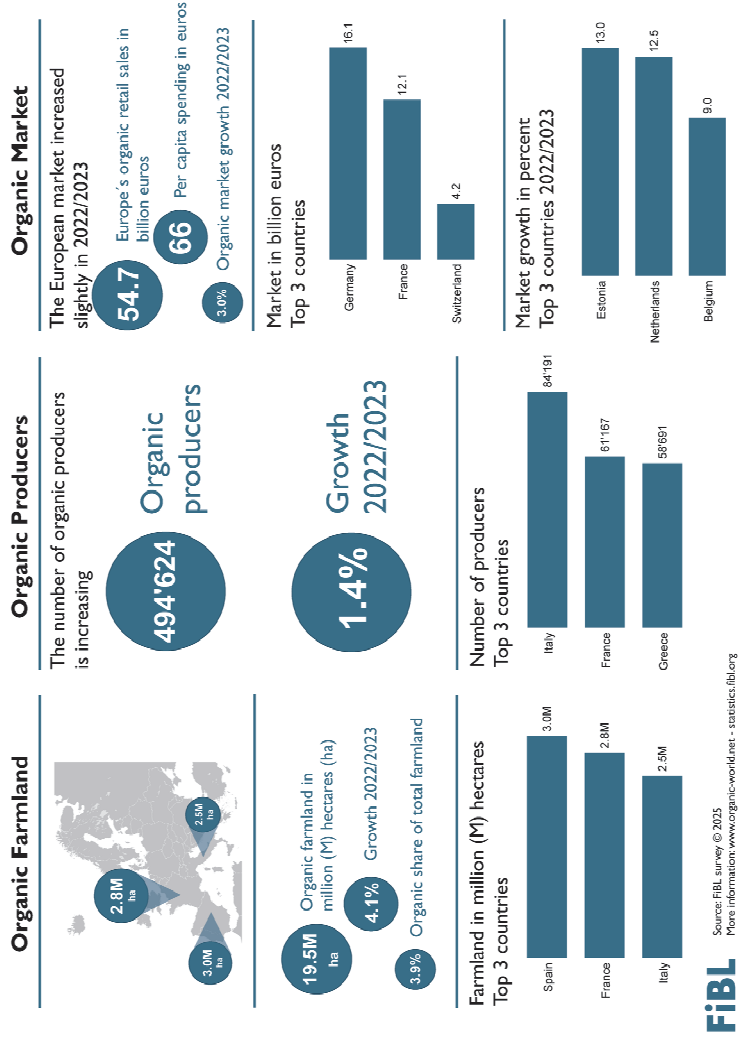
More than 0%  More than 20%

Map 4: Organic agricultural land in the countries of Europe 2023

Source: FiBL survey 2025 based on information from the private sector, certifiers, governments, and the Mediterranean Organic Agricultural Network (MOAN) for the Mediterranean countries
For detailed data sources, see annex, page 333.

Infographic Organic Agriculture in Europe

Organic Agriculture in Europe 2023



Infographic 6: Organic Agriculture in Europe 2023

Source FiBL survey 2025

Organic in Europe: Recent Developments

MARIA GERNERT¹, KARIM JOUHARI², HELENE SCHMUTZLER³, MARIA ZINTL⁴, LAURA SAUQUES⁵, HANNA WINKLER⁶ AND SILVIA SCHMIDT⁷

EU Organic Regulation - with a focus on imports

In June 2018, the European Union introduced Regulation 2018/848⁸, focusing on the production and labelling of organic products, and its implementation started on January 1, 2022⁹. Since then, intensive legislative work has commenced with 48 pieces of secondary legislation, including amendments and corrections published until now. For more information, see the chapter by Meinshausen on the impact of Regulation 2018/848 on smallholder farmers, page 122).

In 2024, this rush seemingly slowed, with “only” five new regulations adopted. However, these reflect the Commission’s focus on the topic of imports, as four out of the five address this issue.

The 2018/848 basic act—while maintaining the concept of equivalent third countries (see next section)—envisions a shift in the EU import system from equivalence to compliance. After January 1, 2025, only operators in third countries who directly apply the EU Organic Regulations and are certified by control bodies and authorities approved by the European Commission based on full compliance will be allowed to sell organic products in the EU market. Consequently, the reapproval of all listed control bodies and authorities has been necessary. This challenging process has not yet been fully finalized. However, three updates to the list in Commission Implementing Regulation (EU) 2021/1378 (Regulations 2024/1748, 2024/2140, and 2024/2794) have been issued during the year, with at least one more still anticipated.

Regulation 2024/230, published at the beginning of 2024, introduced new provisions regarding the information to be provided by third countries, control authorities and control bodies for the purpose of supervising their recognition and the measures to be

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⁷ Silvia Schmidt, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio

⁸ Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007; <http://data.europa.eu/eli/reg/2018/848/oj>

⁹ Regulation (EU) 2020/1693 of the European Parliament and of the Council of 11 November 2020 amending Regulation (EU) 2018/848 on organic production and labelling of organic products as regards its date of application and certain other dates referred to in that Regulation (Text with EEA relevance); <http://data.europa.eu/eli/reg/2020/1693/oj>

taken during that supervision. It specifies provisions concerning actions to be taken by the competent authorities following a notification by the Commission of a substantiated suspicion of an irregularity or infringement. The regulation also lays down additional rules on the procedures for supervising recognised third countries and the regular review of the recognition of control bodies and control authorities. Furthermore, it establishes specific provisions for the roles of Member State authorities in assisting the Commission with the review of the recognitions of third countries, control authorities and control bodies.

The only legislative act published in 2024 not related to imports was Regulation 2024/2867, which introduced a new option to display the EU organic logo on product packaging.

International trade

As previously mentioned, the existing concept of equivalency agreements with third countries is intended to be maintained. However, the regulations provide a basis for renegotiating all such agreements to transform them into bilateral trade agreements. The renegotiation process is still ongoing and is expected to continue until 2026. Notably, trade agreements have already been established with Chile, Switzerland, and the United Kingdom; consequently, renegotiation is unnecessary for these three countries.

Negotiation talks are currently underway with other third countries that have organic equivalency agreements with the EU, including Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, South Korea, Tunisia, and the United States. Additionally, negotiations have been initiated with Mexico and Colombia.

Political context: European Green Deal, EU elections, & focus on competitiveness

In response to strong societal and youth demands for climate action, the European Commission published the European Green Deal (EGD) at the end of 2019, aiming to achieve climate neutrality in the EU by 2050.

In the meantime, tractor protests at the beginning of 2024 highlighted significant discontent within the farming community. The main demand was for the ability to earn a decent living and to improve farmers' position in the agri-food supply chain.

Since June 2024, following the EU elections, right-wing and far-right parties have gained greater representation in the current European Parliament compared to the previous 2019–2024 mandate.

In light of the above, EU policymakers in the new post-election mandate aim to ensure that EU agriculture remains sustainable, resilient, and competitive. While there is still a commitment to upholding the European Green Deal, its objectives must be explicitly aligned with safeguarding the EU's competitiveness both globally and within individual sectors.

Strategic dialogue and vision for agriculture and food

In the context of increasing polarisation, challenges, and geopolitical impacts on EU agriculture, Commission President Ursula von der Leyen launched the *Strategic Dialogue on the Future of EU Agriculture* during her State of the Union address in September 2023. The Strategic Dialogue brought together a wide range of stakeholders from across the supply chain—NGOs, farmers, retailers, and trade organisations—with the goal of developing recommendations to address the current challenges facing farmers. The organic sector was represented by Jan Plagge, President of IFOAM Organics Europe.

On 4 September 2024, Commission President von der Leyen presented the resulting report, which was adopted by consensus among all participants in the Dialogue. This report serves as a common framework for action to achieve the EU's environmental goals within the agri-food system. Its recommendations aim to bridge the pursuit of EU environmental and climate objectives with actionable steps and strategies for implementation.

The consensus report underscores broad agreement on the necessity of transitioning to sustainable farming and food systems, emphasising that this transition must be economically viable for farmers. It calls for reconciling environmental sustainability with a fair income for farmers and highlights the need to invest in organic research and innovation. The report's outcomes are expected to inform the *Vision for Agri-Food*, which President von der Leyen has committed to presenting within the first 100 days of her second mandate.

Common Agricultural Policy

The current Common Agricultural Policy (CAP) regulations were officially adopted by the European Parliament during a plenary session on 23 November 2021. These regulations came into effect on 1 January 2023 and will remain in force until 31 December 2027. The updated CAP offers greater flexibility for Member States in achieving its policy objectives by introducing CAP Strategic National Plans, which are designed and implemented at the national level.

The CAP plays a crucial role in supporting the transition to large-scale organic farming within the EU. However, its effectiveness in this area hinges on its ability to provide robust support to organic farmers and to recognise their additional efforts and investments. The new architecture of the CAP, however, appears somewhat insufficient to address the pressing environmental challenges faced by societies.

This architecture relies heavily on "eco-schemes," which account for 25 percent of the budget allocated to the first pillar. While eco-schemes were envisioned as a tool to incentivise environmentally friendly farming practices, they are only mandatory for Member States, remaining voluntary for individual farmers. Moreover, the definitions and criteria for eco-schemes have been delegated to Member States, leading to varying levels of ambition and significant disparities in implementation across different countries.

The remaining components of the CAP's green framework consist of nine "Good Agricultural and Environmental Conditions" (GAECs), which were significantly weakened during the targeted review of May 2024 following the farmers' protests of 2023 and 2024. This review reduced the environmental requirements of the GAECs and shifted more responsibility for their implementation to the Member States.

Additionally, 35 percent of the budget allocated to the second pillar is dedicated to Agri-Environmental and Climate Measures (AECMs), which are voluntary for farmers. While these measures aim to support sustainable farming practices, their optional nature may limit their overall impact on addressing environmental and climate challenges.

A 2022 briefing by IFOAM Organics Europe on the status of CAP National Strategic Plans, along with an analysis conducted under the OrganicTargets4EU project, highlighted that many Member States exhibit insufficient ambition in developing and supporting organic farming.¹ Without significant changes to measures and budgets, these plans are unlikely to achieve the overarching goal of converting 25 percent of European agricultural land to organic farming by 2030.

The early years of implementation appear to confirm this trend, as organic farmers have reported a decline in the comparative advantage of transitioning conventional farms to organic methods. By contrast, incentives for adopting less transformative farming practices, which yield fewer environmental benefits, seem to be more favourable. This disparity raises concerns about the effectiveness of the current CAP framework in driving meaningful progress toward the EU's organic farming targets.

The European Commission's proposal for the CAP post-2027 is expected to be published in the second half of 2025, following the release of the Multiannual Financial Framework (MFF) proposal, which is scheduled for July 2025. Once the CAP proposal is published, official negotiations with the European Parliament and the Council will commence.

Sustainable food systems, sustainable public procurement & green claims

Sustainable Food Systems and Sustainable Public Procurement

The European Commission initially planned to present its Sustainable Food Systems (SFS) law by the end of 2023 as part of the Farm to Fork Strategy. This flagship initiative aimed to define "sustainable food systems" and introduce provisions for sustainable public procurement and labelling. However, the SFS law has been delayed, with no confirmed publication date, reflecting Commissioner Christophe Hansen's focus on implementing existing legislation.

In July 2024, the Commission announced plans to revise the Public Procurement Directive 2014/24 by late 2025. This revision could significantly impact public food procurement, encouraging the inclusion of more organic products in public canteens and advancing sustainable food system goals.

¹ See also chapter by Lampkin et al. about the 25 percent goal in this volume.

The Directive on substantiating green claims and its impact on the agri-food sector

In March 2023, the European Commission proposed a Directive to combat greenwashing by substantiating green claims, a move strongly supported by the organic movement. However, concerns have arisen over the reliance on the Product Environmental Footprint (PEF) methodology, which is inadequate for evaluating complex agri-food systems. It overlooks key factors such as pesticide impacts, biodiversity loss, and animal welfare, often favouring intensive production systems over sustainable practices.

While organic products compliant with Regulation 2018/848 are excluded, the Directive has broader implications, introducing rigorous processes for verifying environmental claims and regulating labelling schemes to ensure credibility. The organic sector supports the Directive's goal but highlights the PEF methodology's unsuitability for agri-food products. Trilogue¹ negotiations are expected in early 2025, with final adoption anticipated by mid-2025.

Climate and nature restoration legislation in the agricultural sector

The impacts of climate change, such as droughts and floods, are harming agricultural production, while agricultural greenhouse gas (GHG) emissions in the EU have remained stagnant. Croplands and grasslands continue to emit GHGs instead of acting as carbon sinks. To address these challenges, the EU revised the LULUCF Regulation and the Effort Sharing Regulation to set stricter targets for emissions reductions and carbon removals, including non-CO₂ emissions from agriculture.

The EU is also advancing legislation for harmonised carbon certification, establishing standards for carbon farming and carbon storage, with implementing acts expected in 2025. While organic farmers already employ carbon-friendly practices, their ability to generate additional carbon credits may be limited. Furthermore, focusing solely on carbon risks neglecting broader biodiversity and ecosystem functions.

The Nature Restoration Law, effective August 2024, includes restoration targets for agricultural ecosystems, such as drained peatlands and cropland soils, as well as measures to restore biodiversity and pollinator populations. Member States must now draft restoration plans, with organic farming highlighted as a key restoration practice.

Tackling soil health at the EU level

Unlike air and water, EU-level soil regulation has been absent, with a 2006 attempt failing due to opposition from some Member States. Meanwhile, soil health has deteriorated, with 70% of EU soils now classified as unhealthy.

In July 2023, the European Commission proposed a Directive for Soil Monitoring and Resilience to establish a harmonised soil monitoring system but stopped short of setting binding targets for soil restoration. Despite its limitations, the directive marks progress

¹ A trilogue is a non-public negotiation process involving representatives from the European Parliament, the Council of the European Union, and the European Commission. Following these discussions, the proposal may proceed to final approval and enter into force.

toward recognising soil health as crucial for sustainable food production and ecosystem services like water purification and carbon sequestration.

Trilogue negotiations on the directive began in October 2024, a critical phase for shaping future EU soil regulation.

New Genomic Techniques (NGTs)

Following the publication of the legislative proposal on New Genomic Techniques (NGTs) in June 2023, the policy process is actively underway as of November 2024. The proposal aims to revise the regulatory framework for Genetically Modified Organisms (GMOs), shifting from the EU's precautionary approach to focus on biosafety, freedom of choice, and consumer information. The draft introduces two categories for NGT crops: Category 1 NGT plants: Subject to less stringent regulations; Category 2 NGT plants: Governed by the existing GMO framework with some exceptions for risk assessment and detection methods.

Both categories, however, remain prohibited in organic farming.

Pressure for a more lenient regulatory framework has been intense. The European Parliament expedited the legislative process, adopting its position in April 2024, which aligns with the Commission's proposal while adding traceability and labelling requirements for Category 1 crops and weakening some biosafety elements.

The European Council, after two failed attempts to reach a general approach in December 2023 and February 2024, has yet to agree on a position. The key obstacle remains concerns over the impact of patents on NGT plants in the European breeding sector. Once the Council reaches consensus, trilogue negotiations will begin.

Research and innovation

Organic farming research has been a recipient of funding through European and national research programmes as well as national organic action plans. Starting from the mid-1990s, there has been a growing trend of funding support for organic research projects specifically dedicated to organic food and farming within the EU framework programs for research and innovation. This funding has contributed significantly to the advancement of knowledge and practices in the field of organic agriculture, promoting sustainability and environmental stewardship in farming methods.

Transnational collaboration

The CORE Organic Cofund funding network¹ was renamed CORE Organic Pleiades Network² in 2022. It consists of 41 partners in 27 countries/regions and is implemented

¹ The CORE Organic Cofund was a funding network that supports research and innovation in the field of organic farming and food systems. It is a collaborative effort among several European countries to jointly fund and coordinate research projects focused on organic agriculture. The name "CORE" stands for "Coordination of European Transnational Research in Organic Food and Farming Systems."

² Information about the Pleiades project can be found at <https://projects.au.dk/coreorganicpleiades>

under the Horizon Europe project OrganicTargets4EU coordinated by IFOAM Organics Europe. It announced its first call for projects in the autumn of 2023.

Collaboration with the European Technology Platform for Research & Innovation in Organics and Agroecology (TP Organics)¹, as well as other key stakeholders in the sector, has played a crucial role in ensuring that the perspectives and concerns of transnational organizations representing farmers, industry, and civil society are effectively considered and integrated into relevant initiatives and policies.

The online platforms Organic Eprints (www.orgprints.org) and Organic Farm Knowledge (organic-farmknowledge.org) continue to play a crucial role in disseminating research findings to diverse target audiences across Europe. These platforms serve as valuable repositories for knowledge sharing, bridging the gap between researchers, practitioners, policymakers, and other stakeholders in the organic sector.

Science Day and Organic Innovation Days 2024

Under the title “Next steps to sustainable food systems”, TP Organics started discussing its new Strategic Research & Innovation Agenda (SRIA) for Organics and Agroecology at the annual Science Day taking place at Biofach, the world’s leading trade fair for organic food, together with the participants. A detailed review of the session is accessible on the TP Organics website.²

On 22-23 October 2024, the Organic Innovation Days, TP Organics’ annual public event and the only EU event dedicated to organic and agroecological research and innovation, took place in the “Organic House” in Brussels. The 2024 edition’s theme, “Preparing for the next programme: Getting organic research & innovation ready for the next political mandate”, focused on the last part of Horizon Europe (Work Programme 2026-2027) as well as the next EU R&I framework programme (FP10). The event was jointly organised with CORE Organic, the transnational network funding organic research which celebrated 20 years of international collaboration in 2024. A comprehensive review of this event is accessible on the TP Organics website.³

Horizon Europe

Horizon Europe⁴ is the EU’s current main funding programme for research and innovation, with a budget of 95.5 billion euros for 2021 to 2027. Cluster 6 of Horizon Europe, “Food, Bioeconomy, Natural Resources, Agriculture and Environment”,⁵ with a total budget of 8.952 billion euros, aims at reducing environmental degradation, halting and reversing the decline of biodiversity on land, inland waters and sea; and

¹TP Organics website: <https://tporganics.eu>

² Review of Science Day 2024 on the TP Organics website: <https://tporganics.eu/science-day-2024-review/>

³ Review of the 2023 Organic Innovation Days: <https://tporganics.eu/organic-innovation-days/>

⁴ Horizon Europe website: https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/horizon-europe_en

⁵ Cluster 6 of Horizon Europe, “Food, Bioeconomy, Natural Resources, Agriculture and Environment”: https://ec.europa.eu/info/research-and-innovation/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/cluster-6-food-bioeconomy-natural-resources-agriculture-and-environment_en

better managing natural resources through transformative changes to the economy and society in urban and rural areas.

Three organic-specific projects are funded under the first Work Programme (2021–2022).¹² The second Work Programme (2023–2024) included seven calls specifically tailored to the organic sector.³ These dedicated calls are in alignment with the European action plan for organic food and farming.⁴ The plan emphasises a commitment to allocate a minimum of 30 percent of the research and innovation budget designated for agriculture, forestry, and rural areas to topics that are either directly pertinent to the organic sector or hold relevance for it.

Horizon Europe introduces a set of innovative instruments known as the EU Missions. Among these missions, "A Soil Deal for Europe" has a compelling vision to create 100 living labs and lighthouses that will spearhead the shift toward healthier soils by the year 2030. TP Organics has been actively contributing to this mission, and their efforts have been noteworthy. Moreover, TP Organics commissioned a ground-breaking study focused on organic living labs and lighthouse farms across Europe.⁵ These initiatives underscore the organic sector's capacity for innovation, illustrating its dedication to enhancing organic practices and serving as an inspirational force for the broader transformation of the agri-food system.

Furthermore, TP Organics (with IFOAM Organics Europe as official partner) plays a pivotal role in the new European Research and Innovation (R&I) Partnership focused on agroecology living labs and research infrastructures.⁶ TP Organics specifically contributes to Work Package 2, which centres on fostering science-policy dialogue.

Additionally, TP Organics holds an Advisory Board membership in the FOODPathS project, which is actively preparing the "FutureFoodS" Partnership for Sustainable Food Systems⁷ and was appointed Member of the Scientific and Stakeholder Advisory Board

¹ Horizon Europe Work Programme 2023-2024: https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/horizon-europe-work-programmes_en

² The following projects are funded under the second work programme. In addition, several other projects, such as ..., are relevant for the organic sector.

³ The organic-specific calls are: Selective breeding programme for organic aquaculture - Improving yields in organic cropping systems - Increasing the availability and use of non-contentious inputs in organic farming - Sustainable organic food innovation labs - Pilot network of climate-positive organic farms - Developing an EU advisory network on organic agriculture - Organic farming thematic networks to compile and share knowledge ready for practice.

⁴ Organic Action Plan for the European Union: https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan_en

⁵ TP Organics (2022): Organic Living Labs and Lighthouse Farm in Europe. TP Organics Brussels. Available at https://tporganics.eu/wp-content/uploads/2022/10/TPO_Study_Organic_Living_Labs_2022.pdf

⁶ European research and innovation (R&I) partnership on agroecology living labs and research infrastructures: https://research-and-innovation.ec.europa.eu/research-area/agriculture-forestry-and-rural-areas/ecological-approaches-and-organic-farming/partnership-agroecology_en

⁷ FOODPathS: <https://www.foodpaths.eu/>

European R&I Partnership for Sustainable Food Systems: <https://scar-europe.org/index.php/food-main-actions/food-systems-partnership>

of FutureFoods, for which funding is provided jointly by the European Commission and Member States. The partnership launched its first joint transnational call in November 2024.¹

European Organic Congress 2024: building bridges for a sustainable future

The 2024 European Organic Congress, held from 10–12 September in Budapest, Hungary, was a key event for the organic movement. Organised by IFOAM Organics Europe, ÖMKi, and the Hungarian Ministry of Agriculture, it took place under Hungary's Presidency of the Council of the EU.

Convened shortly after the European elections, the Congress provided a platform for dialogue among EU representatives, national ministries, and policy experts. Hungarian Minister of Agriculture, Dr. István Nagy, delivered a keynote on organic agriculture's role in sustainable farming and addressing global challenges. Discussions covered the post-election EU landscape, CAP reform to support sustainability, organic public procurement, and challenges from new genomic techniques, alongside the economic potential of organic farming and the importance of research and innovation in transforming food systems.

As a landmark gathering for the organic community, the European Organic Congress once again highlighted its central role in shaping a more sustainable future for Europe's food and agriculture systems.

Outlook

2025 will be a pivotal year for advancing the EU's agricultural, organic and research policies. With critical regulations like the import compliance framework coming into force and the multi-annual financial framework post-2027 proposal (including the next CAP and the next EU research & innovation framework programme FP10) on the horizon, policymakers face a balancing act of promoting sustainability, competitiveness, and fairness across the sector. Organic farming remains central to these efforts, with its potential amplified by supportive legislative, trade, and research developments.

¹ FutureFoodS Partnership's first transnational co-funded call: "Transforming Food Systems - reshaping food system interactions, fostering food innovations and empowering sustainable food choices": <https://www.futurefoodpartnership.eu/funding-opportunities>

Europe and the European Union: Key indicators 2023

Indicator	Europe	European Union ¹	Top 3 countries in Europe
Organic farmland	19.5 million hectares (ha)	17.7 million ha	Spain (3.0 million ha); France (2.8 million ha); Italy (2.5 million ha)
Organic share of total farmland	3.9 %	10.9 %	Liechtenstein (44.6%); Austria (27.3%); Estonia (22.9%)
Increase in organic farmland 2022-2023	0.77 million ha	0.62 million ha	Spain (+0.32 million ha); Ukraine (+0.21 million ha); Italy (+0.10 million ha)
%-Increase in organic farmland	4.1%	3.6%	Ireland (+86.7%); Ukraine (+78.7%); Moldova (+45.0%)
Land use	Arable crops: 8.4 million ha; Permanent crops: 2.5 million ha; Permanent grassland: 7.8 million ha	Arable crops: 7.7 million ha Permanent crops 2.3 million ha Permanent grassland: 7.4 million ha	
Top arable crop groups	Cereals: 2.8 million ha Green fodder: 2.6 million ha Oilseeds: 0.6 million ha	Cereals: 2.5 million ha Green fodder: 2.4 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.5 million ha); Italy (1.2 million ha); Germany (0.9 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.5 million ha Nuts: 0.5 million ha	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.4 million ha	Largest permanent crop areas: Spain (0.9 million ha); Italy (0.6 million ha); France (0.2 million ha)
Wild collection area	10.6 million ha	7.1 million ha	Finland (6.9 million ha); Russian Federation (0.8 million ha); Serbia (0.6 million ha)
Producers	494'624	434'577	Italy (84'191); France (61'167); Greece (58'691)
Processors	94'627	89'379	Italy (24'800); Germany (22'382); France (20'141)
Importers	7'955	6'727	Germany (1'971); France (722); Switzerland (717)
Retail sales	54.7 billion euros	46.5 billion euros	Germany (16.1 billion euros); France (12.1 billion euros); Switzerland (4.2 billion euros)
Development of retail sales 2022-2023	+3.0%	+2.9%	Estonia (13.0 %); Netherlands (12.5 %); Belgium (9.0 %)
Organic share of the total market	No data	No data	Denmark (11.8 %); Switzerland (11.6 %); Austria (11.0 %)
Per capita consumption	66 euros	104 euros	Switzerland (468 euros); Denmark (362 euros); Austria (292 euros)
EU organic imports		2.48 million metric tons (MT)	Netherlands (0.80 million MT); Germany (0.42 million MT); France (0.27 million MT)
Exports to EU		Bananas (0.70 million MT) Oilcake (0.18 million MT) Soybeans (0.16 million MT)	Ecuador (0.36 million MT); China (0.20 million MT); Dom. Rep. (0.19 million MT);

Source: FiBL-AMI survey 2025. For detailed data sources, see annex, page 333.

¹ Please note that the 2023 data for the European cover the 27 countries that were members of the European Union in 2023.

Europe and European Union: Key facts and Figures

HELGA WILLER¹, BERNHARD SCHLATTER², JAN TRÁVNÍČEK³, AND DIANA SCHAACK⁴

In 2023, the development of the organic sector in Europe exhibited various trends in key indicators. While organic farmland, the number of producers and retail sales increased, EU organic imports declined.

Both the organic farmland and the market will need to grow at a faster rate to achieve the 25 percent organic area share goal by 2030, as outlined by the European Commission (2020) in its Farm to Fork strategy for the European Union. (For more information, see chapter by Lampkin et al. on page 213).

I Key facts and figures: Production and market highlights

More than 19.5 million hectares of farmland were organic in Europe in 2023 – Spain had the largest area

In Europe, 19.5 million hectares were managed organically in 2023, with the EU accounting for 17.7 million hectares. Spain surpassed France to become the leading country in terms of farmland under organic management, with 15.4 percent of Europe's organic farmland, followed by France, Italy, and Germany. These four countries collectively accounted for more than half of the European organic farmland and almost 57 percent of the EU's organic farmland.

European organic farmland increased by almost 0.8 million hectares

Organic farmland increased by 0.8 million hectares in Europe, with a growth rate of 4.1 percent. In the EU, organic farmland grew by 0.6 million hectares, representing a growth rate of 3.6 percent. However, there were significant decreases in France and Russia, with France losing 200'000 hectares. To achieve the EU's goal of having 25 percent organic farmland by 2030, an annual growth rate of 10 percent is required.

Liechtenstein continued to be the country with the highest organic area share in the world

Organic farmland in Europe accounted for 3.9 percent of the total agricultural land, while in the European Union, it constituted 10.9 percent. Liechtenstein maintained its position as the country with the highest organic farmland share globally at 44.6 percent, followed by Austria (27.3 percent), Estonia (22.9 percent), and Portugal (21.7 percent), with Portugal entering the top four for the first time.

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² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

⁴ Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de

In Europe, almost half of the organic farmland was used for arable crops, strong growth of oilseeds

Arable land accounted for 43 percent of organic farmland in Europe, followed by permanent grassland at 40 percent and permanent crops at 13 percent. Cereals remained the most prominent arable crop, covering 2.8 million hectares in Europe (EU: 2.5 million hectares). Among permanent crops, olives occupied 0.65 million hectares. Oilseeds showed the most significant growth over the past decade, with a 151 percent increase in Europe and 173 percent in the EU. However, changes in Eurostat's reporting system have made it difficult to accurately track the total organic area for crops, as in-conversion areas are no longer included.

More than 490'000 organic producers and almost 95'000 organic processors

There were 494'624 organic producers in Europe in 2023, with 434'577 located in the EU. Italy had the largest number of producers (almost 85'000). The number of producers grew by 1.4 percent in Europe and 1.8 percent in the EU. There were 94'627 organic processors in Europe, representing a 1.5 percent increase compared to 2022, with 89'379 in the EU. Italy again led with the most processors (24'800). The number of importers in Europe grew to 7'955, marking a 3.8 percent increase, while the EU recorded 6'727 importers, up by 3.4 percent. Germany had the highest number of importers (1'974).

Organic imports: Ecuador continued to be the largest supplier, and tropical fruit remained the most important commodity group

In 2023, the EU imported 2.47 million metric tons of organic products, marking a decline of 9.1 percent compared to 2022. Ecuador was the largest supplier, providing 0.36 million metric tons of organic products. Tropical fruits, mainly bananas, remained the most significant import category, accounting for 0.77 million metric tons, or nearly one-third of all imports. The Netherlands was the largest importer in the EU, acting as a re-exporter for other European countries.

Retail sales exceeded 54 billion euros in Europe

Organic retail sales in Europe reached 54.7 billion euros in 2023, with 46.5 billion euros in the EU. Germany remained the largest market in Europe, with sales of 16.1 billion euros, followed by France with 12.1 billion euros. Retail sales grew by 3.0 percent in Europe and 2.9 percent in the EU. From 2014 to 2023, the values of organic retail sales in Europe and the EU more than doubled.

The highest organic market shares and per capita consumption are found in Europe

European countries continued to lead globally in organic food sales as percentages of their food markets. Denmark had the highest market share globally (11.8 percent), followed by Switzerland (11.6 percent) and Austria (11.0 percent). In 2023, European consumers spent an average of 66 euros per capita on organic food (EU: 104 euros). Swiss and Danish consumers topped the list, spending 468 euros and 362 euros per capita, respectively.

For detailed data on organic farming and market development in Europe and the European Union, please refer to the tables provided in the Annex, section 2.3 Organic Agriculture in Europe and the European Union: Tables, page 315.

Note on data collection and countries covered

Like in the rest of the world, data collection in Europe is carried out using multiple information sources. However, we would like to point out that Eurostat, the European Union's statistical office, is constantly expanding its data collection effort in the field of organic agriculture, and most of the data on organic areas, livestock, and operators was taken from Eurostat.

This article focusses on organic farming and market statistics in Europe and includes:

- › The 27 Member States of the European Union, which consist of the EU-13 countries that became members of the European Union in or after May 2004, and the EU-14 countries, who were member countries of the European Union before the accession of ten candidate countries on May 1, 2004.
- › The EU Candidate and Potential Candidate countries (CPC): Albania, Bosnia-Herzegovina, Kosovo, North Macedonia; Montenegro, Serbia, Turkey,
- › The members of the European Free Trade Association (EFTA): Iceland, Norway, Liechtenstein, Switzerland,
- › Other European countries: Andorra, Belarus, Moldova, Russian Federation, San Marino, Ukraine and the United Kingdom.

2. Organic agricultural land: Area, organic share of total, growth

In this section, we summarize the area-related data for Europe and the European Union. Graphs and summary tables can be found on the following pages, and tables with country details are available in the annex (page 315).

Organic agricultural land

- In 2023, 19.5 million hectares were farmed organically in Europe and 17.7 million hectares in the European Union (EU).
- The countries with the largest organic farmland areas were Spain (accounting for 15.4 percent of Europe's organic farmland and taking the number one position from the previous leader, France), followed by France, Italy, and Germany. These four countries collectively accounted for more than half of Europe's organic farmland and almost 60 percent of the EU's organic farmland.
- Europe held almost one-fifth of the world's organic farmland, representing 19.7 percent of the global total.

Organic shares of total agricultural land

- In Europe, 3.9 percent of agricultural land was organic in 2023, while in the EU, it reached 10.9 percent.
- In 16 countries (14 in the EU), 10 percent or more of agricultural land was managed organically.
- The countries with the highest organic area shares were Liechtenstein (44.6 percent), Austria (27.3 percent), Estonia (22.9 percent), and Portugal (21.7 percent), the latter making it to the top four for the first time. Liechtenstein continued to have the highest organic farmland share in the world.
- **Growth of organic agricultural land**
- In 2023, the organic agricultural land in Europe increased by 0.8 million hectares (EU: 0.6 million hectares), representing a growth rate of 4.1 percent (EU: 3.6 percent).
- The countries that contributed the most to this growth were Spain, Ukraine, Portugal and Italy, collectively adding more than 700'000 hectares. Conversely, there was a significant decrease in France and Russia, with a reduction of 200'000 hectares.
- The highest relative increases were observed in Ireland, Ukraine and Moldova, while the highest relative decreases occurred in Russia (-48.8 percent) and Kosovo (-25.4 percent).

Conversion status of organic farmland

- In Europe, of the 19.5 million hectares of organic agricultural land, at least 13.1 million hectares were fully converted (11.8 million out of 17.7 million hectares were fully converted in the EU).

Table 21: Europe: Organic agricultural land in Europe and the European Union 2023

	Organic area [million ha]	Organic share [%]	Change 2022-2023 [%]	Change 2022-2023 [million ha]	Change 2014-2023 [%]	Change 2014-2023 [million ha]
European Union	17.7	10.9%	3.6%	+0.6	79.9%	7.9
Europe	19.5	3.9%	4.1%	+0.8	65.5%	7.7

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources

Europe: Organic agricultural land by country 2023

Source: FiBL-AMI survey 2025

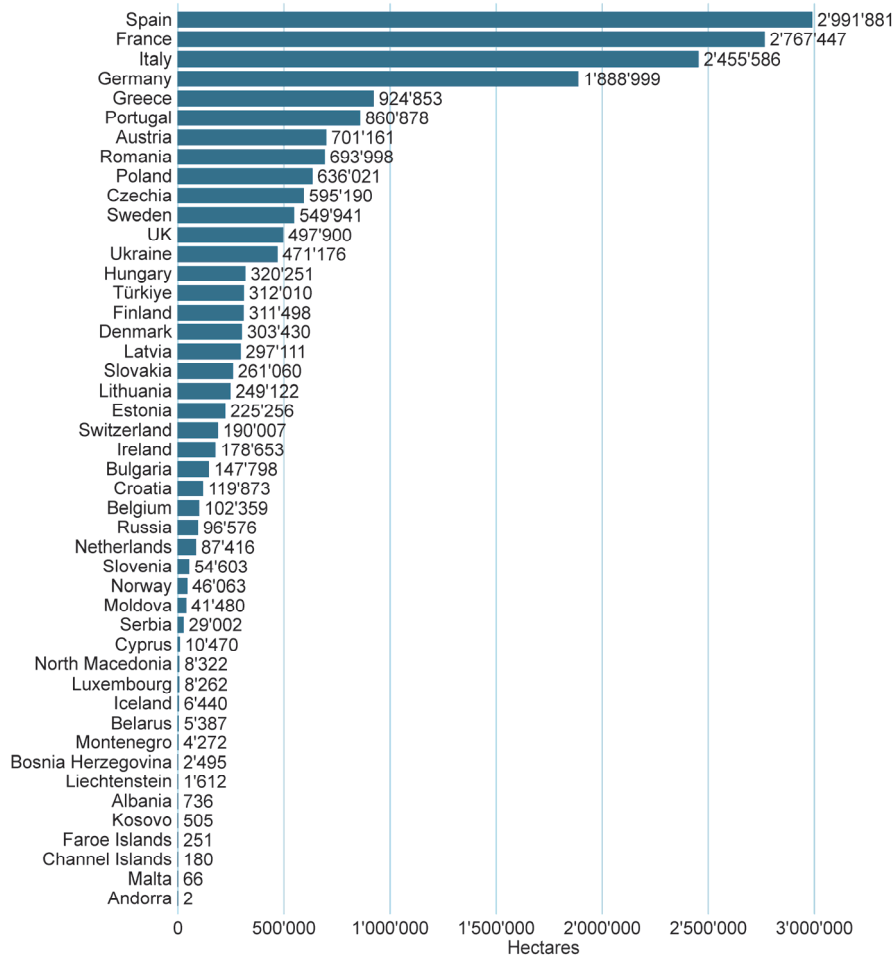


Figure 71: Europe: Organic agricultural land by country 2023

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources.
For detailed data sources. For detailed data sources, see annex, page 333.

Europe: Organic shares of total agricultural land 2023

Source: FiBL-AMI survey 2025

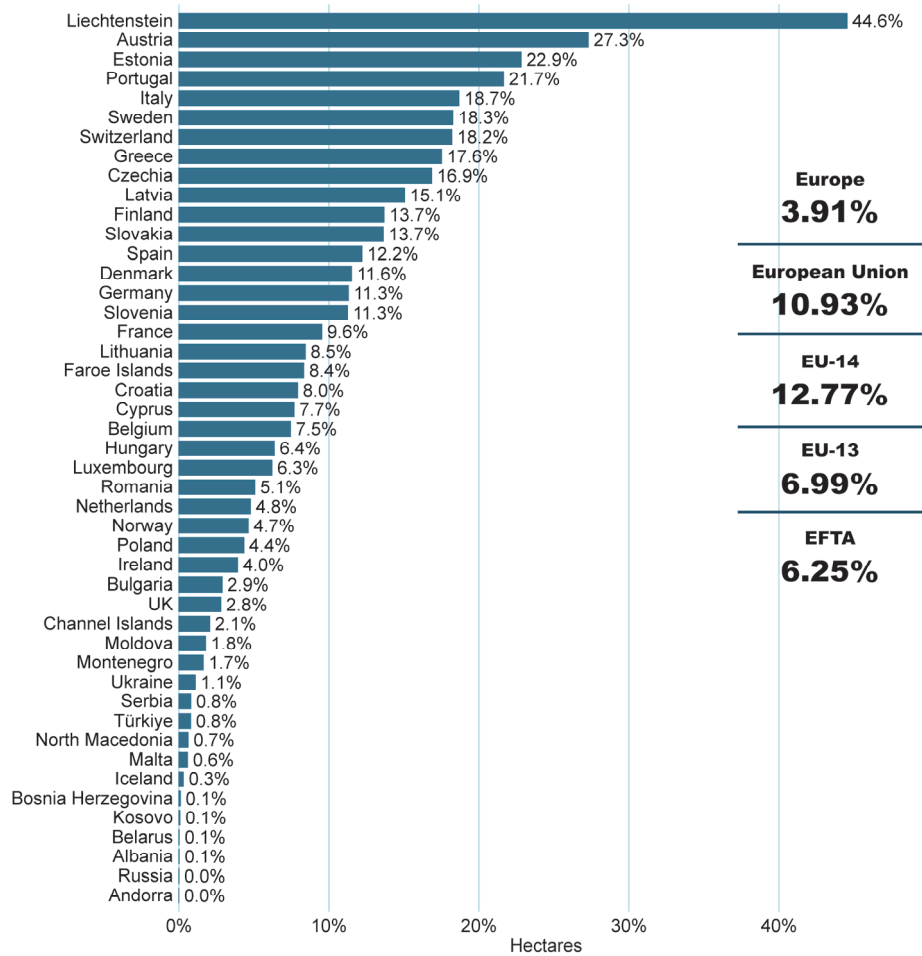


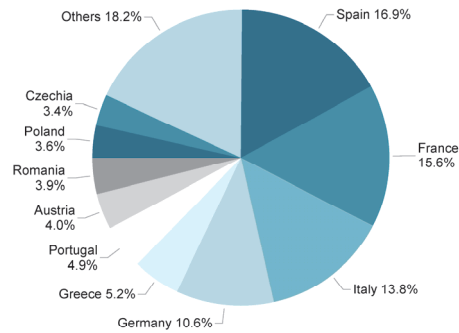
Figure 72: Europe: Organic shares of total agricultural land 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. For detailed data sources, see annex, page 333.

The European Union has 27 Member States. It consists of the EU-13 countries, which became members of the European Union in or after May 2004, and the EU-14 countries, which were members of the European Union prior to the accession of ten candidate countries on May 1, 2004. EFTA refers to the European Free Trade Association, which includes Iceland, Norway, Liechtenstein, and Switzerland.

European Union: Distribution of organic farmland by country 2023

Source: FiBL-AMI survey 2025



Europe: Distribution of organic farmland by country 2023

Source: FiBL-AMI survey 2025

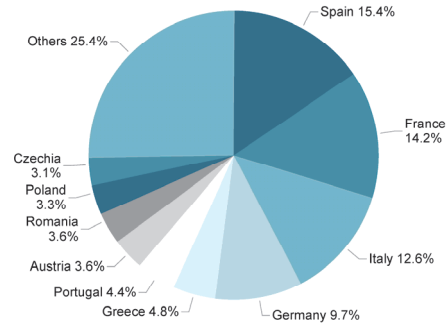


Figure 73: Europe and European Union: Distribution of organic farmland by country 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat
For detailed data sources, see annex, page 333.

Europe and the European Union: Development of organic agricultural land 2000 - 2023

Source: FiBL-AMI surveys 2001-2025, based on the national data sources and Eurostat

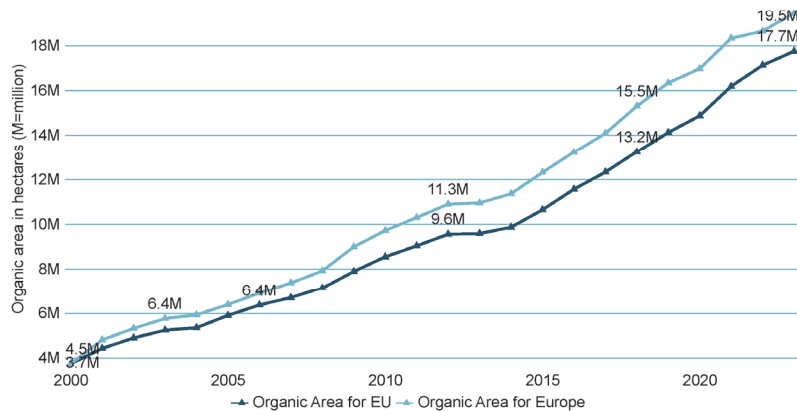


Figure 74: Europe and the European Union: Development of organic agricultural land 2000-2023

Source: FiBL-AMI Surveys 2006-2025 based on national data sources and Eurostat. The data for the European Union covers those countries that were members of the European Union in 2023

Europe: Growth rates for organic agricultural land in Europe and the European Union 2000 - 2023

Source: FiBL-AMI surveys 2001-2025, based on national data sources and Eurostat

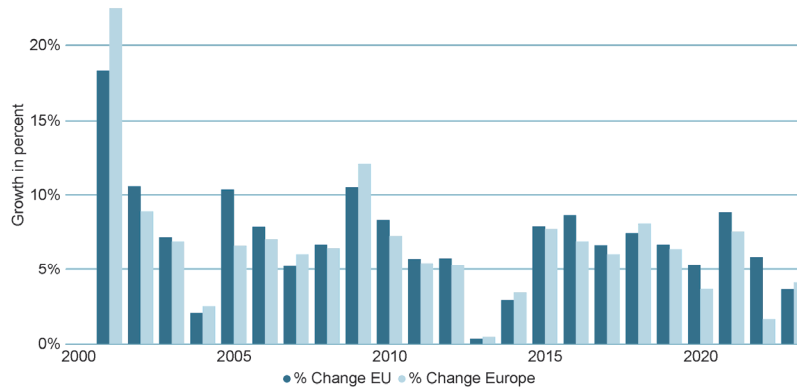
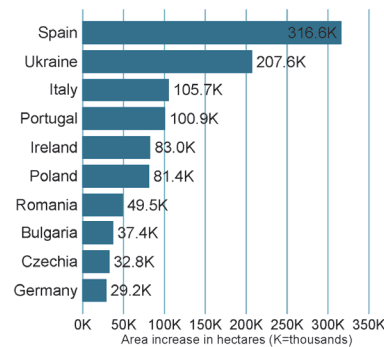


Figure 75: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2023

Source: FiBL-AMI Surveys 2002-2025 based on national data sources and Eurostat

Europe: The ten countries with the highest growth in organic agricultural land in hectares 2023

Source: FiBL-AMI survey 2025, based on Eurostat and national data sources



Europe: The ten countries with the highest growth in organic agricultural land in percentage 2023

Source: FiBL-AMI survey 2025, based on Eurostat and national data sources

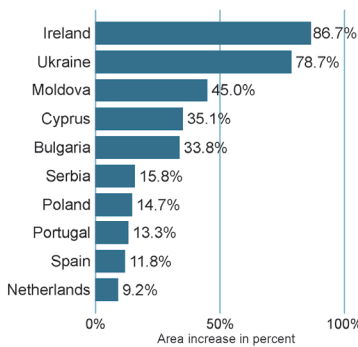


Figure 76: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat
For detailed data sources, see annex, page 333.

3 Land use and crops grown in organic agriculture

Land use¹

For all countries in Europe, information on land use and crop details is available. The area dedicated to all land use types has shown growth in most countries since 2000. In 2022, there was a decrease in organic arable land in Europe (mainly due to losses in Russia and Ukraine), while in 2023 stagnation was noted. The stagnation in 2023 can partly be attributed to the lack of updated data on land use and crops for all European countries in 2023. Additionally, Eurostat, the main source for land use and crop data, changed its reporting system, which no longer includes the in-conversion area for crops. See the box below.

Box 1: Explanation of data discrepancies in European organic crop area reporting

From 2021 onwards, Eurostat, the statistical office of the European Union, revised its reporting methodology for organic farming data.² Up until 2020, Eurostat provided data on the total organic area, the fully converted organic area and the area in conversion for all crop groups and individual crop types. However, starting in 2021, Eurostat only reported the fully converted organic area, leaving a gap in the availability of data on areas in conversion. As a result, the total organic area for crops, such as cereals, vegetables, oilseeds, and others, was not available any longer at the European or Member State level. To address this gap, in 2021 and 2022, FiBL attempted to estimate the missing data using available sources and historical trends. However, this proved to be both time-consuming and prone to inaccuracies. Consequently, in 2023, we decided to report only the fully converted organic areas as provided by Eurostat. This methodological adjustment has led to a significant apparent decrease in organic crop areas, as areas in conversion are no longer included.

It is important to note that some countries, such as Spain, continue to report both fully converted and in-conversion areas through their respective ministries, which allows for a more complete dataset in these cases. Other countries, including Germany and Austria, historically did not differentiate between these two categories, maintaining continuity in their data.

¹ The main land use types are:

- › Arable land crops (mainly cereals, fresh vegetables, green fodder and dry pulses and oilseeds)
- › Permanent grassland (pastures and meadows), and
- › Permanent crops (fruit trees and berries, olive groves and vineyards).

² The Eurostat data collection covers the member states of the European Union, the EU's candidate countries as well as the countries of the European Trade Association EFTA.

Table 22: Europe and the European Union: Land use 2023

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2022-2023 Europe/EU [%]	Change 2014-2023 Europe/EU [%]
Arable land	8.4 (3.8%)	7.7 (7.7%)	-0.1%/+0.1%	+57.7%/+80.3%
Permanent grassland	7.8 (4.5%)	7.4 (14.5%)	+4.4%/+5.1%	+59.4%/+69.5%
Permanent crops	2.5 (14.1%)	2.3 (18.8%)	+4.6%/+6.0%	+80.9%/+83.9%
Total	19.5 (3.9%)	17.7 (10.9%)	4.1%/+3.6%	+65.5%/+79.9%

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat.

Note: Total includes other agricultural land and correction values for double-cropped areas.

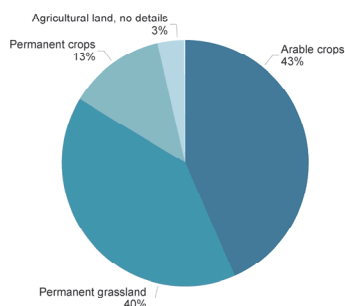
Organic agricultural land by land use type

- **Arable land** constitutes a large part of organic farmland, with 8.4 million hectares in Europe and 7.7 million hectares in the EU. Less arable land was reported; partly due to changes in the Eurostat reporting system (see Box 1, page 183).
- **Permanent grassland** accounted for 7.8 million hectares in Europe and 7.4 million hectares in the EU.
- **Permanent crops** constituted 14.1 percent of the total permanent cropland in Europe and 18.8 percent in the European Union, with 2.5 and 2.3 million hectares, respectively.
- For more information including breakdown by country, see Table 22, Figure 78, Figure 79, Figure 80.

Europe and European Union: Use of organic agricultural land 2023

Source: FiBL-AMI survey 2025

Europe



European Union

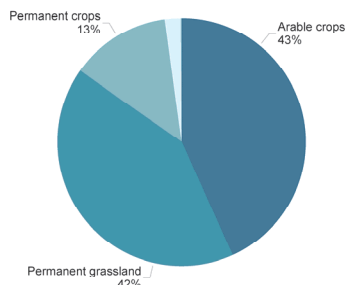


Figure 77: Europe and European Union: Distribution of land use in organic agriculture 2023

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources

Europe: Land use in organic agriculture by top ten countries 2023

Source: FiBL-AMI survey 2025

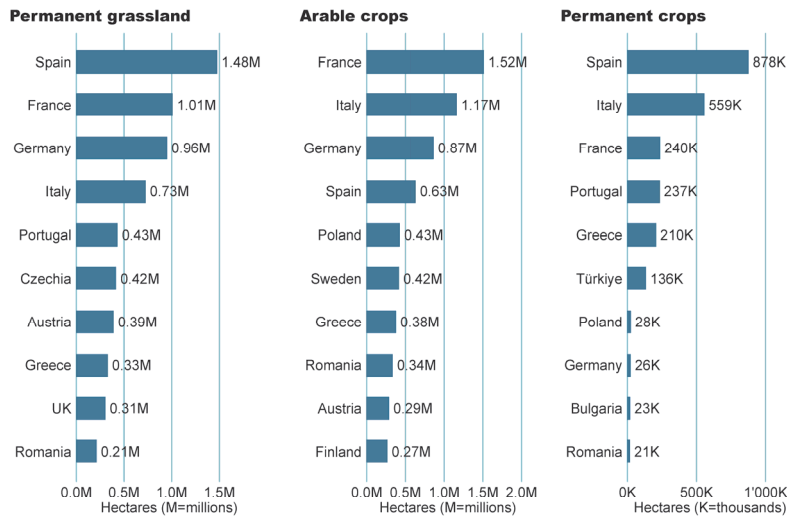


Figure 78: Europe: Land use in organic agriculture - top 10 countries 2023

Source: FiBL-AMI survey 2023 based on Eurostat and national data sources

Europe: Growth in organic agricultural land by land use type 2000 - 2023

Source: FiBL-AMI survey 2025

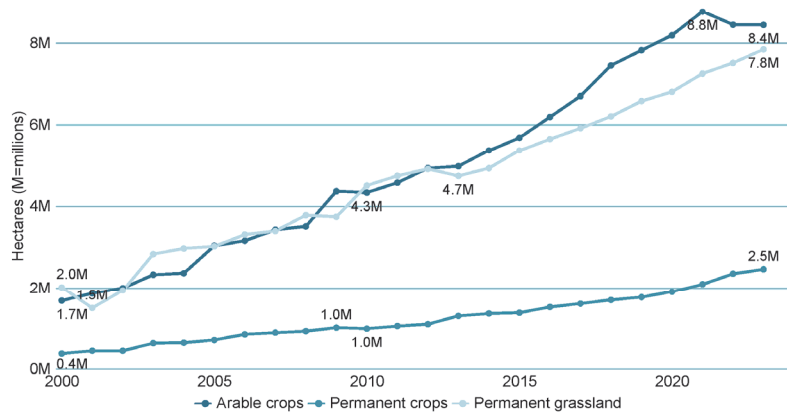


Figure 79: Europe: Growth in organic agricultural land by land use type 2000-2023

Source: FiBL-AMI Surveys 2006-2025 based on national data sources and Eurostat

European Union: Growth in organic agricultural land by land use type 2000 - 2023

Source: FiBL-AMI survey 2025

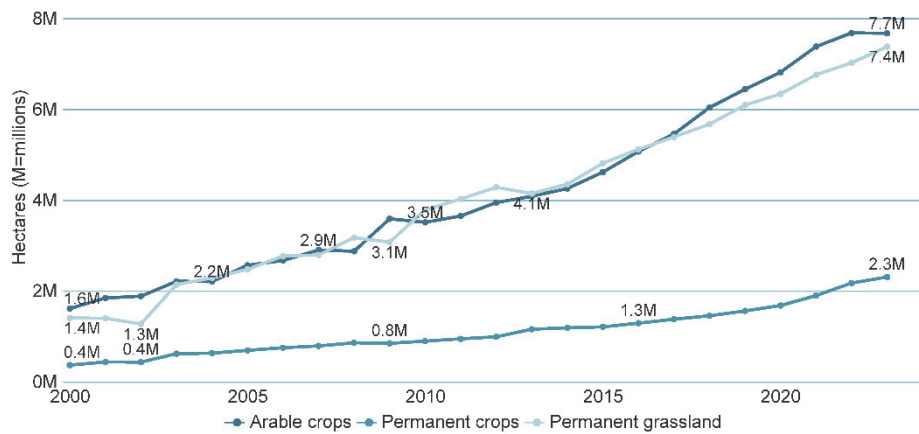


Figure 80: European Union: Growth in organic agricultural land by land use type 2000-2023

Source: FiBL-AMI Surveys 2006-2025 based on national data sources and Eurostat

Crops grown in organic agriculture

In 2023, for many key crops, a smaller area was reported compared to previous years. As explained in Box 1 (page 183), reporting from Eurostat now excludes in-conversion areas for crops. Consequently, most crops show a decrease in reported areas.

Exceptions include dry pulses, which showed growth despite the different reporting method, as well as vegetables (Table 23). The primary arable crop group was cereals, covering 2.8 million hectares in Europe (EU: 2.5 million hectares). Meanwhile, the permanent crop with the largest organic area was olives, occupying 0.65 million hectares. The most significant growth in the ten year period from 2014 to 2023 was observed in oilseeds, with a 173 percent increase in the EU and 151 percent in Europe. The highest area share, exceeding 25.2 percent in the EU, was attributed to dry pulses (Table 23).

Table 23: Europe and the European Union: Key crops/crop group 2023

Crop group		Area (ha)		Organic share (%)		Change 2022-2023 (%)		Change 2014-2023 (%)	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'806'551	2'459'130	2.2	4.7	-3.9	-5.7	47.2	66.4
	Dry pulses	549'629	524'158	9.0	25.2	4.4	4.9	71.6	92.3
	Fresh vegetables	233'459	208'555	5.7	10.4	1.3	-2.6	100.0	114.1
	Green fodder	2'595'292	2'423'763	11.7	11.9	-5.7	-6.8	26.8	39.4
	Oilseeds	618'430	461'204	1.6	4.2	-11.3	-6.2	151.8	173.6
	Root crops	56'785	51'858	0.7	1.7	-6.5	-11.6	37.2	76.6
Permanent crops	Berries*	39'408	36'231	12.5	24.2	-5.3	-5.3	23.4	25.6
	Citrus fruit	56'431	55'814	8.1	10.7	-7.8	-7.8	44.2	44.4
	Fruit, temperate	134'345	117'965	4.9	9.8	-10.6	-10.5	6.1	11.7
	Fruit, (sub)tropical	41'571	23'658	16.0	14.1	-9.8	-7.1	31.5	180.1
	Grapes	456'958	446'395	11.9	14.1	-6.9	-6.7	71.6	77.5
	Nuts*	455'786	416'893	15.9	30.3	-0.2	1.6	151.5	169.7
	Olives	647'880	601'210	10.7	11.8	-1.4	0.1	31.7	44.5

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. Totals for arable and permanent crops in other tables include further crop groups

Note: For crop details by country, please check the crop tables in this book (page 291) and statistics.fibl.org. * For berries and nuts the total areas provided by Eurostat or FAO are not directly comparable with the organic areas.

3.3 Further organic areas

In addition to the agricultural land, there are further organic areas. Large parts of these are wild collection areas constituting 10.6 million hectares (European Union: 7.1 million hectares). The largest wild collection area in Europe (and in the world) was in Finland with 6.9 million hectares (mainly berries). For country details on wild collection areas, see Table 75, page 319.

4 Producers, processors, importers and exporters

While data on organic producers are available for almost all countries, this is not the case for processors and importers and even less for exporters. Although data availability is improving, it is still not possible to draw a clear picture of the latter group over the years.

Table 24: Europe and European Union: Organic operators 2023

	Europe			European Union		
	No.	Change 1 year	Change 10 years	No.	Change 1 year	Change 10 years
Producers	494'624	1.4%	46.6%	434'577	1.8%	71.9%
Processors	94'627	1.5%	82.2%	89'379	2.2%	86.6%
Importers	7'955	3.8%	137.7%	6'727	3.4%	119.5%
Exporters	5'524	10.5%	N/A	4'898	14.0%	N/A

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. For a breakdown by country, see. annex.

Organic producers

- In 2023, there were almost half a million organic producers in Europe, with more than 430'000 in the EU. The country with the largest number of producers was Italy, with almost 85'000.
- Modest growth was observed in the EU (+1.8 percent) and Europe as a whole (+1.4 percent). The number of producers grew at a slower pace than organic farmland. Over the decade from 2014 to 2023, the number of producers in Europe increased by 47 percent (EU: 72 percent). Slightly more than 10 percent of the world's organic farmers are located in Europe.

Organic processors and importers

- In 2023, there were about 95'000 organic processors in Europe, representing a 1.5 percent increase compared to the previous year and an 82 percent increase over the last decade. In the European Union, the number of processors was around 89,000, with a 2.2 percent increase over one year and an 87 percent growth over ten years. Italy continued to have the largest number of processors (24'800).
- The number of importers in Europe increased to about 8,000 in 2023, marking a 3.8 percent rise compared to 2022 and a significant 138 percent increase over the past decade. In the European Union, there were approximately 6,700 importers, up 3.4 percent from the previous year and 120 percent over ten years. Germany had the highest number of importers, totalling 1'974.

For more information see Table 24, Figure 82, Figure 83.

Europe and the European Union: Development of the number of organic producers 2000 - 2023

Source: FiBL survey 2025

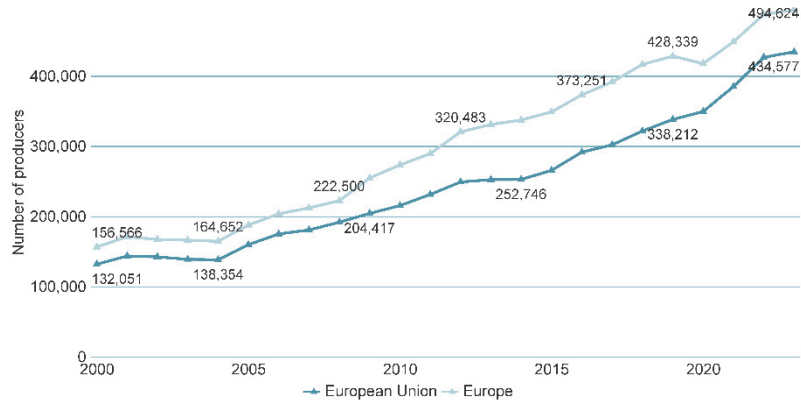
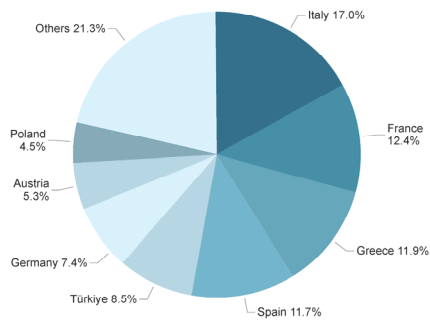


Figure 81: Europe and the European Union: Development of the number of organic producers 2000-2023

Source: FiBL-AMI surveys 2002-2023 based on national data sources and Eurostat

Europe: Distribution of organic producers 2023

Source: FiBL-AMI survey 2025



Europe: Distribution of organic processors 2023

Source: FiBL-AMI survey 2025

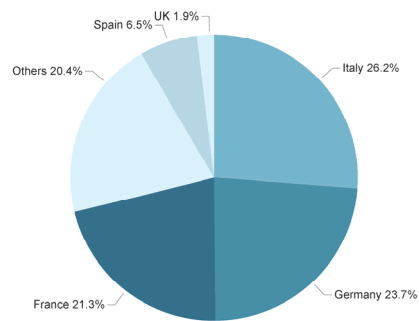


Figure 82: Europe: Distribution of organic producers and processors by country 2023

Source: FiBL-AMI survey 2025, based on national data sources and Eurostat

Europe: Organic producers by country 2023

Source: FiBL survey 2025

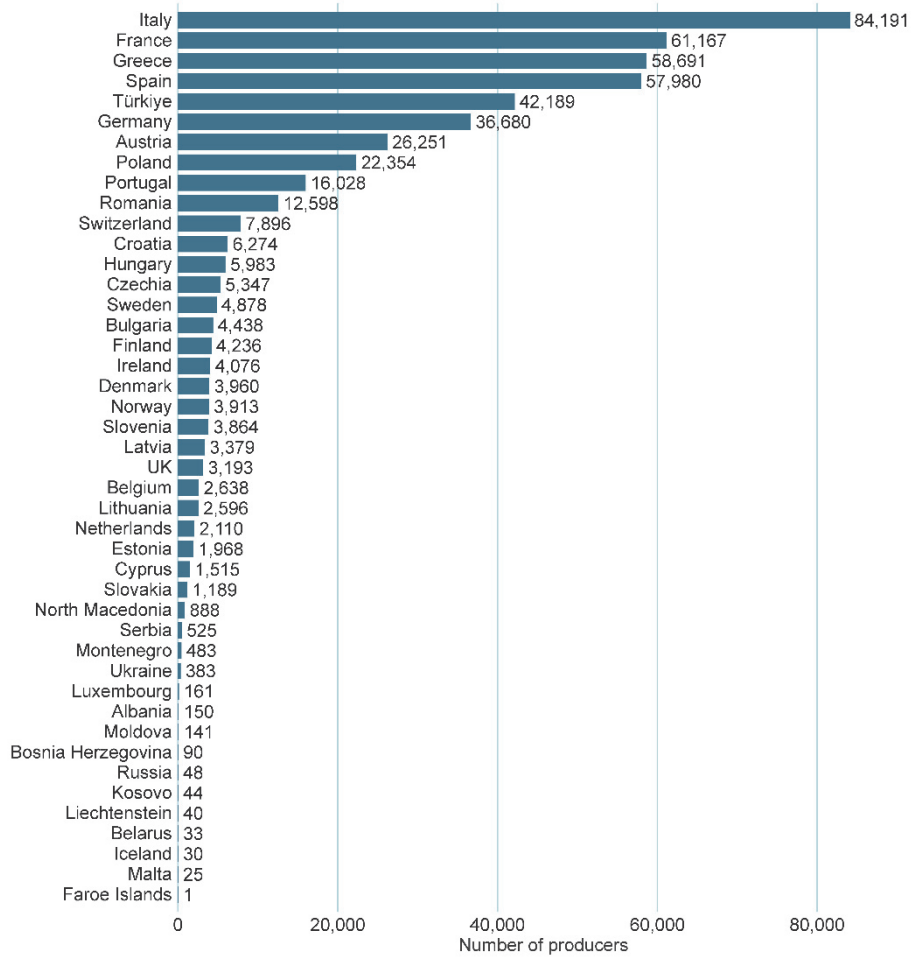


Figure 83: Europe: Number of organic producers by country 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. For detailed data sources, see annex, page 333.

5 Organic imports and exports

The European Union, representing the second-largest organic single market, has shared data on its organic imports. This marks the fifth instance of them providing information on key import products and the primary importing countries, based on volume in metric tons (MT). For further details, including figures, please refer to the European Commission's contribution on EU organic imports (page202).

Additionally, the United States offers both export and import data, including volume and value, although this information does not cover all commodities.

Some European countries also provide export and import values. However, since the latter dataset is incomplete, drawing conclusions regarding total values and growth rates for Europe or the European Union becomes challenging (see page 322, **Table 78**).

- **EU organic import volume:** In 2023, the EU imported a total of 2.47 million metric tons of organic agri-food products. Compared to 2022, EU organic imports declined by 9.1 percent.
- **EU organic import volume by importing country:** In 2023, the largest importers (based on import volume in metric tons) were the Netherlands (795'383 metric tons), followed by Germany and Belgium. It's important to note that a significant portion of Dutch imports is resold to other EU countries.
- **EU organic import volume by exporting country:** Ecuador was the largest supplier of organic agri-food products to the EU, providing 0.36 million metric tons, which corresponds to almost 15 percent of the total organic import volume. An increase (+67 percent) in imports of wheat was recorded in 2023, with most imports coming from Türkiye and Ukraine.
- **EU organic import volume by product group:** Tropical fruit was the most important product group, accounting for 0.77 million metric tons (almost one-third of all EU organic imports, primarily bananas), followed by oil cakes and soybeans.
- **European export volumes to the US:** According to US data, European countries exported a volume of at least 0.29 million metric tons to the United States, constituting 10 percent of all US organic imports of 2'764'150 metric tons. Approximately 110'000 metric tons came from Turkey, followed by Russia and Romania, all of which increased their export volumes considerably. Please note that the US organic import statistics covers only selected products/product groups and is therefore not complete.
- **European export and import value:** Limited data is available on this. Italy showed the largest export value (3.6 billion euros), and France had the highest import value (2.8 billion euros in 2021). Unfortunately, no such data was available from Germany, the largest market in Europe, or other countries (Table 78, page322).

Europe: Exports to the US by country 2023

Sources: GATS/USDA 2024

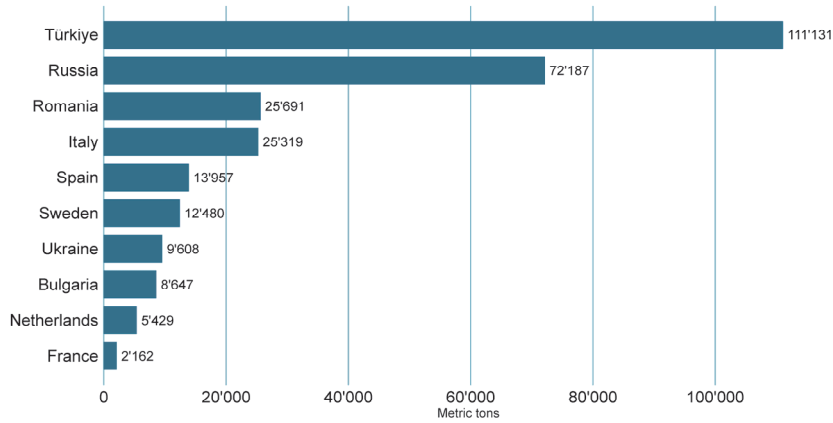


Figure 84: European organic exports to the US: Top 10 European exporters 2023

Source: GATS/USDA

Europe: Organic exports to the US 2018-2023

Sources: GATS/USDA

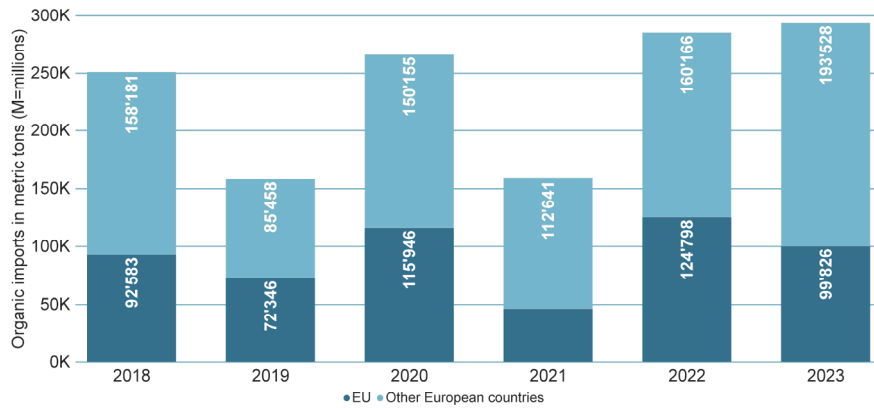


Figure 85: European organic exports to the US: Development 2018-2023

Source: GATS/USDA.

6 Organic retail sales

In 2023, organic retail sales in Europe amounted to 54.7 billion euros, including 46.5 billion euros in the European Union, reflecting a growth of 3.0 percent in Europe and 2.9 percent in the EU. The market had contracted in 2022 due to challenges such as the war in Ukraine, soaring energy prices, and rising living costs, which fuelled inflation across many countries. However, 2023 marked a recovery, signalling renewed consumer confidence and demand for organic products.

Unfortunately, not all countries provide data on their domestic markets regularly, and it may be assumed that the market is larger than indicated in this volume.

Figures on the organic retail sales can be found on the following pages; tables are in the annex.

Table 25: Europe and the European Union: Organic retail sales 2023: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2022-2023 [%]	Growth 2014-2024 [%]
Europe	54'748.6	66	3.0%	+109.0%
European Union	46'486.9	104	2.9%	+114.2%

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333. Please note that the EU number is not always comparable to what was communicated in previous years as data revisions are carried out.

Size of the organic market

Germany remained the largest market in Europe, with a total of 16.1 billion euros, making it the second-largest organic market in the world, following the United States. France held the second position in Europe with 12.1 billion euros in organic retail sales. When comparing organic markets on a global scale, the United States took the lead. It accounted for 43 percent of global organic retail sales, totalling 58.6 billion euros, followed by the European Union at 46.5 billion euros, representing 34 percent of the global organic market. It's worth noting that the EU's share of the global market decreased compared to previous years, due to the fact that the market grew slower in the EU than in the US and partly due to the strengthening of the US dollar against the euro.

In terms of retail sales by region, Europe accounted for 40.1 percent (54.7 billion euros), while North America constituted 46.8 percent (63.9 billion euros). Once again, it's important to consider the fluctuating euro – US dollar exchange rate when comparing data over different years.

Organic retail sales shares

The organic share of retail sales shows the importance of the organic market in a given country. As in the past, the highest market shares were reached in Denmark (11.8 percent, the highest organic market share in the world), Switzerland (11.6 percent) Austria (11.0 percent). Organic market shares decreased in many countries in 2023 due to high inflation rates and a sharp rise in food prices across the entire food market.

Market shares of individual products and product groups can be far higher; these data are provided in the table at the end of this chapter. Some newer products, such as meat and milk alternatives, have achieved market shares of more than half of the entire food market.

Growth of the organic market

In 2023, organic retail sales in Europe reached 54.7 billion euros (46.5 billion euros in the EU), marking an increase of 3.0 percent in Europe and 2.9 percent in the European Union. While the market contracted in some countries, in other countries, such as Estonia (+13.0 percent), the Netherlands (+12.5 percent), and Austria (+6.5 percent), retail sales increased in 2023.

From 2014 to 2023, the values of Europe's and the EU's organic retail sales more than doubled.

Per capita consumption of organic food

As in previous years, Switzerland (468 euros) and Denmark (362 euros) continued to lead Europe—and the world—in per capita consumption of organic food. In 2023, seven countries achieved per capita consumption exceeding 100 euros, reflecting steady consumer interest in organic products. On average, per capita consumption in Europe stood at 66 euros, while in the EU it reached 104 euros.

Comparison of organic products and product groups with the total market

While the organic share of the total market is an important indicator, it's also crucial to consider the organic market shares that individual products can achieve. In many countries, organic eggs stand out as a success story within the overall retail market, often reaching impressive proportions of the entire egg market. For example, in Denmark and Switzerland, organic eggs have captured more than 30 percent of the market share in terms of value. When looking at product groups, vegetables and fruits consistently attain the highest market shares, with more than 10 percent in many countries (Table 26).

Marketing channels in organic agriculture

Some countries can break down their retail sales data by marketing channel. Catering sales/food service are a separate category and not included in the retail sales data.

Figure 22 shows that the importance of various retail marketing channels (excluding food service/catering) varies from country to country. The strongest growth in the 2018-2023 period was observed in general retailers (including discounters). However, retail sales also decreased for general retailers in some countries, while discounters increased in most cases (where data is available). Natural food stores play an important role in France, Italy and Germany.

Food service

A notable trend is the significantly stronger growth of organic catering sales compared to retail sales in several countries during 2023, a pattern already observed in 2022. In Denmark, organic catering sales grew by 12 percent from 2022 to 2023, far outpacing the 0.4 percent decrease in retail sales during the same period. Although data on organic

catering and food service sales remain limited in many countries, the trend seen in Denmark reflects a broader pattern observed in other countries as well (Figure 94).

Europe: Organic retail sales by country 2023

Source: FiBL survey 2025

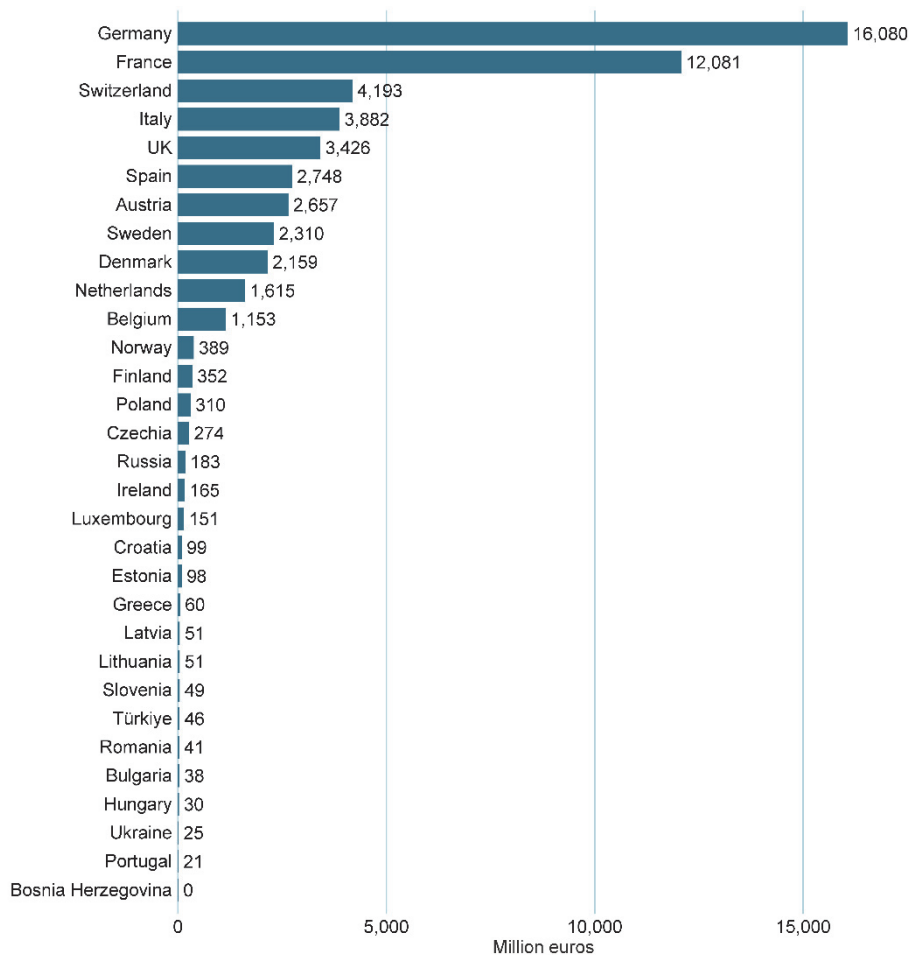
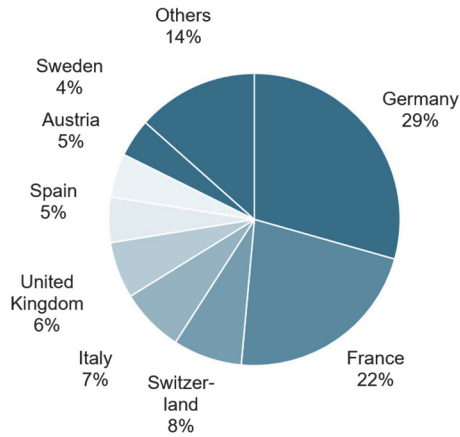


Figure 86: Europe: Retail sales by country 2023

Source: FiBL-AMI survey 2025 based on national data sources. Please note that updated data were not available for all countries. For detailed data sources, see annex, page 333.

Europe: Distribution of retail sales value by country 2023

Source: FiBL-AMI survey 2025



World: Distribution of retail sales value by single market 2023

Source: FiBL-AMI survey 2025

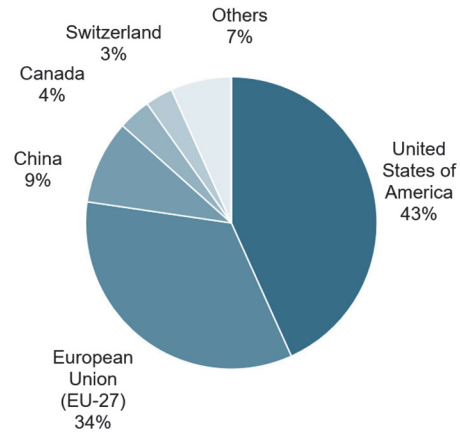


Figure 87: Europe: Distribution of retail sales by country and by single market worldwide 2023

Source: FiBL-AMI survey 2025 based on national data sources

Europe: The countries with the highest shares of the total retail sales 2021 and 2023

Source: FiBL-AMI survey 2025

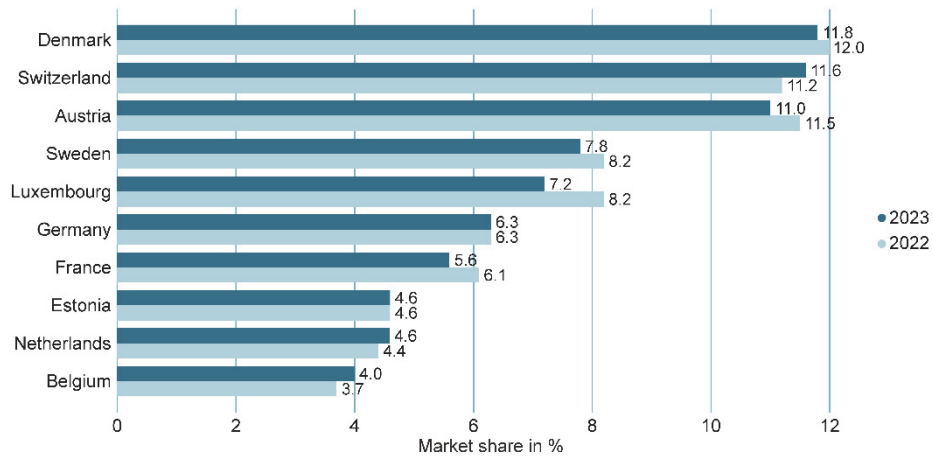


Figure 88: Europe: The countries with the highest shares of total retail sales 2022 and 2023

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333.

Europe and the European Union: Growth of organic retail sales 2000 - 2023

Source: FiBL-AMI surveys 2001-2025

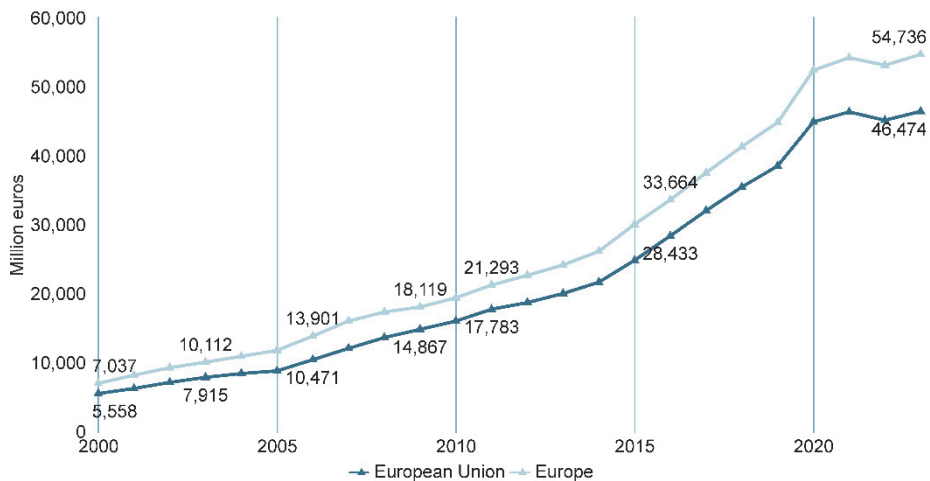


Figure 89: Growth of organic retail sales in Europe and the European Union, 2000-2023

Source: FiBL-AMI surveys 2004-2025, and OrganicDataNetwork Surveys 2013-2015

Europe: Development of organic retail sales 2023

Source: FiBL-AMI survey 2025

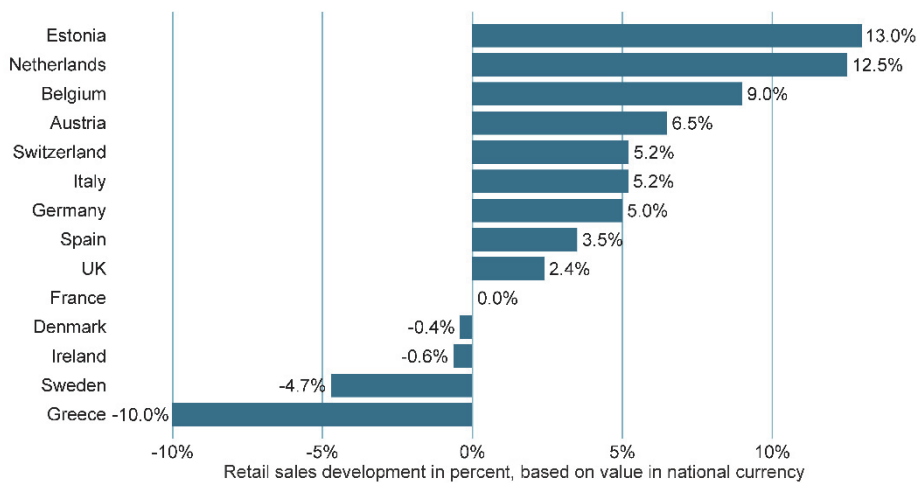


Figure 90: Europe: Organic retail sales development in select countries 2023

Source: FiBL-AMI survey 2025. For detailed data sources, see annex, page 333.

Europe: The countries with the highest per capita consumption 2023

Source: FiBL-AMI survey 2025

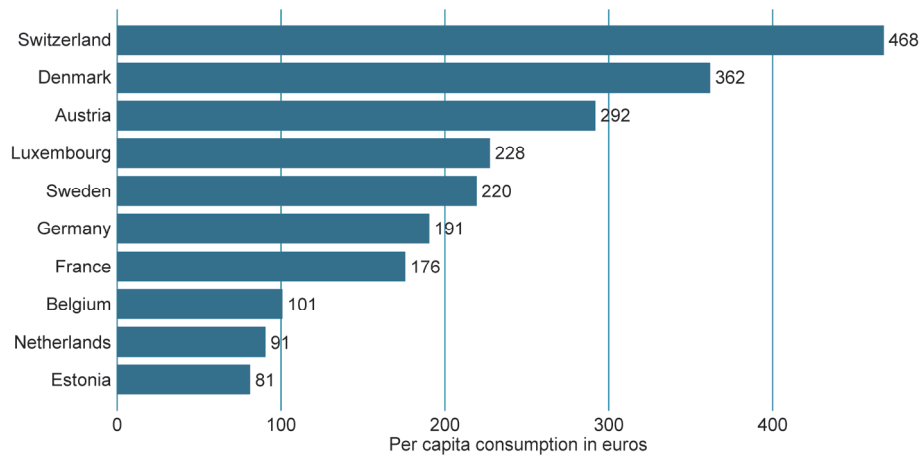


Figure 91: Europe: The countries with the highest per capita consumption 2023

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333.

Europe and European Union: Growth of the per capita consumption 2010-2023

Source: FiBL-AMI surveys 2006-2025

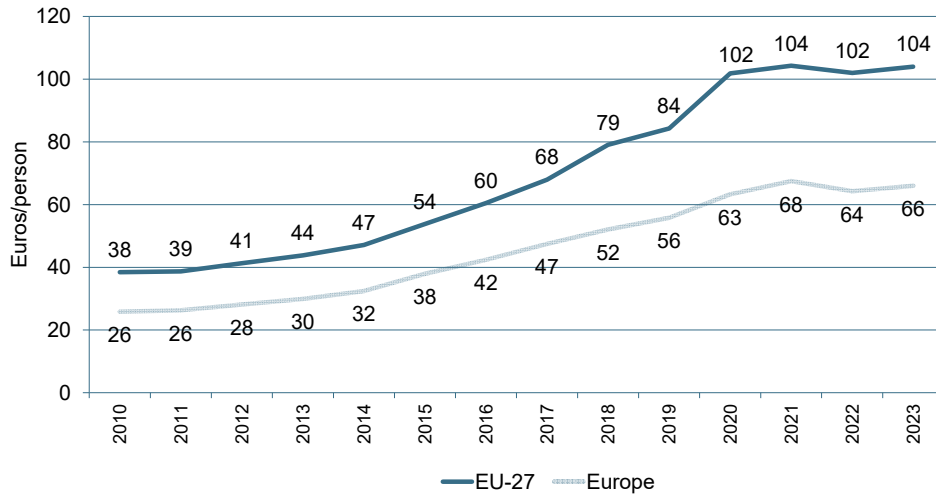


Figure 92: Europe: Growth of the per capita consumption 2009-2023

Source: FiBL-AMI survey 2025 based on national data sources. Calculation based on Eurostat population data. For detailed data sources, see annex.

Europe: Marketing channels for organic products in selected countries 2023

Source: FiBL-AMI survey 2025

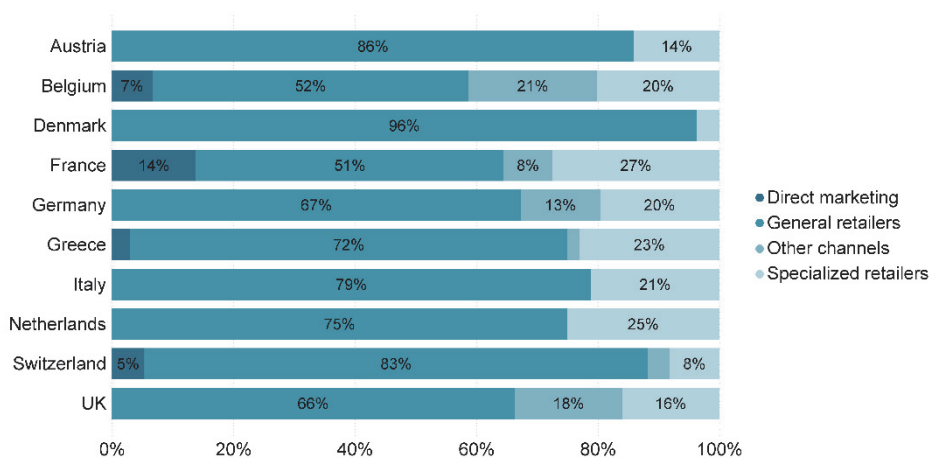


Figure 93: Europe: Marketing channels for organic products in selected countries 2023

Source: FiBL-AMI survey 2025 based on national data sources.
For detailed data sources, see annex, page 333.

Development of food service in Denmark (in Danish Crowns)

Source: Statistics Denmark

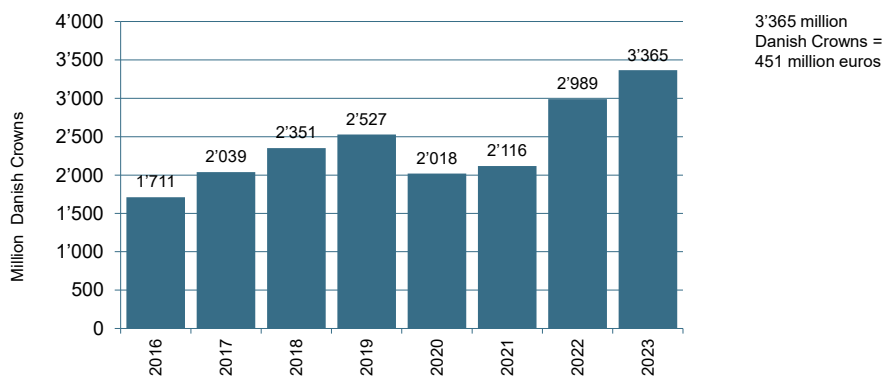


Figure 94: Denmark: Growth of organic food service 2016-2023

Source: Statistics Denmark

Table 26: Organic shares (%) for retail sales values (euros) for selected products 2023

	Austria (2023)	Belgium (2023)	Czech Republic (2022)	Denmark (2023)	Finland (2023)	Germany (2023)	Netherlands (2023)	Sweden (2023)	Switzerland (2023)	UK (2023)
Baby food					23.0			21.9		64.9
Beverages		2.5	0.4						4.9	
Bread & bakery products		7.0 (bread)	1.0	4.7 (rye bread)		6.7 (bread)	1.6	0.6 (bread)	27.1 (bread)	0.2
Eggs	19.2	15.8		37.0	13.0	20.4	17.6	19.4		8.5
Fish and fish products							1.9			
Fresh vegetables	22.7	8.0		35.2	2.0	13.0			25.4	4.8
Fruit	16.2	6.6			6.0	8.9			20.2	3.0
Fresh vegetables and fruit			2.3				7.5			
Meat/meat products	6.9 (meat)	5.4 (meat)	0.5	8.2 (beef)		5.7 (beef & pork)	4.5	6.2 (beef)	6.5 (incl. fish)	1.6 (incl. fish)
Milk and dairy products			2.0				5.0		11.8	3.9
- Butter	10.5					6.2				2.2
- Cheese	10.3	3.7		10.9		5.5		1.6		0.9
- Milk	28.3	2.6		41.9	3.0	14.7		11.1		4.9
- Yoghurt/Quark	24.7					10.3				8.5
Organic share of total food market	11.0	3.7	1.7	12.0	1.9	6.3	3.3	8.2	11.6	1.6

Sources: FiBL-AMI survey 2025, based on data from Austria: Roll/AMA/GfK Roll/AMA/YouGov Consumer Panel Austria provided by AMA-Marketing, Belgium: Biowallonie; Czech Republic: UZEI; Denmark: Organic Denmark based on Kauzas Household panels prepared for Organic Denmark, provided by Danish Agriculture & Food Council, Finland: Pro Luomu; France: Agence Bio; Germany: Agricultural Market Information Company AMI based on GfK; Italy: supermarkets and discounters only, data provided by Marche Polytechnic University; Netherlands: Bionext; Sweden: Organic Sweden and Ekologiska Lanbrukarna; Switzerland: Bio Suisse based on Nielsen; UK: Soil Association Certification/ based on NIQ.

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.

Outlook

In 2023, organic farmland and the number of organic producers continued to grow at a moderate pace. The organic retail sales in Europe and the EU expanded similarly, in line with the increase in area and producers. Growth was mainly by higher prices.

Despite these positive trends, economic challenges remained at the forefront. Declining household incomes and rising consumer goods costs, including energy, led some segments of the population to alter their purchasing habits. While some consumers reduced their consumption of organic products, others sought more affordable alternatives. An interesting trend emerged in Germany, where discount stores saw robust growth in organic product sales, even amid significant price increases in these outlets.

Looking ahead, 2024 still presented challenges for the organic market. However, preliminary data suggests that some markets are showing signs of recovery, offering hope for continued growth. Growth was not only driven by higher prices but also by an increase in the volume of products purchased.

To meet the EU's Farm to Fork target of 25 percent organic farmland in Europe by 2030, timely and effective support measures will be crucial. Addressing economic challenges and ensuring that organic products remain accessible to all consumers will be key to sustaining growth in the organic sector.

Acknowledgements

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The full data set as well previous editions of this brief are available on the European Commission's webpage on agricultural markets in the organic sector at https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector_en
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EU Imports of Organic Agri-food Products - Key Developments in 2023

Summary of the European Commission's Analytical Brief No. 4¹

Highlights

This article summarises the Analytical Brief No. 4, "EU imports of organic agri-food products - Key developments in 2023", published by the European Commission, DG Agriculture and Rural Development. Data on import volumes of organic products come from the Commission's online management tool TRACES (TRAdE Control and Expert System). The import data are summarised in terms of origin and destination, as well as in terms of product classes and categories.

Volumes of imported organic products down by 9.1 percent in 2023

- Total imports of organic agri-food products in the European Union (EU) decreased from 2.73 million metric tons in 2022 to 2.48 million metric tons in 2023 (-9.1 percent), the lowest level since 2018. The decline reflects a reduction in demand due to the sharp increase in food prices over the last two years.
- Most of this decline can be attributed to the reduced imports of fruit and vegetables, sugar, olive and palm oils, sunflower seed, and pet food. Increases in imports of organic soybeans, oilcakes, citrus fruit, rice and honey did not compensate.

Primary products account for almost 90 percent of EU organic imports

The EU is a major importer of commodities and other primary products². The combined share of these products in organic imports (89 percent) was higher than that in total

¹ European Commission (2024): EU imports of organic agri-food products. Key developments in 2023. Analytical Brief No.4. European Commission, DG Agriculture and Rural Development, Brussels. July 2024. Available at: https://agriculture.ec.europa.eu/document/download/3f8a9f29-8093-4d67-9a26-0655ef1f1cbb_en?filename=analytical-brief-4-eu-organic-imports_en.pdf.

The full data set as well previous editions of this brief are available on the European Commission's webpage on agricultural markets in the organic sector at https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector_en

² The product categories are as follows:

- › "Commodities" includes, among others: cereals, vegetable oils and oilseeds, sugars, milk powders and butter, unroasted coffee and cocoa.
- › "Other primary" includes meat products, fruit and vegetables, milk yoghurt and honey. "Processed" includes cheese, meat preparations, wine and fruit juices.
- › "Food preparations" includes infant food, confectionary and pasta.
- › "Beverages" includes beers, spirits and soft drinks.
- › "Non-edible" includes plants and essential oils.
- › Furthermore, in its scope, the organic regulation also covers products of other sectors, which are reported under "Fish and other non-agri".

(organic plus conventional) agricultural imports (83 percent).

- An increase (+67 percent) in imports of wheat was recorded in 2023, with most imports coming from Türkiye (62 percent share) and Ukraine (21 percent). Also, olive oil imports increased significantly (+25 percent), coming almost entirely from Tunisia.
- Overall imports of commodities in terms of volume have decreased by 13.7 percent to 1.08 million metric tons, mainly due to fewer imports of organic oilcakes from India, soybeans from Togo and sugar from Central and Latin America.
- Imports of Other primary products in terms of volume have decreased less significantly, by 4.6 percent to 1.12 million metric tons. Most of this decrease was due to the 17 percent reduction of imports of non-tropical fruit to 98 thousand t. Imports of tropical fruit, of which banana share was 82 percent, have decreased by 2.4 percent to 790 thousand t.
- Imports of higher-value organic products have also mainly decreased. A 25 percent reduction in fruit juice imports resulted in a 7.8 percent decrease to 181 thousand metric tons for the “Processed products” category. Imports of food preparations, however, remained stable at 63 thousand metric tons. Imports of non-edible and non-agri organic products decreased by 19 percent to 31 thousand metric tons, while Beverages fell to 2’400 metric tons (-9 percent).

More than a quarter of all imported olive oil is organic

- Out of 173 thousand metric tons of olive oil imported into the EU in 2023, 46’000 metric tons or 26.6 percent, was organic, coming almost exclusively from Tunisia. This share beats a previous record reached in 2021 (24.0 percent). Imports of organic olive oil increased by 25 percent compared to 2022, while imports of non-organic olive oil decreased by 5.5 percent.
- Among the other products with a significant organic share in imports in 2023 were miscellaneous seeds (10.3 percent), tropical fruit (9.9 percent), honey (7.2 percent) and bulbs, roots and live plants (5.8 percent), but all of them saw reductions in the share of total imports.

Ecuador increased the lead among the top origins of organic imports, Türkiye makes the most gains

- Ecuador remains at the top of the exporters of organic products to the EU, with a further increase in volumes of exports of organic bananas (+5 percent). The Dominican Republic, however, dropped to 3rd place after its exports of organic bananas decreased by 24 percent.
- Imports from China increased by 3 percent thanks to a 12 percent increase in oilcakes, which was enough to make it 2nd most important origin.

- Imports from Türkiye grew fastest among the top suppliers (+44 percent), mainly thanks to an increase in vegetables, wheat, and other cereals. On the other hand, sharp declines in organic imports were registered from Ukraine (-21 percent, mainly in cereals), Togo (-17 percent, in soybeans) and especially India (-51 percent, in oilcakes).

Netherlands remains the top destination in the EU, Italy passes France

- The Netherlands was again the top destination of organic imports in the EU but saw a significant decline in total volumes (-20 percent). Germany (-7 percent) and Belgium (+2 percent) remain the 2nd and 3rd destination, while Italy (+40 percent) has leapfrogged France (-18 percent) for the 4th spot thanks to a big increase in imports of wheat and tropical fruit.
- Among other main EU importers, Sweden reduced organic imports by 9 percent, Denmark and Austria increased by 9 percent, while Spain and Ireland imports were stable.
- Most of the New Member States (NMS) saw a decrease in imports, most notably Poland (-17 percent), Czechia (-51 percent) and Lithuania (-30 percent). Overall, the share of the NMS in the total EU imports of organic products EU has decreased from 4.4 percent in 2022 to 3.2 percent in 2023.

European Union: The ten countries with the largest export volumes to the EU 2023

Source: Traces/European Commission 2025

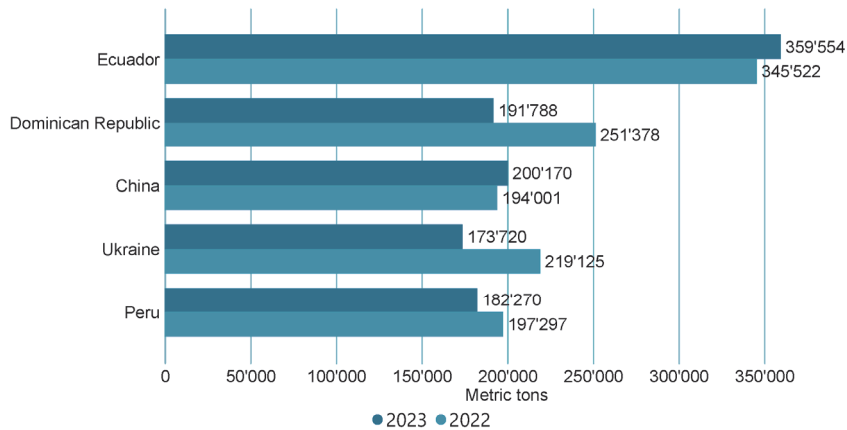


Figure 95: European Union: The five countries with the largest export volume to the European Union 2022 and 2023 compared

Source: European Commission/TRACES 2024

European Union: Organic agri-food imports by country 2023

Source: Traces/European Commission 2024

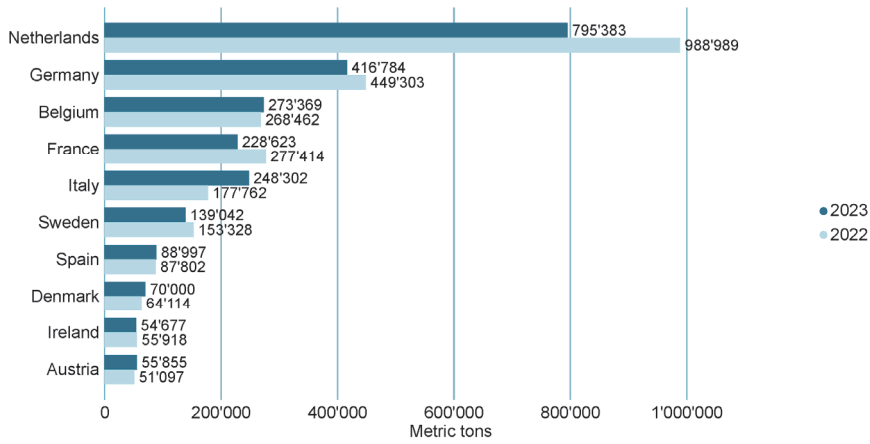


Figure 96: European Union: The largest importers 2022 and 2023

Source: European Commission/TRACES 2024

European Union: The largest export volumes by product

Source: Traces/European Commission 2024

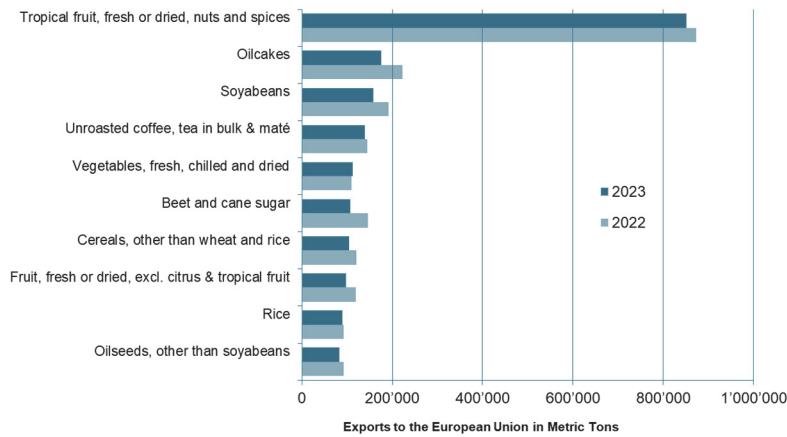


Figure 97: EU Organic imports by product 2022 and 2023 compared

Source: European Commission/TRACES 2024

European Union: Organic agri-food imports development 2018 - 2023

Source: Traces/European Commission 2025

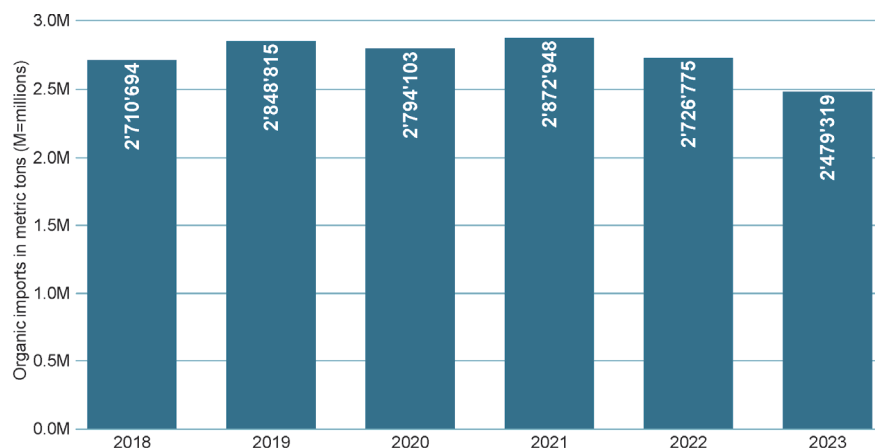


Figure 98: European Union: EU Organic imports: Development

Source: European Commission/TRACES 2024

Table 27: European Union: Organic agri-food import volumes by class, 2022 and 2023 (thousand metric tons (MT))

	2022 [1000 MT]	2023 [1000 MT]	Change [%]
Other primary	1'176	1'122	-4.6 %
Commodities	1'251	1'080	-13.7 %
Processed products, incl. wine	197	181	-7.8 %
Food preparations	63	63	0.3 %
Non-edible	22	18	-18.5 %
Fish and other non-agri	16	13	-18.8 %
Beverages	2.6	2.4	-9.0 %
Total	2'727	2'479	-9.1 %

Source: European Commission/TRACES 2024

For a definition of commodities, see Footnote 2

Table 28: European Union: Organic fruit and vegetables import volumes by product category, 2022 and 2023 (thousand metric tons)

Product group	2022 [1000 MT]	2023 [1000 MT]	Change [%]
Tropical fruit, fresh or dried, nuts and spices	872	851	-2.4
Vegetables, fresh, chilled and dried	109	112	2.7

Product group	2022 [1000 MT]	2023 [1000 MT]	Change [%]
Fruit, fresh or dried, excl. citrus & tropical fruit	119	98	-17.4
Preparations of vegetables, fruit or nuts	61	62	0.8
Fruit juices	80	60	-25.1
Citrus fruit	43	33	-22.8
Total	1'285	1'217	-5.3

Source: European Commission/TRACES 2024

Table 29: European Union: Organic arable crops import volumes by product category (in thousand metric tons)

Product group	2022 [1000 MT]	2023 [1000 MT]	Change [%]
Oilcakes	223	176	-21.1%
Soyabeans	192	158	-17.6%
Beet and cane sugar	146	107	-26.2%
Cereals other than wheat and rice	121	105	-13.3%
Rice	93	89	-4.1%
Oilseeds other than soyabeans	93	83	-10.3%
Wheat	32	53	67.4%
Sugar, other than beet & cane	45	44	-3.1%
Palm & palm kernel oils	34	33	-2.6%
Flours and other products of the milling industry	15	11	-25.8%
Vegetable oils other than palm & olive oils	17	11	-34.3%
Starches, inulin & gluten	3.5	3.8	7.5%
Total	1'014	875	-13.7%

Source: European Commission/TRACES 2024

Table 30: Organic permanent crops (excl. fruit) import volumes by product category, 2022 and 2023 (thousand metric tons)

Product group	2022 [1000 MT]	2023 [1000 MT]	Change [%]
Unroasted coffee, tea in bulk & maté	145	140	-3.7
Cocoa beans	73	56	-22.8
Olive oil	37	46	25.1
Wine, vermouth, cider and vinegar	15	11	-29.5
Roasted coffee and tea	2.8	2.5	-10.1
Cocoa paste and powder	1.6	2.1	26.4
Total	274	257	-6.2

Source: European Commission/TRACES 2024

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Table 31: European Union: Organic animal products import volumes by product category, 2022 and 2023 (thousand metric tons)

Product/Product group	2022 [1000 MT]	2023 [1000 MT]	Change [%]
Eggs and honey	17.7	13.1	-25.9
Fresh milk and cream, buttermilk and yoghurt	4.5	5.2	16.0
Bovine meat, fresh, chilled and frozen	1.1	0.86	-23.0
Milk powders and whey	3.2	0.77	-75.8
Non-edible animal products	1.1	0.60	-46.8
Cheese	0.57	0.50	-11.8
Butter	0.02	0.14	490.1
Poultry meat, fresh, chilled and frozen	0.11	0.08	-23.1
Sheep and goat meat, fresh, chilled and frozen	0.15	0.06	-57.6
Meat preparations	0.01	0.03	181.7
Pigmeat, fresh, chilled and frozen	0.07	0.02	-75.3
Offal, animal fat & other meats, fresh, chilled and frozen	0	0.01	
Total	29	21	-25.0

Source: European Commission/TRACES 2024

Table 32: European Union: Organic import volumes by exporting country, 2022 and 2023 (metric tons)

Rank	Exporting countries	2022 imports [MT]	2023 Imports [MT]	Change [%]	Share in total [% , 2023]
1	Ecuador	345'522	359'554	4.1	14.5
2	China	194'101	200'170	3.1	8.1
3	Dominican Republic	251'378	191'788	-23.7	7.7
4	Peru	197'297	182'270	-7.6	7.4
5	Ukraine	219'125	173'720	-20.7	7.0
6	Türkiye	104'041	150'012	44.2	6.1
7	Colombia	120'875	120'189	-0.6	4.8
8	Togo	125'619	104'068	-17.2	4.2
9	India	139'243	68'109	-51.1	2.7
10	United Kingdom	52'917	56'471	6.7	2.3
11	Tunisia	46'453	54'225	16.7	2.2
12	Pakistan	50'848	49'959	-1.7	2.0
13	Mexico	57'803	48'728	-15.7	2.0
14	Honduras	38'272	45'205	18.1	1.8
15	Brazil	65'977	44'793	-32.1	1.8
16	Côte d'Ivoire	35'134	38'170	8.6	1.5
17	Sri Lanka	37'298	37'142	-0.4	1.5
18	Egypt	41'296	35'531	-14.0	1.4
19	Argentina	46'624	27'183	-41.7	1.1
20	Uganda	20'990	26'951	28.4	1.1
21	Kazakhstan	29'896	24'989	-16.4	1.0
22	Paraguay	31'253	23'026	-26.3	0.9

Rank	Exporting countries	2022 imports [MT]	2023 Imports [MT]	Change [%]	Share in total [%, 2023]
23	Ghana	20'361	22'779	11.9	0.9
24	Canada	21'172	22'471	6.1	0.9
25	South Africa	34'526	21'791	-36.9	0.9
26	Costa Rica	16'122	19'420	20.5	0.8
27	Burkina Faso	20'311	18'076	-11.0	0.7
28	Morocco	20'428	16'965	-17.0	0.7
29	Serbia	14'324	16'959	18.4	0.7
30	Philippines	17'873	16'403	-8.2	0.7
31	Kenya	11'890	15'202	27.9	0.6
32	Chile	20'878	14'876	-28.7	0.6
33	Sierra Leone	16'586	14'816	-10.7	0.6
34	Russia	9'484	13'955	47.1	0.6
35	Thailand	15'734	13'097	-16.8	0.5
36	Vietnam	12'979	12'471	-3.9	0.5
37	Israel	18'045	12'223	-32.3	0.5
38	Moldova	12'211	12'191	-0.2	0.5
39	United States	8'903	12'104	35.9	0.5
40	Congo, Democratic Republic	13'765	11'866	-13.8	0.5
41	Laos	3'712	11'028	197.1	0.4
42	Bolivia	10'702	9'860	-7.9	0.4
43	Cambodia	12'162	9'204	-24.3	0.4
44	Tanzania	5'685	8'102	42.5	0.3
45	Indonesia	9'494	7'798	-17.9	0.3
46	Bosnia and Herzegovina	10'490	6'935	-33.9	0.3
47	New Zealand	14'670	6'724	-54.2	0.3
48	Ethiopia	13'845	6'447	-53.4	0.3
49	Mozambique	7'733	6'315	-18.3	0.3
50	São Tomé and Príncipe	4'261	6'082	42.7	0.2
51	Madagascar	7'856	5'855	-25.5	0.2
52	Nicaragua	4'473	5'050	12.9	0.2
53	Mali	3'774	3'827	1.4	0.2
54	Sudan	8'447	3'429	-59.4	0.1
55	Japan	3'851	3'342	-13.2	0.1
56	Guatemala	3'441	2'331	-32.3	0.1
57	Cuba	3'695	2'236	-39.5	0.1
58	Benin	14'740	2'131	-85.5	0.1
59	Senegal	1'895	2'035	7.4	0.1
60	Algeria	1'379	1'910	38.6	0.1
61	Azerbaijan	1'227	1'462	19.1	0.1
62	Iran	2'040	1'436	-29.6	0.1
63	Papua New Guinea	1'501	1'295	-13.7	0.1
64	Albania	1'440	1'263	-12.3	0.1
65	Kyrgyzstan	865	929	7.4	0.0
66	Australia	1'301	929	-28.6	0.0
67	Uruguay	1'234	710	-42.4	0.0
68	Lesotho	678	705	4.1	0.0
69	Rwanda	838	694	-17.2	0.0
70	Georgia	738	677	-8.2	0.0
71	Palestinian Territory, Occupied	640	623	-2.7	0.0
72	United Arab Emirates	515	590	14.8	0.0

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Rank	Exporting countries	2022 imports [MT]	2023 Imports [MT]	Change [%]	Share in total [%, 2023]
73	Guinea-Bissau	604	584	-3.2	0.0
74	Uzbekistan	657	547	-16.7	0.0
75	Nigeria	646	472	-26.9	0.0
76	Guyana	356	430	21.0	0.0
77	Chad	2'274	416	-81.7	0.0
78	Kosovo	370	408	10.3	0.0
79	Niger	720	400	-44.4	0.0
80	Nepal	337	303	-10.0	0.0
81	Haiti	275	300	9.2	0.0
82	Saudi Arabia	266	286	7.8	0.0
83	El Salvador	213	277	30.3	0.0
84	Panama	193	273	42.1	0.0
85	Cameroon	295	266	-9.8	0.0
86	Hong Kong	96	261	172.7	0.0
87	North Macedonia	447	258	-42.4	0.0
88	Zimbabwe	293	253	-13.6	0.0
89	Maldives	577	223	-61.4	0.0
90	Belarus	271	167	-38.4	0.0
91	Syria	33	133	300.4	0.0
92	South Korea	215	117	-45.5	0.0
93	Namibia	75	114	50.4	0.0
94	Taiwan	106	112	5.8	0.0
95	Jordan	70	107	53.8	0.0
96	Armenia	71	82	16.2	0.0
97	Samoa	100	82	-17.9	0.0
98	French Polynesia	68	65	-4.9	0.0
99	Fiji	24	64	168.7	0.0
100	Burundi	69	58	-16.6	0.0
101	Belize	59	44	-25.5	0.0
102	Suriname	62	43	-31.2	0.0
103	Zambia	86	35	-59.1	0.0
104	Guinea	0	27	n/a	0.0
105	Myanmar	24	27	11.8	0.0
106	Malaysia	15	27	74.4	0.0
107	Venezuela	0	25	n/a	0.0
108	Liberia	104	25	-75.9	0.0
109	Montenegro	24	25	3.7	0.0
110	Somalia	33	19	-44.0	0.0
111	Timor-Leste	21	18	-12.0	0.0
112	Dominica	0	17	n/a	0.0
113	Lebanon	23	13	-41.0	0.0
114	Comoros	24	13	-45.3	0.0
115	Singapore	20	10	-49.6	0.0
116	Seychelles	19	10	-46.2	0.0
117	Grenada	9	8	-5.3	0.0
118	Mauritius	1	1	14.2	0.0
119	Oman	0	0	n/a	0.0
120	New Caledonia	0	0	-29.6	0.0
121	Angola	4	0	-98.1	0.0
122	Afghanistan	0	0	n/a	0.0

Rank	Exporting countries	2022 imports [MT]	2023 Imports [MT]	Change [%]	Share in total [%, 2023]
123	Solomon Islands	17	0	-100.0	0.0
124	Switzerland	12	0	-100.0	0.0
125	Bangladesh	55	0	-100.0	0.0
	Total	2'727'206	2'479'319		-9.1

Source: European Commission/TRACES 2024

Table 33: European Union: Organic import volumes by product category, 2022 and 2023 (MT)

Rank	Product categories	2022 imports [MT]	2023 Imports [MT]	Change [%]	Share in total [%, 2023]	Estimated share organic/ total imports (%, 2023 imports)
1	Tropical fruit, fresh or dried, nuts and spices	872'234	851'498	-2.4	34.3	9.9%
2	Oilcakes	223'028	175'880	-21.1	7.1	0.8%
3	Soyabean	191'898	158'105	-17.6	6.4	1.2%
4	Unroasted coffee, tea in bulk & maté	145'263	139'856	-3.7	5.6	5.1%
5	Vegetables, fresh, chilled and dried	109'298	112'274	2.7	4.5	1.8%
6	Beet and cane sugar	145'651	107'479	-26.2	4.3	3.6%
7	Cereals other than wheat and rice	120'743	104'657	-13.3	4.2	0.5%
8	Fruit, fresh or dried, excl. citrus & tropical fruit	118'967	98'311	-17.4	4.0	2.8%
9	Rice	93'055	89'240	-4.1	3.6	3.9%
10	Oilseeds other than soyabean	92'700	83'186	-10.3	3.4	1.0%
11	Preparations of vegetables, fruit or nuts	61'136	61'610	0.8	2.5	2.6%
12	Fruit juices	80'284	60'099	-25.1	2.4	3.4%
13	Cocoa beans	72'694	56'116	-22.8	2.2	3.3%
14	Wheat	31'838	53'308	67.4	2.3	0.4%
15	Olive oil	36'757	45'979	25.1	1.8	26.6%
16	Sugar, other than beet & Cane	45'046	43'658	-3.1	1.3	3.1%
17	Palm & palm kernel oils	34'307	33'427	-2.6	1.9	0.6%
18	Citrus fruit	42'740	33'003	-22.8	0.7	1.4%
19	Food preparations not specified	31'926	28'427	-11.0	1.1	5.4%
20	Pet food	13'123	17'457	33.0	0.6	0.9%
21	Bulbs, roots and live plants	17'289	14'241	-17.6	1.3	5.8%
22	Eggs and honey	17'656	13'091	-25.9	0.5	5.6%
23	Fish	14'264	11'424	-19.9	0.4	n/a
24	Flours and other products of the milling industry	15'227	11'294	-25.8	0.5	2.0%
25	Vegetable oils other than palm & olive oils	16'648	10'936	-34.3	0.5	0.3%
26	Wine, vermouth, cider and vinegar	15'133	10'674	-29.5	0.4	1.6%
27	Miscellaneous seeds and hop cones	9'214	7'601	-17.5	0.3	10.3%
28	Infant food and other cereals, flour, starch or milk preparations	6'394	5'633	-11.9	0.2	1.4%

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Rank	Product categories	2022 imports [MT]	2023 Imports [MT]	Change [%]	Share in total [%, 2023]	Estimated share organic/ total imports (%, 2023 imports)
29	Fresh milk and cream, buttermilk and yoghurt	4'486	5'205	16.0	0.2	0.7%
30	Soups and sauces	5'206	5'107	-1.9	0.2	1.2%
31	Pasta, pastry, biscuits and bread	4'685	4'672	-0.3	0.2	0.4%
32	Gums, resins and plant extracts	12'539	4'668	-62.8	0.2	1.6%
33	Starches, inulin & gluten	3'537	3'803	7.5	0.2	2.4%
34	Roasted coffee and tea	2'775	2'496	-10.1	0.1	2.4%
35	Cocoa paste and powder	1'640	2'072	26.4	0.1	0.3%
36	Waters and soft drinks	2'081	1'982	-4.8	0.1	0.1%
37	Other non-agri	1'782	1'609	-9.7	0.0	n/a
38	Essential oils	1'439	1'076	-25.2	0.0	2.3%
39	Chocolate, confectionery and ice cream	828	1'051	26.9	0.1	0.2%
40	Casein, other albuminoidal sub. & mod. Starches	659	1'050	59.2	0.0	0.4%
41	Other feed and feed ingredients	1'878	942	-49.8	0.0	0.0%
42	Bovine meat, fresh, chilled and frozen	1'121	863	-23.0	0.0	0.3%
43	Milk powders and whey	3'190	772	-75.8	0.0	0.5%
44	Ethanol	798	664	-16.8	0.0	0.0%
45	Non-edible animal products	1'130	601	-46.8	0.0	0.1%
46	Cheese	567	500	-11.8	0.0	0.3%
47	Sugar alcohols	892	483	-45.8	0.0	0.5%
48	Coffee and tea extracts	408	400	-2.0	0.0	0.4%
49	Spirits and liqueurs	412	269	-34.6	0.0	0.0%
50	Butter	23	136	490.1	0.0	0.3%
51	Beer	105	134	28.6	0.0	0.0%
52	Poultry meat, fresh, chilled and frozen	108	83	-23.1	0.0	0.0%
53	Sheep and goat meat, fresh, chilled and frozen	147	62	-57.6	0.0	0.0%
54	Fatty acids and waxes	84	54	-35.7	0.0	0.0%
55	Malt	60	44	-27.4	0.0	0.1%
56	Meat preparations	10	27	181.7	0.0	0.0%
57	Pigmeat, fresh, chilled and frozen	68	17	-75.3	0.0	0.0%
58	Offal, animal fat & other meats, fresh, chilled and frozen	0	10	n/a	0.0	0.0%
59	Cut flowers and plants	6	3	-49.3	0.0	0.0%
60	Odoriferous substances	26	1	-95.3	0.0	0.0%
	Total	2'727'206	2'479'319	-9.1	0.0	1.6%

Source: European Commission/TRACES 2024

Achieving the EU Farm-to-Fork 25% Organic Target: How Can Policy Support This Goal?

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Introduction

With its Farm-to-Fork (F2F) and Biodiversity strategies, the European Union (EU) has set a very ambitious target of having at least 25 percent of the EU's agricultural land under organic production by 2030. Between 1985 and 2022, the EU's organic land and producers experienced a steady growth, doubling every decade to reach around 17 million hectares (10.54 percent) (Figure 99). The COVID-19 pandemic and the consequences of Russia's invasion of Ukraine for energy, fertiliser and food prices have impacted conversion confidence in several countries, including Germany, France and Austria. However, overall growth rates at the European level have remained consistent. Based on past growth trends, it is likely that 15 to 18 percent of the EU's utilised agricultural area (UAA), equivalent to 24 to 30 million hectares, could be managed organically by 2030 (see Figure 99). Reaching the 25 percent target (40 million hectares), however, represents a greater challenge, requiring at least a 50 percent increase in current growth rates. Without such growth, the 25 percent target might be reached between 2035 (exponential growth projection) and 2050 (linear growth projection).

While the organic land area has doubled, the market has grown nearly threefold each decade since 2000 (Figure 100). Continued exponential growth of this magnitude could result in a retail sales value of 80 billion euros by 2030. The market growth has, however, been impacted recently both by the pandemic (generating faster growth) and the effects of the war in Ukraine (slowing growth). Although some countries have continued to experience market growth, it remains to be seen when growth at EU level will restart. Market development is uneven across the EU, with some countries having well-established domestic markets, others relying heavily on exports and some still in the early stages of developing domestic or export markets. Continued market growth is important for producer confidence to convert their farms. The recent decline in market growth has led to a slow down or even negative conversion rates in some countries, but, as discussed above, this has been compensated by growth elsewhere.

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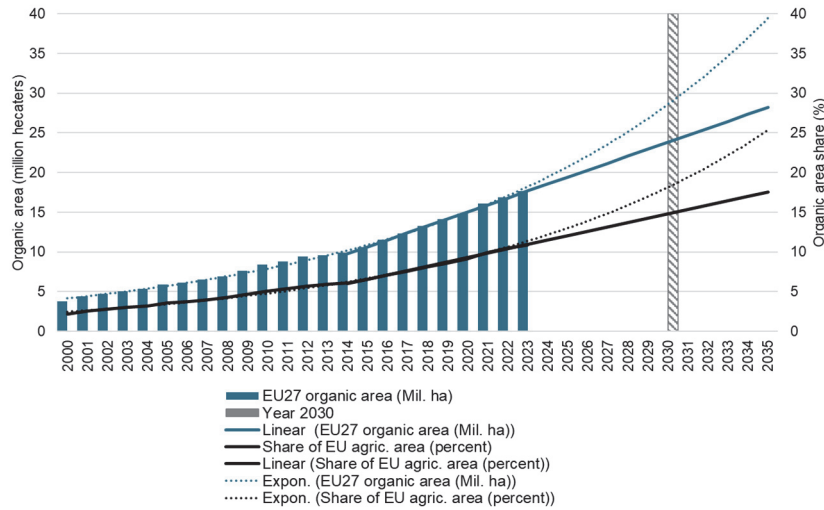


Figure 99: Growth of organic farmland in the EU from 2000 to 2023, and alternative exponential and linear projections to 2035

Source: FiBL statistics with projections added. Note: This chart uses linear and exponential (expon.) trendlines to show forecasts based on past data. A linear trendline represents a straight-line prediction, assuming the trend continues at a constant rate. An exponential trendline shows values that increase at an accelerating rate. Please note that these trendlines are only estimates, and actual results may vary.

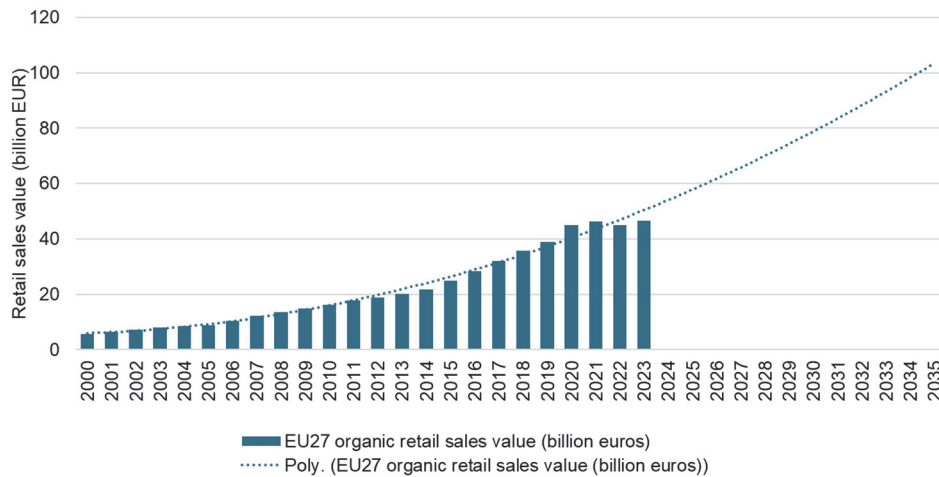


Figure 100: Growth of EU organic market from 2000 to 2023, with continued exponential growth projection to 2035

Source: own calculations based on FiBL Statistics. Note: In this chart, a polynomial (poly.) trendline has been used to forecast future values based on past data. However, please note that this trendline is only an estimate and actual results may vary.

Getting to more than 10 percent of EU agriculture organic is already a significant achievement. This was made possible by the introduction of a legal definition of organic farming in 1992, which provided a secure basis for the development of the organic market, and by the introduction of policy support for conversion to and maintenance of organic farming from 1994. Other forms of support, including market investment aids, public procurement, consumer promotion, advice, training, research and innovation have also played a role.

To bridge the gap between current growth trends and the ambitious 2030 objective, the EU is relying on supportive policy frameworks and targeted measures defined in current Common Agricultural Policy (CAP) Strategic Plans and national Organic Action Plans.

CAP Strategic Plans

In earlier CAP periods, the European Commission (EC) set the overall support framework for organic farming, within which Member States (MS) were obliged or encouraged to implement relevant measures. In the current CAP programming period (2023-2027), Member States are given more responsibility for defining specific measures to achieve the overall CAP objectives. Member States were required to produce national CAP Strategic Plans to specify how their national needs and priorities are aligned with the overall CAP environmental, economic and social objectives. These plans were agreed with the European Commission in late 2022.

Support for organic farming conversion and maintenance is included in all CAP Strategic Plans, with details of planned payment rates, eligibility conditions, estimated uptake and expenditure. This includes the Netherlands, which had not provided support in the previous two CAP programming periods, and France, which halted maintenance payments in 2018. For countries such as Spain, Italy, Germany and France, which previously had regional rural development plans, details on regional variations in payment rates and expenditures were also included. The support employs a mix of Pillar 1 (direct payments to stabilise farm incomes and support market measures) and Pillar 2 (rural development funds aimed at promoting environmental sustainability, competitiveness, and innovation) approaches. Similar support policies have been implemented in neighbouring countries, including Switzerland, Norway and the UK.

All EU Member States have set targets for organic land area to be achieved by 2027 or 2030 (Figure 1013), in either their CAP Strategic Plans or national organic action plans, or in a few cases separately. The national targets combined represent almost 19 percent of EU agricultural area, short of the EU target but consistent with continued exponential growth of the organic sector. As Figure 101 indicates, not all organic land received support payments in 2018 and this is likely to continue in the next period. In some countries (Austria, Italy and Sweden), the planned supported area for 2027 remains at or below the 2018 certified area. In addition, some of the national targets set for 2030 are significantly above the financial support provisions made for 2027. Germany in particular has a large divergence between the 30 percent organic target at federal level, and the 12 to 14 percent targets detailed in its CAP Strategic Plan, reflecting in part the

lower willingness of the Federal States (Bundesländer) to make financial commitments to reach the federal target.

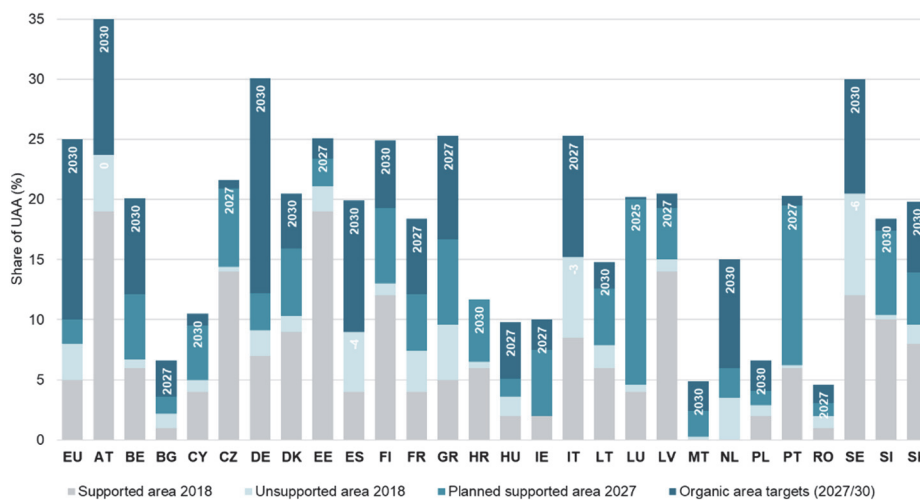


Figure 101: Organic farming shares of EU and Member State agricultural land area, including policy-supported and certified land in 2018 (actuals), land planned to be supported by 2027 and targeted to be certified organic by 2027 or 2030

Source: Lampkin et al. (2024) Deliverable 1.2 of the OrganicTargets4EU project

Values at top of light blue sections (Planned supported area 2027) for Austria (AT), Spain (ES), Italy (IT) and Sweden (SE) indicate that the planned supported area in 2027 is less than the certified area in 2018 by the % UAA amount shown. Acronyms of EU member states: AT = Austria, BE = Belgium, BG = Bulgaria, CY = Cyprus, CZ = Czechia, DE = Germany, DK = Denmark, EE = Estonia, EL = Greece, ES = Spain, FI = Finland, FR = France, HR = Croatia, HU = Hungary, IE = Ireland, IT = Italy, LT = Lithuania, LU = Luxembourg, LV = Latvia, MT = Malta, NL = Netherlands, PL = Poland, PT = Portugal, RO = Romania, SE = Sweden, SI = Slovenia, SK = Slovakia.

Overall, EU Member States have planned to double the land area supported from 5 percent of EU UAA in 2018 to 10% in 2027 (equivalent to 15 percent of UAA certified area if one third of the organic land remains unsupported as in 2018). On average, Member States also plan to double the expenditure on organic area support to more than 3.7 billion euros in 2027/8 compared with 1.8 billion euros in 2018. Average expenditure per hectare will increase by 5 percent. In total, more than 16 billion euros have been budgeted for organic farming area support in the five-year period 2023-2027, equivalent to 5 percent of total CAP expenditure and 20 percent of expenditure on environmental (Pillar 1 eco-schemes and Pillar 2 agri-environment) measures. These figures hide a wide degree of variation among Member States.

Organic Action Plans

In addition to the inclusion of organic support and targets in the CAP Strategic Plans, Member States have responded to the 2021 EU Organic Action Plan’s call for more national organic action plans (Figure 4). By 2024, all except three Member States (Greece, Spain and Lithuania) had national or regional organic action plans in place. Some countries like Denmark and Sweden have had multiple action plans since the 1980s, which have become progressively more focused on specific themes like public procurement. Others like Malta, Cyprus, Portugal and Romania have introduced action plans for the first time, in some cases encouraged by the European Commission during the CAP Strategic Plan negotiations.

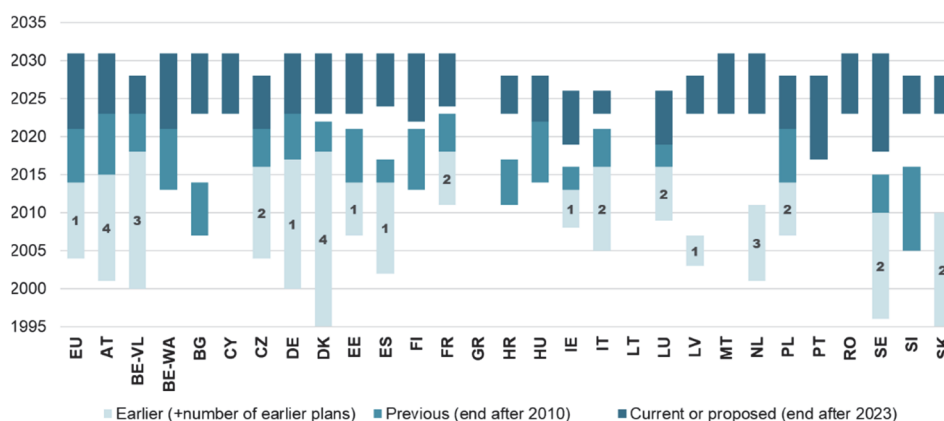


Figure 102: Periods (years) covered by current/planned (ending after 2023), previous (ending after 2010) and earlier organic action plans in EU Member States¹

Source: Lampkin et al. (2024) Deliverable 1.2 of the OrganicTargets4EU project. Note: Acronyms of EU member states: AT = Austria, BE-VL = Flanders, the northern region of Belgium, BE-WA = Wallonia, the southern region of Belgium. BG = Bulgaria, CY = Cyprus, CZ = Czechia, DE = Germany, DK = Denmark, EE = Estonia, EL = Greece, ES = Spain, FI = Finland, FR = France, HR = Croatia, HU = Hungary, IE = Ireland, IT = Italy, LT = Lithuania, LU = Luxembourg, LV = Latvia, MT = Malta, NL = Netherlands, PL = Poland, PT = Portugal, RO = Romania, SE = Sweden, SI = Slovenia, SK = Slovakia.

Organic action plans permit the integration of supply-push policies such as the area support payments with more demand-pull market- and information-focused policies. They can also support a balance between public good environmental and private sector economic outcomes. Many of the actions in the organic action plans are funded as sector or rural development measures, but without ring-fenced funding for organic support or statistical data to quantify outputs. This includes investment aids for production and processing, producer organisations, advice, training or EIP-AGRI² Operational

¹ For explanation of acronyms, see footnote for previous figure.

² EIP-AGRI is the European Union’s agricultural European Innovation Partnership. It works to foster competitive and sustainable farming and forestry. It contributes to ensuring a steady supply of food, feed

Groups¹. Others including public procurement, promotion and research are funded from other EU or national programmes.

Conclusions

The current national CAP strategic and organic action plans show a clear improvement in ambition compared to the previous supporting period in terms of land area supported, payment rates, or scope and number of action plans. However, they still fall short of what is needed to achieve the Farm-to-Fork Strategy targets. Reaching the 25 percent organic farmland goal by 2030 will require much more targeted action, including stronger policy support, robust market development and enhanced collaboration across sectors involved in organic farming. A system-wide approach is crucial, integrating policies that stimulate both supply and demand, supported by strong institutions, effective collaboration within the farming community, and secure market access. Reforms in agricultural knowledge and innovation systems (AKIS), alongside participatory research and innovative marketing strategies, are critical to mitigating risks for farmers and making organic farming more viable. Expanding cooperation with non-agricultural stakeholders, such as those in public health and civil society, can further reinforce public support and legitimacy for organic farming, embedding it as a central component of sustainable food systems.

These developments highlight the need for significant reforms and innovations to accelerate progress towards the Farm-to-Fork targets. The Horizon Europe project OrganicTargets4EU² is focused on determining the key areas and strategies required to implement these reforms effectively. The project explores different scenarios and facilitates a multi-stakeholder policy dialogue to help achieve the goal of 25 percent organically farmed land in the EU, with final results expected by 2026.

Acknowledgements

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and biomaterials, developing its work in harmony with the essential natural resources on which farming depends. More information is available at <https://ec.europa.eu/eip/agriculture/en/about.html>

¹ An EIP-AGRI Operational Group is a group of people with complementary knowledge (e.g. practical, scientific, technical, organisational expertise, etc.) who co-create practical solutions for agriculture, forestry and rural communities in an innovation project. For more information, see website of the EU CAP network at https://eu-cap-network.ec.europa.eu/operational-groups_en

² The project "OrganicTargets4EU - Transformation scenarios for boosting organic farming and organic aquaculture towards the Farm-to-Fork targets" runs from 2022 to 2026. More information is available at <https://cordis.europa.eu/project/id/101060368> and at <https://organictargets.eu>

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Enabling and Constraining Factors for Developing Organic Aquaculture in Europe

GIUSEPPE LEMBO¹ AND LOLA TOOMEY²

Aquaculture is the fastest-growing food-producing sector globally, contributing to 51 percent of the world's fisheries and aquaculture production in 2022, excluding algae (FAO, 2024). However, organic aquaculture remains a niche market, accounting for a production of 330,789 metric tons (Willer et al., 2024) in 2022, representing about the 2.8 percent of the global aquaculture production. The bulk of global organic aquaculture production is led by China, followed by European nations (Willer et al., 2024). In Europe, organic aquaculture represented solely 6.7 percent of total aquaculture production in 2020 (EUMOFA, 2022). According to the latest report from EUMOFA (EUMOFA, 2022), within the European Union (EU), mussel farming dominates organic aquaculture production with 41,936 metric tons, trailed by Atlantic salmon (*Salmo salar*; 12,870 metric tons), rainbow trout (*Oncorhynchus mykiss*; 4,590 metric tons), common carp (*Cyprinus carpio*; 3,562 metric tons), oyster (3,228 metric tons), and European seabass/gilthead seabream (*Dicentrarchus labrax* and *Sparus aurata*; 2,750 metric tons).

While European organic aquaculture production has seen a consistent rise in recent years, with a notable increase of 60 percent between 2015 and 2020 (EUMOFA, 2022), this growth trajectory is not sufficient to meet the objectives outlined in the European Union's Farm-to-Fork Strategy, which aims for at least 25 percent of agricultural land to be organic by 2030 and calls for a substantial increase in organic aquaculture. Despite the increasing consumption of organic aquaculture products, the European aquaculture sector has yet to fully realise its growth potential (Kaimakoudi, 2024). Since its inception, the organic aquaculture sector has encountered numerous challenges, including regulatory constraints related to quality, health, and environmental standards. Additionally, technical hurdles in production, such as adhering to organic regulations for reproduction and incurring extra feed costs, have posed obstacles. Reduced profitability, limited market demand, and competition with other certification schemes were also, for instance, reported to further impede the growth of European organic aquaculture.

Recently, in the framework of the OrganicTargets4EU project³ a quantitative systematic literature review was carried out to investigate the impact factors that act as either constraining or enabling factors for the development of European organic aquaculture. Special emphasis was placed on key farmed species in European organic aquaculture,

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³ More information about the OrganicTargets4EU project can be found on <https://organictargets.eu>. See also the article by Lampkin et al. in this volume.

encompassing both freshwater and marine species, namely Atlantic salmon, rainbow trout, common carp, European sea bass, gilthead seabream and shellfish.

The major constraining factor reported in the literature is the perceived feasibility of organic aquaculture among farmers, which encompasses practicality, viability, and ease of adopting and implementing organic aquaculture practices. Specific requirements often cited as limiting factors include the limited stocking densities (potentially requiring higher production capacity), restrictions on antimicrobial and chemical treatments (e.g., problematic for sea lice treatment in Atlantic salmon), and limitations on recirculating aquaculture systems.

The availability of organic juveniles also presents a significant challenge due to various factors, including limitations on live animal movements, risks associated with relying on a limited number of suppliers for eggs/juveniles, expenses and environmental impact (e.g., long-transport), and hesitancy to introduce new individuals into farms due to potential pathogen load or unsuitability for the local (geographical) environment (e.g. genetic or population, resistance to different diseases, growth performances, reproductive cycle, behavioural characteristics, etc.) (Gambelli et al., 2019a; Lembo et al., 2019; Sicuro, 2019).

Furthermore, constraints on organic feed formulation, such as bans on amino acid supplementation and on the use of genetically modified organism material (e.g., unavailability of vitamin B2 [riboflavin] to be included in the feed formulation for carnivorous species), can hinder the development of organic aquaculture (Lund et al., 2011; Mente et al., 2019). The limited options and higher cost of ingredients available to match amino acid and fatty acid profiles, and to adequately cover the dietary needs of essential nutrients, also present challenges for the feed industry in meeting organic regulation requirements (Mente et al., 2019). The small scale of organic production makes it more vulnerable to global/financial crises.

Despite these constraining factors, overall consumer attitudes toward organic aquaculture products are rather positive (Feucht and Zander, 2017; Gambelli et al., 2019b; Sicuro, 2019). It is reported that consumers are concerned about environmental issues, potential environmental benefits from specific rearing practices (i.e., environmental benefit and ecosystem services), as well as health concerns, which drive a trend towards a healthier diet (Jacobs et al., 2015b, 2015a), all of which are expected to increase demand for organic aquaculture products (Altintzoglou and Honkanen, 2020). The perceived impact of aquaculture practices on the natural environment is a key factor in the social acceptability of aquaculture products (Kraly et al., 2022; Cavallo et al., 2023). Another key factor lies in consumer preferences driven by ethical considerations, notably animal welfare (Honkanen and Ottar Olsen, 2009; Alexander et al., 2016; Cavallo et al., 2023). Moreover, the purchasing power/willingness to buy organic products has been mentioned in many documents as a supporting factor (e.g. Gambelli et al., 2019a). Enhanced public knowledge regarding the added value of organic products could encourage consumers to choose organic aquaculture products, despite their generally higher cost.

In conclusion, significant constraints hinder the development of organic aquaculture, including the applicability of regulations, production costs, challenges in provisioning organic inputs, and price differentials compared to conventional products. Incentives, such as eco-premiums, and research for innovative solutions are widely suggested to overcome these barriers. Moreover, tailored marketing strategies and effective communication channels are needed to inform consumers and increase demand. However, constraining and supporting factors are often interrelated, necessitating a holistic approach and strong effort from EU, Member State policymakers, farmers, and stakeholders to achieve the objectives outlined in the EU's farm-to-fork strategy for organic aquaculture.

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Latin America and the Caribbean



Latin America and Caribbean: Organic share of total agricultural land

More than 0%  More than 5%

Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Latin America and the Caribbean: Key Facts and Figures

JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER² AND MANUELA HELBING³

More than 10.3 million hectares of farmland in Latin America and the Caribbean were organic in 2023 – Argentina had the largest area

In Latin America and the Caribbean, more than 10.3 million hectares were managed organically in 2023. Almost 11 percent of the world's organic farmland was in Latin America and the Caribbean.

With more than 4.0 million hectares, Argentina had the largest farmland area under organic management, followed by Uruguay (more than 3.6 million hectares), Brazil (over 1.0 million hectares) and Chile (nearly 0.3 million hectares). More than 86 percent of Latin America and the Caribbean's organic farmland was in these four countries.

Uruguay is the country with the highest organic area share in Latin America and the Caribbean

Organic farmland in Latin America and the Caribbean constituted 1.6 percent of the total agricultural land of the region and was thus below the global organic area share of 2.1 percent in 2023.

The country with the highest organic area share was Uruguay, with a share of 25.4 percent, followed by French Guyana (13.0 percent) and Dominica (11.6 percent).

Latin America and the Caribbean lead global growth in organic farmland

In Latin America and the Caribbean, organic farmland experienced the largest increase of all regions, expanding by more than 1 million hectares (+10.8%) in the latest reporting year. This growth was primarily driven by Uruguay, which saw a significant increase of 831,287 hectares (+30.3%). Over the decade from 2014 to 2023, organic farmland in the region grew by 54%, a slower rate compared to the global growth of organic farmland.

Key crops grown are coffee, cocoa and cereals

Only 6.0 percent of organic farmland in Latin America and the Caribbean is used for arable crops (617'986 hectares). Among the key crops were cereals (182'461 hectares, mainly in Bolivia and Paraguay), sugarcane (74'286 hectares, mainly in Paraguay and Argentina) and oilseeds (68'819 hectares, mainly in Paraguay, Mexico and Argentina). Permanent crops accounted for approximately 8.3 percent of total organic land in Latin America and the Caribbean in 2023. Among the key crops were coffee (363'721

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hectares), mainly in Peru, Mexico and Honduras; cocoa (187'678 hectares), mainly in the Dominican Republic and Peru; and tropical and subtropical fruit (124'652 hectares), mainly in the Mexico, Ecuador, Dominican Republic, Ecuador and Peru.

Almost 73 percent of Latin America and Caribbean organic farmland is permanent grassland (7'586'327), and it is located mainly in Argentina, Uruguay and Chile¹. These three countries represent 99.5 percent of the total organic grassland/grazing areas in Latin America and the Caribbean.

Organic producers, processors and importers: Decrease of producers by more than 21'000 in 2023

There were more than 249'000 organic producers in Latin America and the Caribbean, with the highest number in Peru (93'167). Six percent of the world's organic producers were in Latin America and the Caribbean. Compared to 2022, there were 21'293 less (-7.9 percent down) organic producers, a total of 1'190 exporters and 20'700 processors.

Retail sales: Data almost non-existent in Latin America and in the Caribbean

Organic retail sales data for Latin America and the Caribbean are almost non-existent. However, this does not mean that there is no domestic market for organic products in Latin America. Many countries have developed local markets.

Nearly 56 percent of the EU and US imports are from Latin America and the Caribbean

Data on organic export volumes in metric tons to the European Union, which is a major market for Latin America and the Caribbean, has been available since 2018. Export data to the US has been available for even longer (since 2014); however, this data does not cover all products.

Data show that in 2023, more than 2.9 million metric tons of products were exported from Latin America and the Caribbean to the EU and US, constituting 55.8 percent of all organic exports to these countries/trade blocks. In the 6-year period between 2018 and 2023, Latin America and Caribbean exports increased by more than 33.4 percent, considerably faster than global organic exports to the EU and US, which grew by 17 percent in the same period.

Mexico is the largest exporter

The largest Latin American and Caribbean exporter was Mexico (almost 729'000 metric tons of products, mainly bananas, tomato, peppers, avocados and sugar), followed by Ecuador (more than 665'000 metric tons, of which 96 percent were banana) and Peru (nearly 303'000 metric tons, mainly bananas and coffee).

¹ Until 2022, land use details for Brazil were based on data provided by certifiers. However, from 2023 onwards, only the national source is used, which does not provide specific information on land use or crop details.

Bananas are the most important export product

With more than 1'198'933 metric tons and almost 41 percent of the Latin American and Caribbean organic exports, bananas are the most important product group, followed by sugar (417'138 metric tons), vegetables (311'484 metric tons, mainly tomatoes, bell peppers and cucumbers) and coffee (184'754 metric tons).

For more information about the Latin American and the Caribbean, see figures following pages and data tables for the region from page 323.

Organic Agriculture in Latin America and the Caribbean: Graphs

Latin America and Caribbean: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025

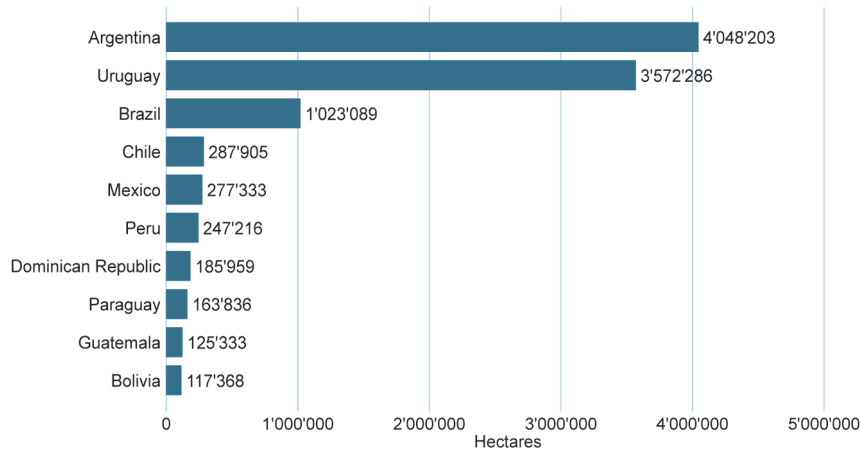


Figure I03: Latin America and the Caribbean: The ten countries with the largest organic agricultural area 2023

Source: CIAO-FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025

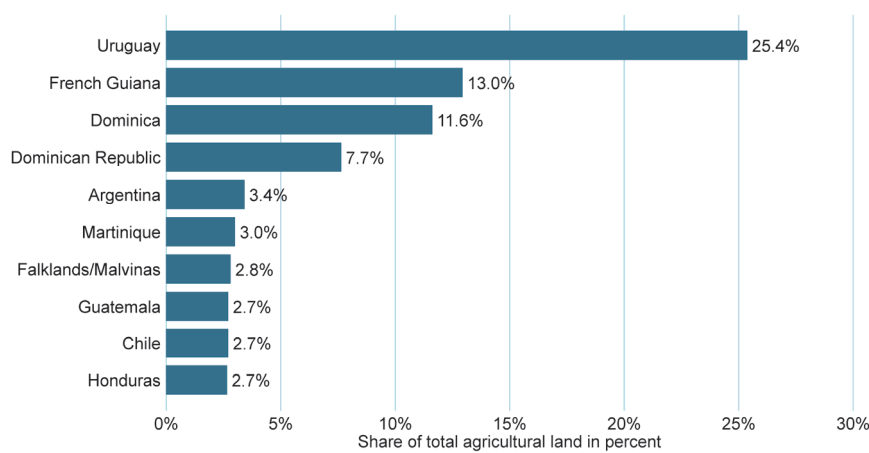


Figure I04: Latin America and the Caribbean: Highest organic area shares 2023

Source: CIAO-FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Latin America and Caribbean: Development of organic agricultural land 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

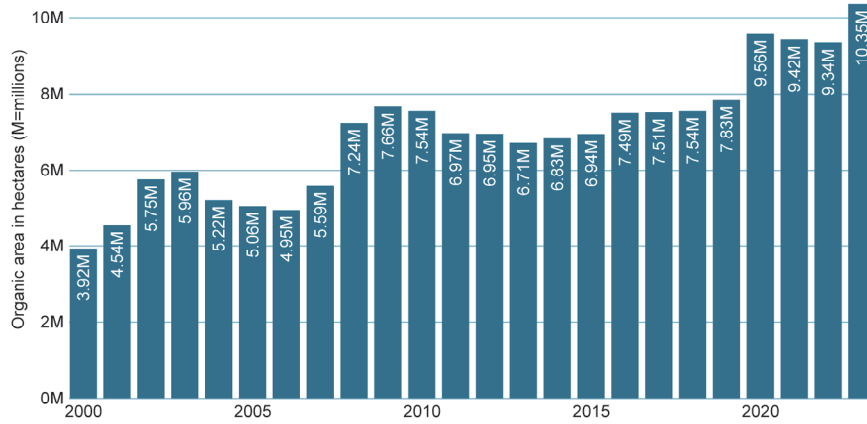


Figure 105: Latin America and the Caribbean: Development of organic agricultural land 2000-2023

Source: CIAO-FiBL-IFOAM-SOEL-surveys 2001-2025

Latin America and Caribbean: Use of organic agricultural land 2023

Source: FiBL survey 2025

Land use types

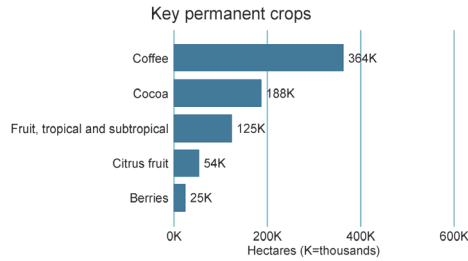
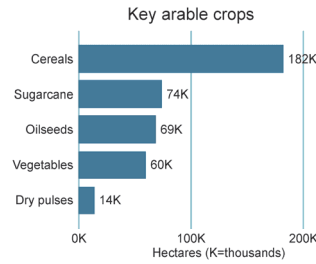
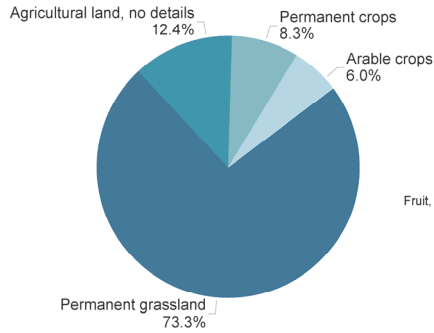


Figure 106: Latin America and the Caribbean: Use of organic agricultural land 2023

Source: CIAO-FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Latin America: Key commodities exported to the EU and US in 2023

Source: Traces/European Commission and GATS/USDA

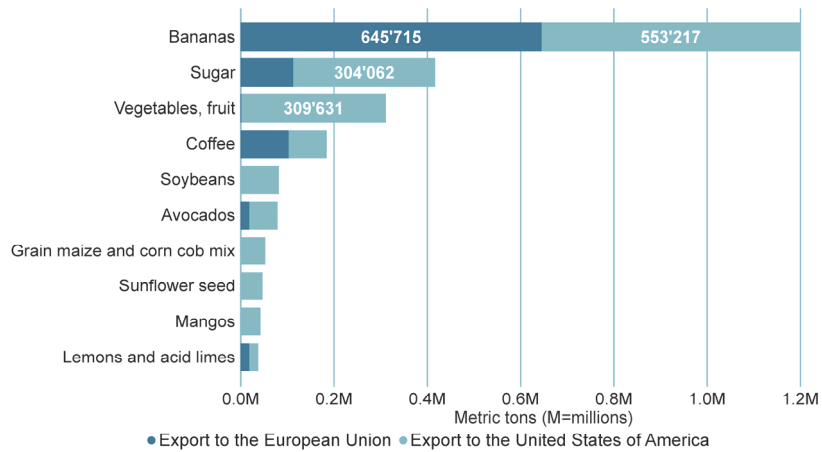


Figure 107: Latin America and the Caribbean: Key commodity groups exported to the EU and US (export volume in MT)

Source: GATS/USDA and TRACES/European Commission. For detailed data sources, see annex, page 333.

Latin America: Key EU and US export countries in 2023

Source: Traces/European Commission and GATS/USDA

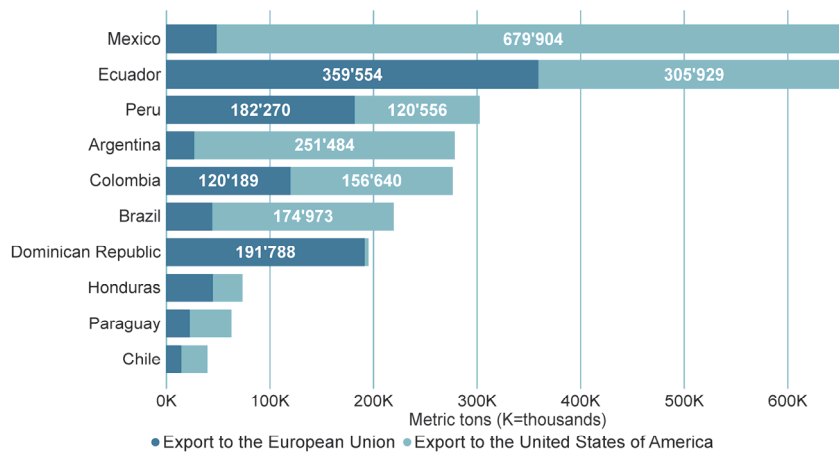


Figure 108: Latin America and the Caribbean: Key countries exporting to the EU and US (export volume in MT)

Source: GATS/USDA and TRACES/European Commission. For detailed data sources, see annex, page 333.

North America



Northern America: Organic share of total agricultural land

More than 0%  More than 2%

Map 6: Organic agricultural land in Canada and the United States 2023

Source: Canada Organic Trade Association (COTA) and United States Department of Agriculture (USDA). For detailed data sources, see annex, page 333.

U.S. Organic Sector 2024: Challenges and Opportunities

MAGGIE MCNEIL¹

The American organic sector saw an eventful 2024. A historic presidential election, inflation pressures on consumers and businesses, and the implementation of sweeping new organic regulations led the list of developments impacting organic.

Organic policy outlook

This is a challenging and critical time for U.S. organic policy priorities. The political landscape has been significantly altered with a new President, a new Congress, a new Secretary of Agriculture and new appointments for several key positions that impact organic. Finding the best course to chart these new waters, navigate the currently stalled Farm Bill, and move forward in this changed environment to continue advocating for organic will be paramount.

How will the new Trump administration approach the organic sector the second time around? How will a Republican-controlled Congress develop a Farm Bill that will still need bipartisan support to pass?

One of the developments in the election was Trump's embrace of Robert F. Kennedy Jr.'s "Make America Healthy Again" (MAHA) agenda. In the immediate weeks post-election it appeared as if Kennedy would have strong influence over policy at Health and Human Services – where he has been nominated to lead - as well as the Department of Agriculture. However, Kennedy's influence over the USDA would not appear to be as strong as he promoted in the media. His top choices for the Secretary role, names aligned with his MAHA perspective, did not receive the nomination, and instead a past national policy advisor, Brooke Rollins, was picked. It would appear that she will lead a much more traditional agency than a Kennedy influenced Secretary would have.

A look at some specific issues and the potential impact on organic:

- **Regulatory policy.** In the first Trump administration, there was an executive order of "two for one" – that any new regulation would first require that two existing regulations be rescinded. Organic, a voluntary regulation, was lumped in with all others, and key regulatory renovations such as the Organic Livestock and Poultry Standards were held up. The Trump team is expected to revive its anti-regulatory strategy.

¹ Maggie McNeil, Media Relations Director, Organic Trade Association, 444 N Capitol St NW, Washington, DC 20001, United States of America, <https://ota.com/>

- **Fraudulent imports and Pro-Domestic Agenda.** The new administration and Congress could be responsive to concerns of fraud in organic imports, and it would not be surprising for the United States Department of Agriculture (USDA) to be given stronger direction in assessing and addressing these concerns. There also may be an opportunity for U.S. organic operations to advocate for policies that improve domestic competitiveness with foreign producers. Mitigating fraud is one leg of that table, but would also require invests in domestic production and processing. While a Republican controlled Congress may be hesitant to expand funding for organic in the Farm Bill, a Trump USDA could see this as a feather in the cap for improving U.S. farm economy.
- **Tariffs.** Tariffs are on the mind of many in organic given the importance of imports, especially of organic feedstuffs. While tariffs could improve opportunities for domestic producers of organic, a sudden spike in tariffs on imported soy and corn would likely also result in spikes in prices for dairy, broilers, and eggs. Higher prices for consumers have been a challenge for organic growth, and if the administration enacts tariffs resulting in higher retail prices, organic could be impacted.
- **Immigration.** Farm and agribusiness labor may be strained by the new administration's expected tougher immigration policies. Already many produce farmers and dairy producers lack adequate farm labor, as do food processors such as meat producers. This has worsened in the last eight years as both parties have failed to enact a functional migrant labor policy. If Trump does deport migrants, it will both be farmworkers and food processing sector workers, and this too could lead to increases in costs of production and higher prices at retail.
- **What about the Farm Bill?** Chances for passage of a new Farm Bill before the incoming Congress has passed, and another extension of the 2018 Farm Bill is being debated in Congress as of the first week of December, 2024. The extension will likely be tied to a disaster relief package, and the so-called orphan programs that impact organic, from conservation programs to funding of data initiatives at USDA's National Organic Program (NOP), will likely be covered.

Organic has lost some important champions on Capitol Hill. Incoming lawmakers need to be educated about the many benefits of organic, and of the need to provide the support necessary for organic to expand.

Organic stakeholders have important messages to stress with members of Congress and policy makers – the fact that organic is a system of voluntary regulations giving consumers, farmers and businesses the option to choose; that organic is good for rural and semi-rural communities; that the organic tent is inclusive and comprised of many farms and businesses that produce both organic and non-organic products; and that organic conserves and improves natural resources, thereby strengthening our nation's

food security and creating farms more resilient to environmental shocks and economic disruptions.

It is often said that elections have consequences. All the consequences of this historic election cannot be predicted. But elections also provide opportunities, and, for the organic community, the opportunity to engage with lawmakers and policy makers and advocate for organic has never been greater.

Organic sales post a new record even as inflation pressures consumers

U.S. sales of certified organic products approached 70 billion U.S. dollars (approx. 65 billion euros)¹ in 2023, a new record for the sector. Sales for the American organic marketplace hit 69.7 billion U.S. dollars, up 3.4 percent, according to the Organic Trade Association's (OTA) 2024 Organic Industry Survey.

Despite stubborn price inflation seen throughout retail aisles, consumers remained clear-eyed about their priorities in the products they chose for themselves and their families, valuing health and sustainability, and seeking out the USDA Organic label. The organic marketplace recalibrated its supply chain and reconciled the cost of doing business in part with increased retail pricing. The industry continued to grow, with organic food sales in 2023 totaling 63.8 billion U.S. dollars and sales of organic non-food products totaling 5.9 billion U.S. dollars.

"It is encouraging to see that organic is growing at basically the same rate as the total market. In the face of inflation and considering organic is already seen as a premium category, the current growth shows that consumers continue to choose organic amidst economic challenges and price increases. Although organic is now a maturing sector in the marketplace, we still have plenty of room to grow," says Tom Chapman, co-CEO of the Organic Trade Association.

In 2023, the increase in dollar sales in the organic market was driven more by pricing than unit sales. That said, consumers did boost their purchases of many organic products. Increases in unit sales were reported for up to 40 percent of the products tracked in the survey. The survey also showed that prices for many non-organic products climbed at a faster rate than organic products. This means the price gap between conventional and organic is closing, which should help fuel growth for organic products in 2024.

Produce held its spot as the largest organic category in 2023, continuing to be the primary entry point for consumers into the organic market. In 2023, the category grew by 2.6 percent to 20.5 billion U.S. dollars. Organic produce now accounts for more than 15 percent of total U.S. fruit and vegetable sales. The second biggest-selling food category in the organic aisles was the grocery category with sales of 15.4 billion U.S. dollars for a 4.1 percent growth. This new category represents many of the products previously grouped under breads and grains, condiments, and packaged and prepared

¹ In 2023, 1 US dollar corresponded to 0.92 euros, according to the Central European Bank.

foods. Beverages were the third largest category for organic in 2023, posting 9.4 billion U.S. dollars in sales, up 3.9 percent.

Consumers know and trust the Organic seal

The Organic Trade Association partnered with Euromonitor International in a survey of around 1,200 consumers across the country to evaluate what today's consumers understand about organic, as well as their willingness to pay for USDA Organic¹ products and the individual attributes supported by organic certification.

The survey found that American consumers recognize the USDA Organic seal more than any other certification in the marketplace. Compared to a dozen claims and certifications that can be found on various products in today's grocery aisles, almost 90 percent of consumers are familiar with organic claims. That deep familiarity with organic carries over into a solid public trust. The USDA Organic seal is trusted by 70 percent of consumers – the most trusted of any agricultural label, and the second-most trusted food label existing, second only to the American Heart Association's iconic checkmark.

The Millennial and Gen Z generations are today's biggest organic buyers in the United States. Millennials, individuals from 28 to 43 years old in 2024, have been leading the organic charge for close to a decade. Now the young adults of Gen Z (ages 12 to 27) also are making their presence known in the organic market. Millennials and Gen Z pay more attention to labels than older generations, with over 70 percent of those age groups reporting that the USDA Organic seal matters and is an important consideration when choosing their food.

Organic products often command a price premium over non-organic due to a variety of factors. Today's price-conscious shopper considers organic to be the food claim that most justifies a higher price. When asked in the survey about the value of various claims, organic was ranked the most valuable, with nearly 60 percent of consumers saying that the organic claim warrants higher prices. The OTA survey found that the more consumers know about organic, the more willing they are to pay the higher costs.

Sweeping new updates in organic regulations

The Strengthening Organic Enforcement (SOE) rule, the largest update to the USDA National Organic Program (NOP) organic regulations since its inception, came fully into effect March 19, 2024. The rule implements sweeping new changes aimed at preventing fraud and improving transparency and traceability in the organic market. Two of the most significant updates are the reduction of exemptions to organic certification, including the requirement for certification of all exporters and importers,

¹ The organic seal of the United States Department of Agriculture (USDA) is an official mark protected by federal regulation and overseen by the National Organic Program (NOP), a program in the USDA Agricultural Marketing Service (AMS). Certified farms and businesses are authorized to use the seal to identify their products as organic. More information about the seal can be found at <https://www.ams.usda.gov/rules-regulations/organic/organic-seal>

and the requirement for NOP electronic import certificates for all organic products brought into the United States.

With new changes comes new challenges. Organic certification agencies saw a rush of applications for certification from companies previously not required to be certified. As certifiers worked to complete these late applications, USDA exercised regulatory discretion and permitted the continued flow of imports, provided the goods entering the U.S. market were verified to be organic. This regulatory discretion ended September 19, 2024, operations are completing the certification process, and certifiers appear to be meeting demand.

Certification coverage has been critical, and Customs Brokers and U.S. Customs and Border Protection (CBP) are actively stopping uncertified product. A new “reconditioning” code is being applied by Customs Brokers to noncompliant incoming products, which is then shared with NOP for further follow up. Additionally, with the USDA organic seal now protected by a trademark, fraudulent packaged product can be stopped at the border. In response to a memo issued by NOP, certifiers are strengthening their systems and increasing oversight of commodities coming from regions deemed high risk.

Stronger organic animal welfare standards

On October 25, 2023, the USDA National Organic Program announced the Organic Livestock and Poultry Standards (OLPS) Final Rule to strengthen organic animal welfare standards. The OLPS rule clarifies the production standards of avian and mammalian livestock as authorized by the Organic Foods Production Act to support consistent enforcement across producers. The rule became effective January 2, 2024, with compliance for most requirements effective January 2, 2025. Currently certified poultry operations and those certified prior to January 2, 2023, have four additional years to comply with certain outdoor spacing requirements, stocking density requirements and exit area requirements. All operations will need to be in full compliance with all provisions by January 2, 2029.

U.S. organic active in the global market

Global demand for U.S. organic continues to grow as American exporters introduce new products annually to consumers overseas, and the USDA increases federal assistance funding for U.S. organic exporters. The USDA’s Global Agricultural Trade System reports over 693 million U.S. dollars in U.S. organic exports in 2023, a value based on 38 tracked export codes skewed toward fresh products and excluding key exported commodities, especially finished, packaged products. Canada and Mexico remain the primary export destinations for U.S. organic products by a wide margin, followed by South Korea, Taiwan, and Japan. The United Kingdom recently returned to the top 10 with a 127 percent increase in exports from 2022 to 2023 as trade stabilized post-Brexit. Despite 2023’s success, the growing international market for organic trade has faced several recent challenges that have impacted U.S. exporters, specifically inflation and the increased cost of living that many countries face.

Through a combination of USDA's Regional Agricultural Promotion Program (RAPP) and Market Access Program (MAP), U.S. organic exporters received another year of record funding, with over 3.5 million U.S. dollars awarded to the Organic Trade Association in 2024 to promote organic products globally. The 2.5 million U.S. dollar RAPP award reflects an increase in federal support for the expansion of U.S. organic products globally. In 2024, OTA attended nine international and domestic events with 36 U.S. organic exporters. Though funding for 2025 is dependent on the passing of the Farm Bill, OTA is optimistic of continued federal support for U.S. organic exporters to strengthen existing markets and develop new market opportunities within Asia, Latin America, and Africa.

USDA makes funds available to advance and aid organic

The USDA awarded a total of 85 million U.S. dollars in grants in 2024 to fund 107 projects across the country to advance organic through its new Organic Market Development Grant (OMDG) program. The Organic Market Development Grant Program is a key element of USDA's Organic Transition Initiative, a historic 300 USD million initiative launched in 2022, to help existing organic farmers and those transitioning to organic production and processing. The program awards innovative and diverse projects that expand organic opportunities for farmers, national and regional food systems, help grow organic markets and boost consumer awareness for organic.

The USDA also made available in the fall 58 million U.S. dollars in assistance funds through its Organic Dairy Marketing Assistance Program (ODMAP) to U.S. organic dairies who are dealing with sharply increased operating and marketing costs, and organic commodities in short supply. ODMAP was developed to help mitigate market volatility, higher input and transportation costs and unstable feed supply and prices that have created unique hardships in the organic dairy industry.

Canada

TIA LOFTSGARD¹

Canada's organic marketplace continues to thrive as the fifth largest for global consumer demand, but 2023 brought its share of challenges. Certified organic operators dropped by 2 percent, with 144 leaving the sector, bringing the total to 7,558 by year's end.

Production also saw shifts: certified livestock operations fell by 11 percent to 694, and certified growers decreased by 2 percent to 5,965. The organic area was 3.17 million acres (about 1.3 million hectares).

While pastureland and natural areas contracted, reflecting the decline in livestock operations, maple production soared. These dynamic shifts underscore the resilience and evolving nature of Canada's organic sector.

Continued strong demand for organics

Canada's organic sector, including non-regulated products like textiles and pet food, reached a value of 9.01 billion Canadian dollars (or 6.2 billion euros) in 2023. Leveraging new retailer scan data for greater precision, the Canada Organic Trade Association reported that organic food and beverage sales alone hit 7.176 billion Canadian dollars (4.9 billion euros) — a 10.1 percent rise since 2020. Non-food segments grew even faster, climbing by 14 percent.

Organic grocery sales captured 3.4 percent of the market in 2023, up from 3.1 percent in 2022. Produce remains the gateway to organics, commanding a 5.3 percent share of total produce sales, while packaged and prepared organic goods gained traction with 3.4 percent, fueled by demand for convenience and special diets. Organic meat, however, held a modest 0.5 percent share.

Canadians continue to embrace organics across all sectors, from farming and manufacturing to research and retail. A 2023 survey by Agriculture and Agri-Food Canada found that 59.3 percent of consumers are willing to pay more for organic products, with 34.9 percent frequently purchasing them. Trust in organic labels has also grown, with 33.7 percent of consumers expressing confidence in 2023, up from 27.6 percent in 2019. The organic, industry remains a symbol of environmental stewardship, health-conscious living, and support for local farmers.

¹ Tia Loftsgard, Executive Director, Canada Organic Trade Association, Ottawa, Canada, <https://canada-organic.ca>

Canada's Growing Role in the Global Organic Market

Canada's organic exports surged to 684.6 million Canadian dollars in 2023 (469.1 million euros), a significant leap from 557 million Canadian dollars in 2022. Imports also remained strong, exceeding 871 million Canadian dollars (597 million euros).

Quebec led the export charge, contributing over 47 percent of Canada's organic export value, with maple syrup stealing the spotlight. In 2023, maple syrup exports soared by 131.9 percent, making up 34.9 percent of total organic exports and marking a banner year for this iconic product.

On the import side, Ontario accounted for nearly 45 percent of organic imports, followed by British Columbia at 27 percent. These provinces serve as key entry points for unroasted coffee and bananas, the top organic imports by both volume and value.

Navigating Policy: Ensuring Compliance and Advocacy

The Canadian Organic Trade Association (COTA) oversees the Technical Committee for Organic Equivalency Arrangements, where we focused on several key initiatives this year. Notable achievements included the successful revision of the organic equivalency arrangement with Japan to incorporate alcoholic beverages and the signing of a new Canada-South Korea equivalency arrangement in October 2023. Additionally, we engaged in the Canada-European Union equivalency standards assessment and participated in consultations aimed at transitioning our current arrangement into a trade agreement. Our involvement also included attending the Canada-EU Agriculture Dialogue Sessions in Brussels. Furthermore, the Canada-Mexico equivalency arrangement was extended for several more years in February 2024.

In response to the USDA's new organic import requirements as part of the National Organic Program's Strengthening Organic Enforcement Rule, Canada served as the pilot project to ensure smooth functioning of the new requirements for Import Certificates. The NOP's new requirements caused a lot of confusion despite many discussions with NOP asking for clarifications on who would need to be certified along the supply chain. Canada facilitated meetings with the USDA's National Organic Program, Agricultural Marketing Services and Foreign Agricultural Services to facilitate the transition, learning that Canadians selling to unregistered operators would need to become NOP-Certified in Canada as the importer of record to maintain their sales to the USA. The US-Canada Organic Equivalency arrangement (USCOEA) will be reviewed in 2025 to address the evolving landscape of organic trade, the differences between the Canadian and USA standards and review the inclusion of third countries in the USCOEA.

Organic Agriculture in North America: Key Facts and Figures

JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER² AND MANUELA HELBING³

North America had more than 3.3 million hectares of organic farmland in 2023

In North America, more than 3.3 million hectares were managed organically in 2023. Over 3.4 percent of the world's organic farmland was in North America.

With only two countries reporting organic farmland in North America, the US had the largest farmland area under organic management (2'060'741 hectares, followed by Canada (1'288'514 hectares).

In North America, organic farmland decreased by almost 300'000 hectares

In North America, organic land witnessed a 7.7 percent decrease, equivalent to a decrease of 278'563 hectares from 2022 to 2023. While the United States did not provide an update for organic farmland in 2023, Canada saw a decrease of 278'563 hectares. Over the period from 2014 to 2023, organic farmland in North America grew by 3.4 percent.

North America: Organic farmland share is at almost 1 percent

Organic farmland in North America constituted 0.7 percent of the region's total agricultural land, which was below the global organic area share of 2.1 percent in 2023. The US reported a share of 0.5 percent, while Canada had 2.3 percent of its farmland as organic.

Key crops grown are cereals, industrial crops and oilseeds

More than 48 percent of the organic farmland in North America was used for arable crops (1'623'433 hectares). Among the key crops were cereals (691'660 hectares), industrial crops (193'066 hectares) and oilseeds (171'654 hectares).

Permanent crops accounted for approximately 8 percent of total organic land in North America in 2023. Among the key crops were berries (19'986 hectares), temperate fruit (18'992 hectares) and grapes (18'453 hectares).

Nearly 24'200 farmers

There were nearly 24'200 organic producers in North America. A total of 17'445 producers were counted in the US and 6'751 in Canada.

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Manuela Helbing, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Nearly 64 billion euros in retail sales

Organic retail sales for North America reached 63.9 billion euros in 2023. The USA, which is the largest single market in the world (followed by the European Union), reported retail sales (food) of 59.0 billion euros, whereas Canada had 4.9 billion euros.

Organic exports – continuing strong growth

US organic import and export data has been available since 2014, whereas data on organic export volumes in metric tons to the European Union has been available since 2018.

Data show that in 2023 over 303'905 metric tons of products were exported from North America to the EU and US/Canada, constituting 5.8 percent of all organic exports to these countries or trade blocks. In the 6-year period from 2018 to 2023, North American exports increased by almost 140 percent, growing considerably faster than global organic exports to the EU and US, which grew by only 17 percent in the same period.

Canada exports mainly to the US

The larger North American exporter was Canada, with more than 291'802 metric tons of products, mainly maize, wheat, oats and potatoes. Canada exported more than 269'000 metric tons to the US and more than 22'000 metric tons to the EU. US exports to the EU reached more than 12'000 MT.

Cereals are the most important export product

With more than 127'000 metric tons and almost 42 percent of the North American organic exports, cereals (mainly maize, oats and wheat) were the most important product group, followed by fresh vegetables (45'540 metric tons, mainly cucumbers, tomatoes, and bell peppers) and root crops (33'417 metric tons, mainly potatoes).

For more information about the North American figures, see figures and data tables, on the following pages.

For detailed data on organic agriculture in North America, please refer to the tables provided in the Annex, page 328.

Organic Agriculture in North America: Graphs

Northern America: Organic agricultural area 2023

Source: COTA and USDA, 2024

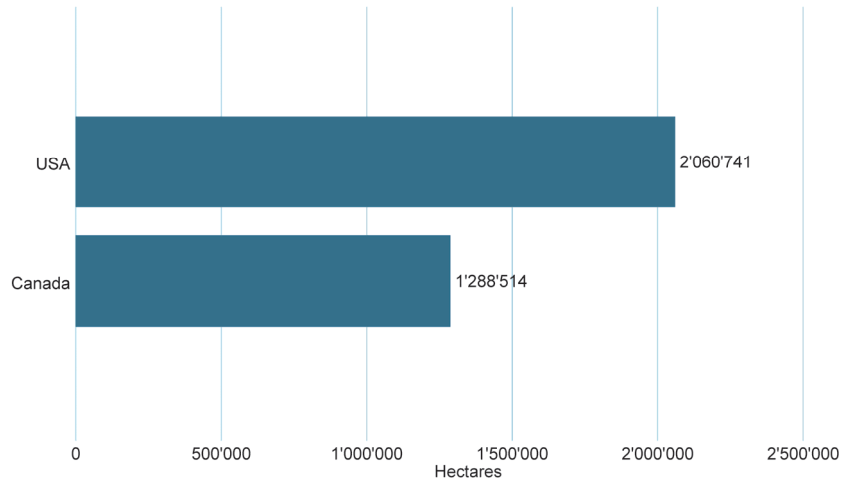


Figure 109: North America: The ten countries with the largest organic agricultural area 2023

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Northern America: Organic share of total agricultural land 2023

Source: COTA and USDA, 2024

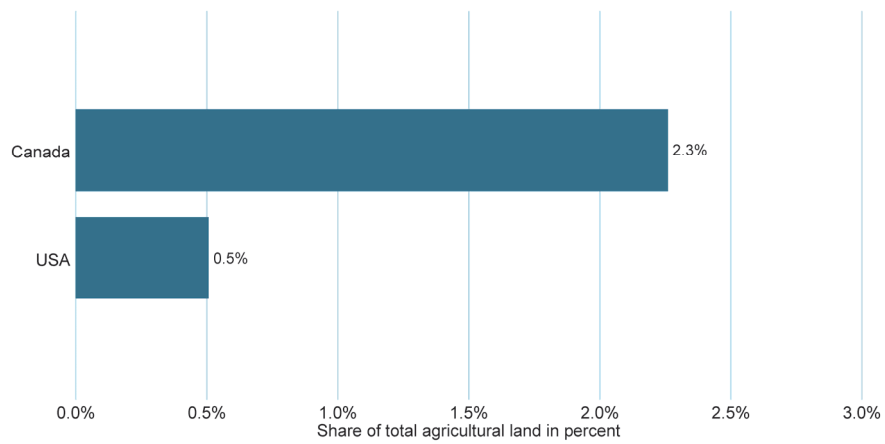


Figure 110: North America: The countries with the highest organic share of total agricultural land 2023

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Northern America: Development of organic agricultural land 2000 - 2023

Source: COTA and USDA, 2024

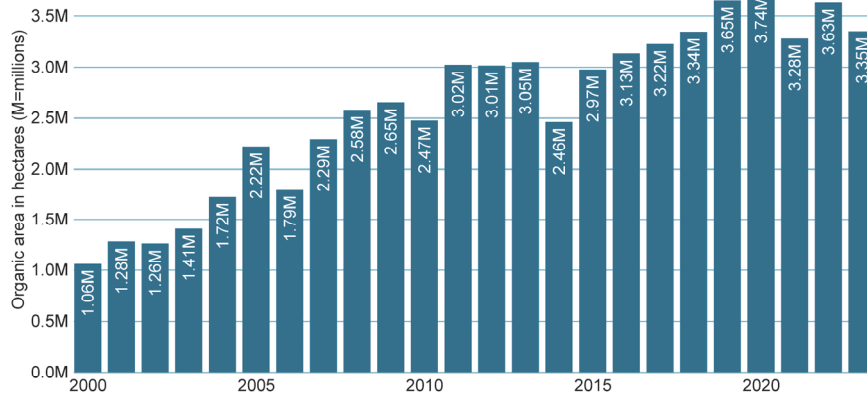


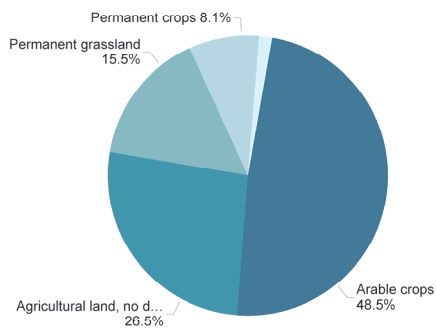
Figure 111: North America: Development of organic agricultural land 2000-2023

Source: FiBL-IFOAM-SOEL-surveys 2001-2025 based on national data sources

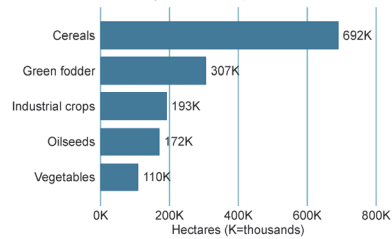
North America: Use of organic agricultural land 2023

Source: FiBL survey 2025

Land use types



Key arable crops



Key permanent crops

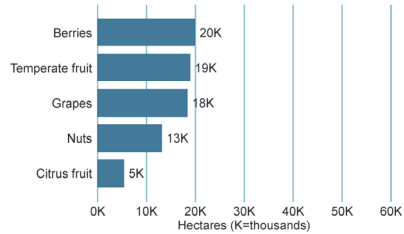


Figure 112: Northern America: Use of organic agricultural land 2023

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Northern America: Key commodities exported to the EU and US in 2023

Source: Traces/European Commission and GATS/USDA

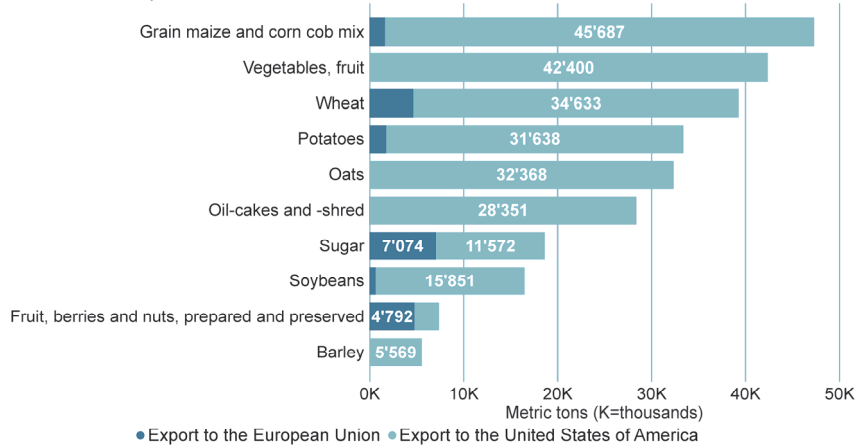


Figure 113: Northern America: Key commodity exported to the EU and US (export volume in MT)

Source: GATS/USDA and TRACES/European Commission. For detailed data sources, see annex, page 333.

Northern America: Key EU and US export countries in 2023

Source: Traces/European Commission and GATS/USDA

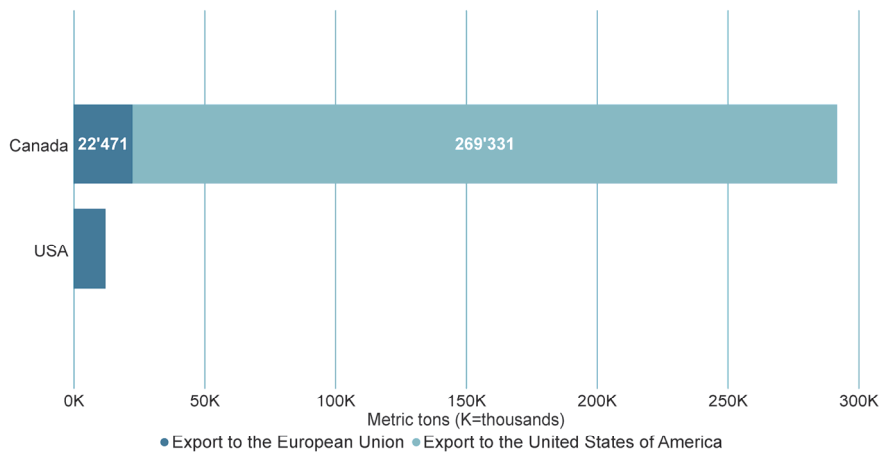


Figure 114: Northern America: Key countries exporting to the EU and US (export volume in MT)

Source: GATS/USDA and TRACES/European Commission. For detailed data sources, see annex, page 333.

Oceania



Oceania: Organic share of total agricultural land

More than 0%  More than 10%

Map 7: Organic agricultural land in the countries of Oceania 2023

Source: FiBL survey 2025, based on information from the private sector, certifiers and governments.

Organic Industry Developments in Australia

KANE FRAMPTON¹

2024 saw a number of positive developments for Australia's organic industry, despite a challenging national economic landscape that impacted operators and consumers alike. The rising cost of living was a popular topic in political discourse, with many organic consumers reporting that they were unable to dedicate as much of their weekly budget as they would like to organic products.

As has been outlined in previous editions of this book, Australia's organic industry is notable in that there is no single definition for the term "organic" in the domestic market. This lack of domestic regulation has been a long-term challenge for the sector, with Australia now the only OECD member nation to not have an organic domestic regulatory framework in place.

In real terms, this means that products can be labelled and sold as organic in Australia even if they contain as little as one organic ingredient, leaving it to consumers to check for certifications logos to ensure the label claims can be trusted. Despite the lack of regulation, many organic operators in Australia choose to get their organic credentials certified in accordance with strict standards as a means to support truth in labelling.

The flow-on effects of this regulatory absence are significant, with concerns growing around greenwashing, consumer trust and export market access. The market access piece is perhaps the most significant for certified organic operators, given that several of Australia's trade partners effectively do not recognise our current organic program, resulting in significant red tape for those looking to sell Australian organic products overseas.

Establishing a mandatory certification standard for organics – a recent timeline

While the majority of operators support the introduction of a practical standard for the domestic market, the concept has not yet made its way into federal law. The most recent push to enact a mandatory standard was struck down in March 2023 by the federal government, which cited that the benefits of implementing a regulatory standard would not match the cost.²

This decision was met with frustration by industry, given that analysis of the potential benefits did not consider what regulation would do for the organic export market. Concerns were also raised around the risk of eroding industry credibility at a time when

¹ Kane Frampton, Communications Officer, Australian Organic Limited, Nundah, Australia, www.austorganic.com

² Watt, M (2023): Cost of organics regulation outweighs benefits. Minister for Agriculture, Fisheries and Forestry, available online at <https://minister.agriculture.gov.au/Watt/media-releases/cost-of-organics-regulation-outweighs-benefits>

the sector was well-placed for positive growth. Key organisations from across the organic industry came together in the weeks and months following the March 2023 decision, with regular efforts made to lobby bipartisan support for a regulatory framework that would support the future growth of the industry.

These industry bodies formed a singular “voice” for the sector known as the Organic Development Group (ODG) in an effort to ensure consistency of messaging in lobbying efforts. Initiatives such as organic BBQs on the lawns of Australian Parliament House in 2023 and 2024 helped to drive home our industry’s message, allowing certified organic operators to rub shoulders with parliamentarians and explain how the current absence of regulation has allowed unscrupulous operators to partake in greenwashing. On this subject, the organic industry was represented at a public hearing of the Senate Inquiry into Greenwashing during May 2024, with certified organic operators sharing their experiences on this matter.¹ At the hearing, stakeholders spoke about how unsubstantiated “organic” claims can jeopardise the efforts of producers who have gone through the costly and rigorous third-party organic certification process in an effort to prove their authenticity to consumers.

On 19 November 2024, the National Organic Standard Bill 2024 was read into the Senate, proposing a much-needed solution for the sector.² The Bill was introduced as a Private Senators’ Bill by the Liberal-National Coalition, the opposing party to Australia’s current Labor government. The proposal seeks to establish the Government-owned National Standard for Organic and Bio-dynamic Produce as the mandatory domestic certification standard for all businesses selling organic products in Australia. The National Standard is currently the mandatory export standard for businesses exporting organic products, with this proposal looking to make it law for the domestic market too.

If the Bill is made into law, Australia’s competition watchdog (the Australian Competition and Consumer Commission) will have clear guidelines to ensure that consumers are getting what they pay for when shopping organic. In its current format, the National Organic Standard Bill 2024 includes certification exemptions for small businesses where the annual turnover of organic produce doesn’t exceed 25,000 Australian dollars.

As of this writing, the Bill has been referred to a Senate Inquiry with public submissions welcomed to help decision-makers fully understand the scope of the proposal. Twenty-one submissions have been received as of 20 December 2024, with the large majority supporting a fit-for-purpose regulatory framework that defines organics. The Bill is currently expected to be debated by the Senate in February 2025, although the imminent scheduling of a federal election may alter timelines.

¹ Australian Organic Limited (2024): Severe ramifications required in greenwashing crackdown. Australian Organic Website. Available online at <https://austorganic.com/severe-ramifications-required-in-greenwashing-crackdown>

² Parliament of Australia (2024): National Organic Standard Bill 2024. Available online at https://www.aph.gov.au/Parliamentary_Business/Bills_Legislation/Bills_Search_Results/Result?bId=s1434

Unlocking Australia's potential as an organic export nation

As stated earlier, the lack of regulation at present is a clear hindrance to the growth of Australia's organic export market. With Australia looking to improve its export outcomes across broader agriculture, the organic industry has been earmarked for its growth potential in Southeast Asia, which offers a rapidly growing market for premium organic products driven by middle-class growth and health-conscious consumers.

This was demonstrated in report recommendations following the House of Representatives Standing Committee on Agriculture's Inquiry into the role of Australian agriculture in Southeast Asian Markets. The Inquiry report, entitled "Trading North" was published in late November 2024 and included the following key recommendations specific to the organic sector.¹

- **Regulatory Improvements:** The inquiry highlights the need for harmonisation between Australian and international organic standards and regulatory oversight.
- **Enhanced Resources:** Expansion of the Manual of Importing Country Requirements (MICOR) and Austrade platforms to offer detailed guidance tailored to organic exporters.
- **Targeted Financial Support:** Organic-specific grants to enable operators to enter Southeast Asian markets effectively.
- **Targeted Ongoing Budgetary Support:** Funding in future budgets to improve resources available for the organic industry.
- **Trade Support and Market Entry Assistance:** Appointment of a dedicated organic trade officer to guide operators through complex South East Asian market requirements.

This unprecedented show of support is positive news for Australian organic exporters looking to access the Southeast Asia region. It also affirms the general position of our industry that more needs to be done across the board to support market access opportunities for certified organic operators looking to reach new export destinations.

Expansive land under organic certification highlights room for growth

While Australia is a world leader when it comes to land under certified organic management, the Australian organic industry only accounts for approximately 1.3 per cent of global organic sales. This disparity highlights how much room for improvement there is to expand the sector, both in local and export markets.

There are presently five organic approved Certification Bodies (CBs) in Australia; ACO Certification Limited (ACO), Bio-Dynamic Research Institute (BDRI), NASAA Certified Organic (NCO), Organic Food Chain (OFC) and Southern Cross Certified Australia

¹ Parliament of Australia (2024) 'Trading North – Report – November 2024', available online at https://www.aph.gov.au/Parliamentary_Business/Committees/House/Agriculture/AgricultureandSEAsia/Report

(SXC). These CBs are in the process of providing updated data for the total land area under certified organic management, with the collated figures to be provided shortly. The most recent calculation of Australia's total land under certified organic management in 2022 yielded a total of 53 million hectares, which accounts for roughly more than 50 per cent of all organic land globally.

Where to next?

The introduction of the National Organic Standard Bill 2024 into the Senate has sparked renewed energy and engagement around the organic proposition. While there will be a transition period if the Bill is successful, consumers will reap immediate benefits as Australia positions itself as a nation that takes organic claims seriously and supports those who operate with integrity.

A priority for the industry in 2025 will be improved data collection, with key organic organisations set to work together to ensure the scope and growth potential of our sector are accurately captured. Qualitative and quantitative data is essential to supporting organic businesses with their efforts to make high-quality and affordable certified organic products more accessible across the nation.

1

¹ Kane Frampton, Marketing Coordinator, Australian Organic Limited, Nundah, Australia, www.austorganic.com

The Pacific Islands

KAREN MAPUSUA¹

Recent developments

Pacific Governments are continuing to take action to create a supportive policy environment, the demand for certification continues, and regional and national agencies and development partners continue to recognise the value of organic agriculture as a development tool for the Pacific Islands context.

The Government of French Polynesia utilised the Tool for Agroecological Performance Evaluation (TAPE) to undertake their agriculture census in 2023, which has provided a valuable data set that captures and differentiates organic from conventional farms on a wide range of production, ecological and social indicators. The census report² includes, for the first time, data on soil fertility management and crop protection, which provides critical data for Government planning. It is the first time globally that this tool is being used at a national or territorial scale.

The role of women in agriculture and the organic sector has been a growing focus, with the regional peak body for organic agriculture forming a women's chapter with the aim to elevate women's roles, leadership, participation, and contributions to the organic and ethical trade movement. POETCom has also developed a valuable toolkit to strengthen women's engagement in organic value chains.³

A constraint to 3rd party organic certification is the cost, which is made even more expensive by the need to fly in auditors from neighbouring countries such as Australia. POETCom, with support from EU funding, has trained 49 Pacific Islanders as Organic Auditors, including support of their field training from certifiers. A Certification Assessment Tool has also been developed to assist farmers and processors in identifying the best certification options, and a Plan for the Sustainable Implementation of Market Certification in the Pacific has been developed aiming to enhance MSME⁴ access to certification and its impact, thereby bolstering the regional organic movement and its integrity.

Market, trade and certification

As most of the organically certified products from the Pacific are for export, the pandemic reoriented some producers towards the local market, giving impetus to the trend of previous years of growing local markets through basket (box) schemes,

¹ Karen Mapusua, President of IFOAM - Organics International, Bonn, Germany and Director Land Resources Division, Pacific Community (SPC), Suva, Fiji

² French Polynesia Agricultural census report (French language): https://www.service-public.pf/dag/wp-content/uploads/sites/28/2024/07/RGA_Premiers_resultats_6cc0f93990.pdf

³ POETCom gender and organic value chain toolkit: <https://www.organicpasifika.net/poetcom/training-resources/gender-and-organic-value-chain-analysis/>

⁴ MSME generally refers to Micro, Small, and Medium Enterprises.

unverified organic claims on labels, PGS development, organic stalls at farmers markets, and increased awareness. Organised value chains for retail and hospitality sectors are still underdeveloped.

The following is a summary table listing the main products that are currently 3rd party organically certified in the Pacific:

Table 34: Pacific islands: Main products currently 3rd party organically certified

Country	Crops
Cook Islands	Noni Juice
Fiji	Noni capsules, noni fried fruit, noni fruit frozen, noni fruit oil, noni fruit powder, noni juice, noni leaf dried, noni leaf oil, noni leaf powder, noni seed oil, coconut meal, virgin coconut oil, cassava, citrus, cocoa beans, coconut, fresh ginger, fresh turmeric, frozen ginger, frozen turmeric, lemon grass, noni, passion fruit, taro, vanilla bean
French Polynesia	Pineapple juice, pineapple wine, coconut milk and extra virgin coconut oil / second pressing oil, sugar cane, noni juice, tamanu oil, tiaré flower
New Caledonia	Sandalwood, tropical fruits, citrus fruits, leafy vegetables, bulb vegetables, fruit/pod vegetables, root & tuber vegetables, stem vegetables, legumes, aromatic and medicinal plants, ornamental plants, and forest products.
Papua New Guinea	Vanilla, coconut soap lavender, coconut soap lemongrass, coconut soap patchouli, coconut soap pure unscented, virgin coconut oil, coffee beans, cocoa, tea
Samoa	Noni, coconut
Solomon Islands	Coconut, cocoa
Vanuatu	Copra meals, coconut oil, sandalwood, tamanu

There remains no mechanism for collecting local organic market data but growth can be inferred from the growth in PGS-certified farms and the number of organic value chains and market opportunities. The countries are investigating the possibility of collecting agricultural data supported by artificial intelligence as is currently utilised in the fisheries sector. If successful it could benefit gathering this information for the organic sector.

PGS models in the Pacific include wild harvest, “whole island”, and more traditional grower groups. Respect for traditional authorities (chiefs) is strong in the Pacific Islands, and in some cases, traditional governance systems have been embraced to support the guarantee system. Processing and value-adding operations are also certified through the PGS process, and this has created a need to provide considerable upskilling to those PGS, who include processing, to manage the more complex inspection requirements.

In 2023 there were 16 PGS, involving over 2000 growers, approved to use the Organic Pasifika Mark with six additional PGS under development. The number and variety of PGS-certified products on local markets and for export is expanding, and 2023 saw the range grow to include more value-added products such as teas and infusions, nut butter and pesto. The growth of PGS and improved recognition of the value of organics has also contributed to a rise in farmers’ markets and supply agreements. Samoa, Niue,

and Cook Islands now have certified produce sold through farmers' markets. The Solomon Islands also now has a small store selling local PGS organic products.

Legislation

New Caledonia and French Polynesia remain the only Territories to have regulated organics. Independent countries of the region have not yet passed organic regulations. The Government of Vanuatu has endorsed its first national organic policy, and the Government of Palau is incorporating a draft organic policy into the broader productive sector policy framework. Fiji's draft policy is pending its first reading in Cabinet.

Government and international (development) support

The Pacific Community, as a regional intergovernmental organisation, continues to provide support for organics development and houses the POETCom secretariat. POETCom remains predominantly funded through development projects.

The growing interest of development partners in organics as a solution for climate reliance and livelihood development is demonstrated through the Pacific Organic Learning Farms Network, funded through the multi-donor Kiwa Initiative. The Kiwa Initiative aims to build resilience to climate change through Nature-based Solutions. A network of Organic Learning Farms (OLFs) that become learning centres for best organic and agroecological production methods will be established and developed to foster knowledge sharing, planting materials and skills. Organic learning farms have been established in Fiji, Nauru, Solomon Islands and Tonga. Around these central locations, clusters of farmers are linked to the Organic Learning Farms and are transitioning to organic and agroecological production. Twenty-six clusters have been established, working with 280 farmers and covering approximately 412 hectares. The Organic Learning Farms will significantly expand the amount of land sustainably managed, with increased biodiversity on each island. It is implemented in partnership with the Pacific Community (SPC), Pacific Organic & Ethical Trade Community (POETCom)

Another example is the PROTÉGÉ project in the Pacific French Territories, funded by the European Union. PROTÉGÉ stands for the "Projet régional océanien des territoires pour la gestion durable des écosystèmes" (Pacific Territories Regional Project for Sustainable Ecosystem Management) and has the objective to strengthen sustainability, climate change adaptation and enhance ecosystem services by protecting water resources and biodiversity. Agroecology and organic agriculture form the basis of the agriculture component of the programme.

Outlook

Opportunities for scaling organics as a response to climate change are growing with development partners more interested in funding programmes of this nature. Climate finance mechanisms such as the Green Climate Fund are currently considering proposals aligned with organic regenerative production systems for the Pacific Islands.

There is an expectation that the local market for organic products will continue to expand as tourism and hospitality industries look towards organic and sustainability as part of the Pacific Islands brand. The focus on non-communicable diseases in the Pacific and campaigns promoting local and traditional diets

Links/Further reading

- ›Pacific Organic and Ethical Trade Community www.organicpasifika.net
- ›Pacific Organic Policy Toolkit www.organicpasifika.net/pasifikapolicytoolkit/
- ›POETCom Strategic Plan www.organicpasifika.net/poetcom/about-us/our-strategy/
- ›Pacific Organic Standard www.organicpasifika.net/poetcom/membership/pacific-organic-standard/
- ›

Organic Agriculture in Oceania: Key Facts and Figures

JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER² AND MANUAL HELBING³

More than 53 million hectares of farmland were organic in Oceania in 2023 – Australia had the largest area worldwide

In Oceania, over 53 million hectares of farmland were managed organically in 2023. Nearly 54 percent of the world's organic farmland was in Oceania.

With more than 53'016'058 hectares, the country that had the largest area of farmland under organic management in 2023 was Australia, followed by New Zealand (over 79'000 hectares), Samoa (over 41'000 hectares) and Fiji (nearly 13'000 hectares). More than 99.6 percent of Oceania's organic farmland was in Australia.

Samoa is the country with the highest organic area share in Oceania

Organic farmland in Oceania constituted 14.1 percent of the total agricultural land of the region, which was high above the global share (2.1 percent) in 2023.

The country with the highest organic area share was Samoa (14.60 percent), which was followed by Australia (14.58 percent) and French Polynesia (9.3 percent).

Oceania's organic farmland with no significant changes

Oceania's organic farmland decreased by 10'123 hectares, or by 0.02 percent, from 2022 to 2023, mainly because update for Australia's organic farmland was not received in 2023. From 2014 to 2023, Oceania's organic farmland grew by 132 percent and thus at a much faster rate than global organic farmland, mainly due to major increases in Australia.

The key crops grown are cereals, coconuts and grapes

Nearly 99 percent (nearly 52'541'000 hectares) of organic farmland in Oceania is permanent grassland or grazing land, mainly in Australia. Not much information is available on the use of arable land and permanent cropland.

Only a small fraction of the organic farmland (51'472 hectares) is for arable crops. The key arable crop group in 2023 was cereals (41'293 hectares). Permanent crops accounted for approximately 0.1 percent of the total organic farmland in Oceania. Among the key crops were coconuts (8'151 hectares), grapes (5'783 hectares) and cocoa (3'485 hectares).

Organic producers, processors and importers: 15'575 producers managing more than 53 million hectares

There were nearly 16'000 organic producers in Oceania, with the highest numbers in Papua New Guinea (10'203), followed by Samoa (1'857) and Australia (1'635). Only 0.4

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Manuela Helbing, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

percent of the world's organic producers were in Oceania. Compared to 2022, 8'891 less (36 percent decrease) organic producers were counted, mainly due to a decrease of producers reported from Papua New Guinea (-8'781). A total of 126 exporters and 1'746 processors were counted.

Retail sales: Data available for Australia and New Zealand

Total organic retail sales in Australia and New Zealand exceeded 1.51 billion euros in 2022. Organic market updates for 2023 were not available. In 2022, per capita consumption of organic food products in the two countries reached nearly 49 euros per person.

Organic exports – over 44'000 metric tons

Data on organic export volumes in metric tons to the European Union has been available since 2018, and data on exports to the US has been available since 2014. Data show that in 2023 over 44'000 metric tons of products were exported from Oceania to the EU and US, constituting 0.8 percent of all organic exports to these countries/trade blocks. In the 6-year period from 2018 to 2023, exports from Oceania increased by almost 53 percent, considerably faster than global organic exports to the EU and US, which grew by only 17 percent in the same period.

New Zealand is the largest exporter

The largest exporter in Oceania was New Zealand (more than 41'000 metric tons of products – nearly 38 percent apples and almost 36 percent wine), followed by Papua New Guinea (over 2'000 metric tons, mainly coffee) and Australia (983 metric tons, mainly wine). Please note that Australia is a major exporter of organic meat to the United States. However, U.S. import statistics currently only account for plant-based products.

Apples and wine are the most important export product

Comprising more than 15'570 metric tons and more than one-third of the organic exports from Oceania, temperate fruits (exclusively apples) were the most important product group, followed by beverages (15'484 metric tons, exclusively), cereals (5'648 metric tons, mainly wheat) and kiwis (4'853 metric tons).

For more information see figures on the following pages and the data tables from page 330.

Organic Agriculture in Oceania: Graphs

Oceania: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025

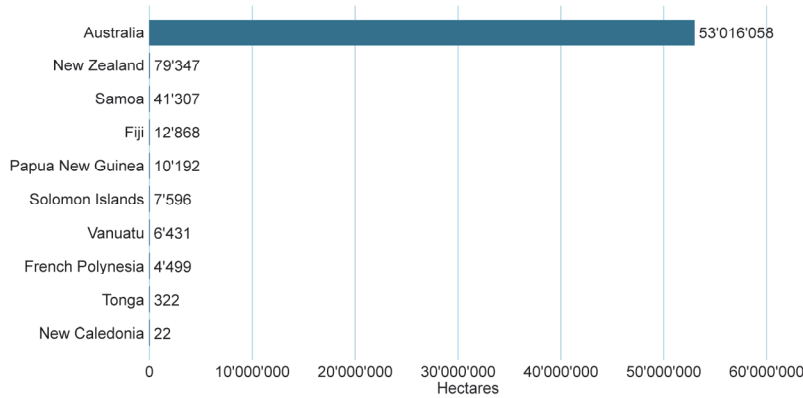


Figure 115: Oceania: The ten countries with the largest organic agricultural area 2023

Source: POETCom-FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Oceania: The ten countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025

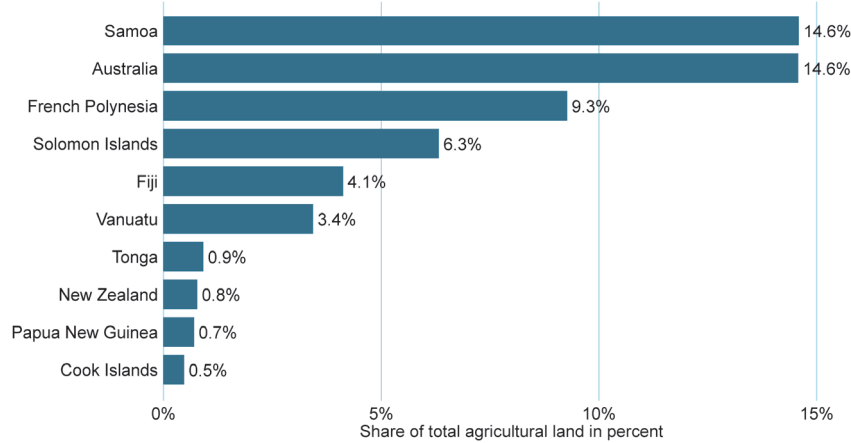


Figure 116: Oceania: The countries with the highest organic share of total agricultural land 2023

Source: POETCom-FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Oceania: Development of organic agricultural land 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

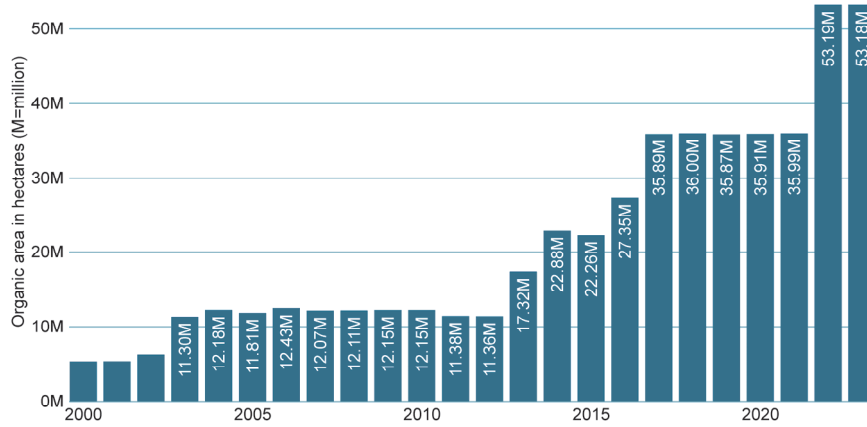


Figure 117: Oceania: Development of organic agricultural land 2000-2023

Source: POETCom-FiBL-IFOAM-SOEL-surveys 2001-2025

Oceania: Use of organic agricultural land 2023

Source: FiBL survey 2025

Land use types

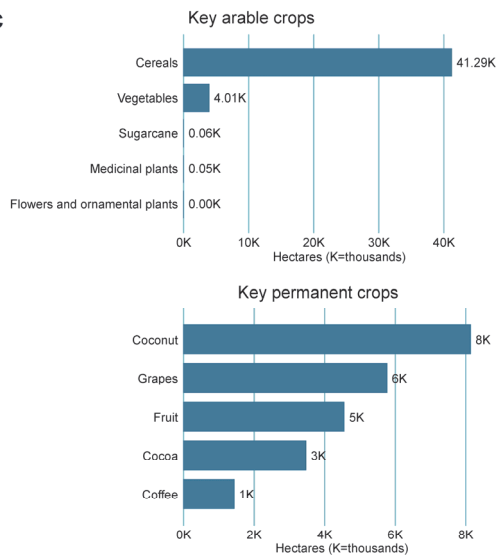
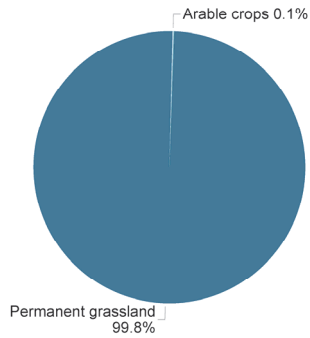


Figure 118: Oceania: Use of organic agricultural land 2023

Source: POETCom-FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Oceania: Key commodities exported to the EU and US in 2023

Source: Traces/European Commission and GATS/USDA

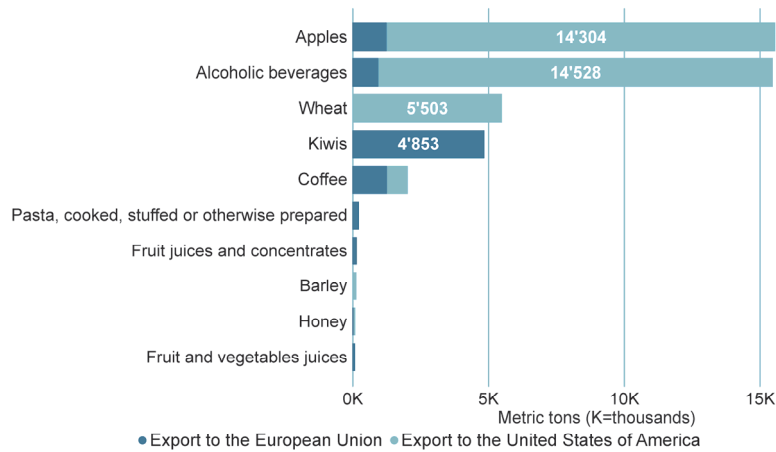


Figure 119: Oceania: Key commodity groups exported to the EU and US

Source: GATS/USDA and TRACES/European Commission. For detailed data sources, see annex, page 333.

Oceania: Key EU and US export countries in 2023

Source: Traces/European Commission and GATS/USDA

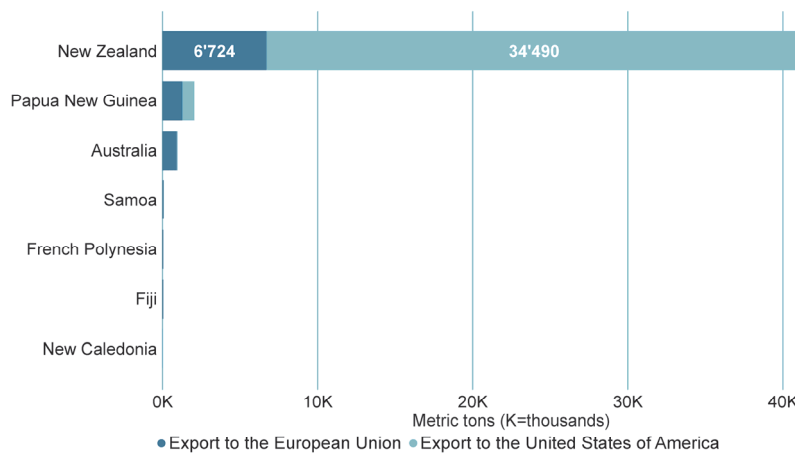


Figure 120: Oceania: Key countries exporting to the EU and US

Source: GATS/USDA and TRACES/European Commission. For detailed data sources, see annex, page 333.

Outlook

Organics: Beating the odds

RAVI R. PRASAD¹

Despite growing threats to the ecosystem and political apathy towards tackling climate change and desertification threatening food security, as evident in the disappointing outcomes of the three Conference of Parties held in 2024, organics continued to demonstrate resilient growth. This increase demonstrates that the organic movement is a part of the solution to realising the ambitions of restricting temperature rise, conserving biodiversity, securing the livelihood of millions of farmers across the globe, and ensuring the supply of healthy food.

As you will read in this edition of *The World of Organic Agriculture*, there was a 2.6 per cent increase in the area under organic cultivation, with the biggest growth seen in Africa, where the organic farmland registered an uptick of 24.2 percent. With this expansion, Africa now has more area under organic cultivation than North America. Also, in Latin America, there was an over 10 per cent boost in the area under organic agriculture.

Over the years, retail sales have also registered a steady growth, and last year was no exception, as has been encapsulated in the chapter on the global market for organic food and drink.

Beating all odds, the increase in cultivation and market growth gives us hope. However, the underlying message is clear: we need to adopt a multipronged approach to promote organics, which is grounded in human rights and is at the nexus of climate change, health, and nutrition. On the one hand, we must empower farmers and provide them with the tools and tactics to adopt organic agriculture, and, on the other, engage with like-minded movements that are promoting solutions to address climate change and improve health and nutrition.

In 2024, we commenced implementing the 10-year strategy, which was developed through consultations with the membership in the previous year, aimed at stimulating the adoption of regenerative organic food and farming. Achieving these objectives requires time, resources and concerted efforts. We need collective action to engender change by influencing knowledge, and the attitude and practices of farmers, consumers and policymakers.

Along with our members and through innovative programmes, IFOAM – Organics International has initiated efforts to deliver on the three key objectives of the Strategy, namely, empowering organics worldwide, leading the organic movement globally, and building a sustainable future for IFOAM – Organics International.

The 21st Organic World Congress and the General Assembly in Taiwan in December last year brought together nearly 500 members and many more from the larger organic

¹ Ravi R. Prasad, Executive Director, IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio

community. At the Organic World Congress, where the organic community had the opportunity to meet in-person for the first time after the Covid-19 pandemic, the feeling of camaraderie was profoundly evident. During the four plenaries and over 50 sessions, members engaged in energetic discussions and had the opportunity to exchange knowledge and lessons learned. At the General Assembly, members elected a new World Board with the mandate to reform the governance of the network.

Throughout 2024, IFOAM – Organics International engaged in advocacy at the global level to influence policies. We joined the FAO's Global Family Farming Forum, the Intercontinental Network of Organic Farmers (INOFO) championed agroecological solutions at the FAFO2024 summit,¹ and we joined our members in North America in a court case in which a US district court ruled in favour of group certification, a vital mechanism for empowering small-scale organic producers. In all these efforts, our regional bodies, sector platforms and members played a key role.

We continued our endeavour to build the capacity of members by implementing projects in Asia and Africa. The Knowledge Centres for Organic Agriculture and Agroecology (KCOA) supported by Germany's GIZ, and the Agroecology Promotion Programme, funded by the Swiss Development Cooperation, have provided us the opportunity to launch our flagship Organic Leadership Course delivered by our IFOAM Global Academy, and conduct policy labs to empower members and young organic leaders to influence policies at the national level in Africa. The Himalayan Agroecology Initiative, a joint initiative of IFOAM – Organics International and the World Future Council focussing on Bhutan, India and Nepal, brings together diverse stakeholders, including policymakers, to develop multifaceted policy responses to challenges in the region.

As we continue to strengthen the organic movement worldwide, IFOAM – Organics International will continue to strive for positioning organics at the centre of the global narrative on climate change, health, nutrition and human rights. Our efforts in the coming years will continue to focus on leading the organic movement and empowering organics worldwide through enhanced stakeholder engagement. We will seek new opportunities, partnerships and alliances to expand and serve the movement, and increase our global impact.

¹ FAFO is the Farmers' Forum. Over February 12 – 13, 2024, the World Farmers' Organisation (WFO), as an active member of the International Fund for Agricultural Development (IFAD, <https://www.ifad.org/en>) and FAFO Steering Committee since 2016, brought a significant delegation to the Eighth Global Meeting of the Farmers' Forum (FAFO) at IFAD headquarters in Rome (<https://www.ifad.org/en/w/events/the-eighth-global-meeting-of-the-farmers-forum>).

Annex

In the annex, we present data tables showing a breakdown of data by country. You can find the respective statistics chapters, including figures, in the following parts of the book:

- Area, page 34
- Operators, page 41
- International trade, page 45
- Retail sales, page 48
- Land use and crops, page 53
- Africa, page 140
- Asia, page 157
- Europe, page Table 72
- Latin America, page 226
- North America, page 242
- Oceania, page 256

Annex I: Tables

I Global data

I.1 Key indicators at a glance¹

Table 35: Key indicators by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Afghanistan	28	0.0001%			1
Albania	736	0.1%	150		1'273
Algeria	3'350	0.008%	6		1'986
Andorra	2	0.01%			
Argentina	4'048'203	3.4%	1'368		278'667
Armenia	466	0.03%	22		132
Australia	53'016'058	14.6%	1'635	1'338	983
Austria	701'161	27.3%	26'251	2'657	1'231
Azerbaijan	11'483	0.2%	4		1'463
Bahamas	49	0.4%			
Bahrain	1	0.01%	1		
Bangladesh	1'400	0.01%			44
Belarus	5'387	0.1%	33		167
Belgium	102'359	7.5%	2'638	1'153	
Belize	440	0.2%	385		44
Benin	60'275	1.5%	5'895		10'859
Bhutan	3'704	0.7%	2'760	0	
Bolivia (Plurinational State of)	117'368	0.3%	12'517		19'062
Bosnia and Herzegovina	2'495	0.1%	90		6'935
Brazil	1'023'089	0.4%	24'853	778	219'767
British Virgin Islands	26	0.4%			
Bulgaria	147'798	2.9%	4'438	38	8'647
Burkina Faso	286'167	2.2%	35'625		18'076
Burundi	1'751	0.1%	669		115
Cambodia	35'543	0.6%	7'710		10'317
Cameroon	2'831	0.03%	14		305
Canada	1'288'514	2.3%	6'751	4'917	291'802
Chad		0.0%	2'960		416
Channel Islands	180	2.1%			
Chile	287'905	2.7%	994		39'900
China	3'420'457	0.7%	15'676	12'648	206'321
Colombia	29'322	0.1%	38		276'829
Comoros	262	0.2%	1		13
Congo, Republic of	5'708	0.1%	2		11
Cook Islands	9	0.5%	16		
Costa Rica	10'962	0.6%	2'626		28'548
Côte d'Ivoire	104'228	0.4%	4'803		38'170

¹ The table on key indicators includes the combined exports to the European Union and the United States in metric tons (MT). Please note that for the U.S., not all exports are covered, only select products. Please also bear in mind that there are further export destinations, so the data shown here is not complete. For the countries of the European Union, only the exports to the US are listed. There are no data on intra-EU trade. See also chapter in this book on EU organic imports (page 221).

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Croatia	119'873	8.0%	6'274	99	22
Cuba	4'936	0.1%	9		2'236
Cyprus	10'470	7.7%	1'515		4
Czech Republic	595'190	16.9%	5'347	274	
Democratic Republic of the Congo	108'297	0.3%	118'203		12'020
Denmark	303'430	11.6%	3'960	2'159	0
Dominica	2'907	11.6%	258		17
Dominican Republic	185'959	7.7%	16'840		195'377
Ecuador	72'601	1.3%	9'589		665'483
Egypt	116'000	2.9%	984		35'570
El Salvador	1'959	0.2%	371		489
Estonia	225'256	22.9%	1'968	111	
Eswatini	2'878	0.2%			
Ethiopia	438'745	1.1%	121'552		46'074
Falkland Islands (Malvinas)	31'937	2.8%	3		
Faroe Islands	251		1		
Fiji	12'868	4.1%	16		64
Finland	311'498	13.7%	4'236	352	
France	2'767'447	9.6%	61'167	12'081	2'162
French Guiana (France)	4'213	13.0%	108		
French Polynesia	4'499	9.3%	74		65
Georgia	5'871	0.2%	659		761
Germany	1'888'999	11.3%	36'680	16'080	980
Ghana	125'469	1.0%	914		69'261
Greece	924'853	17.6%	58'691	60	1'964
Grenada	176	2.2%	2		8
Guadeloupe (France)	1'309	2.6%	247		
Guatemala	125'333	2.7%	149		11'685
Guinea		0.0%			27
Guinea-Bissau		0.0%			584
Guyana		0.0%			430
Haiti	3'233	0.2%	3'434		327
Honduras	95'436	2.7%	15'876		73'703
Hong Kong		0.0%			264
Hungary	320'251	6.4%	5'983	30	1
Iceland	6'440	0.3%	30		
India	4'475'837	2.5%	2'358'267	374	157'982
Indonesia	71'947	0.1%	23'346		13'490
Iran (Islamic Republic of)	15'412	0.03%	327		1'436
Iraq	63	0.001%			
Ireland	178'653	4.0%	4'076	165	
Israel	5'091	0.8%	336		13'110
Italy	2'455'586	18.7%	84'191	3'882	25'319
Jamaica	17	0.004%	4		13
Japan	18'837	0.4%	3'945	1'623	4'006
Jordan	1'463	0.1%	19		116
Kazakhstan	191'283	0.1%	27		25'918
Kenya	173'120	0.6%	63'230	3	15'607
Kosovo	505	0.1%	44		438
Kuwait	33	0.02%	1		
Kyrgyzstan	19'114	0.2%	1'003		929
Lao People's Democratic Republic	27'025	1.3%	1'619		11'047
Latvia	297'111	15.1%	3'379	51	
Lebanon	1'398	0.2%	49		77
Lesotho	0	0.0%	2		705

Annex > Global data > Key Indicators

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Liberia	7'247	0.4%	2		25
Liechtenstein	1'612	44.6%	40		
Lithuania	249'122	8.5%	2'596	51	2
Luxembourg	8'262	6.3%	161	151	
Madagascar	170'279	0.4%	62'024		6'190
Malawi	20'734	0.3%	2		
Malaysia	1'386	0.02%	35		34
Maldives		0.0%			223
Mali	21'276	0.05%	12'419		3'827
Malta	66	0.6%	25		
Martinique (France)	945	3.0%	142		
Mauritius	13	0.01%	9		46
Mayotte	170	0.8%	47		
Mexico	277'333	0.3%	49'940		728'632
Moldova	41'480	1.8%	141		12'204
Mongolia	957	0.001%	180	1	
Montenegro	4'272	1.7%	483		25
Morocco	13'325	0.04%	449		17'033
Mozambique	16'804	0.04%	69		6'315
Myanmar	7'118	0.1%	65		27
Namibia	659	0.002%	3		114
Nepal	16'974	0.4%	133		304
Netherlands	87'416	4.8%	2'110	1'615	5'429
New Caledonia	22	0.01%			0
New Zealand	79'347	0.8%	685	172	41'215
Nicaragua	30'880	0.6%	8'792		12'759
Niger	705	0.002%	1		400
Nigeria	157'019	0.2%	1'151		17'591
North Macedonia	8'322	0.7%	888		264
Norway	46'063	4.7%	3'913	389	
Oman	7	0.0005%	1		0
Pakistan	107'400	0.3%	944		55'767
Palestine	5'162	1.3%	1'478		623
Panama	5'333	0.2%	50		294
Papua New Guinea	10'192	0.7%	10'203		2'062
Paraguay	163'836	1.0%	7'285		63'061
Peru	247'216	1.0%	93'167		302'826
Philippines	187'425	1.5%	14'402		16'403
Poland	636'021	4.4%	22'354	310	41
Portugal	860'878	21.7%	16'028	21	1'218
Republic of Korea	37'825	2.4%	24'072	485	120
Réunion (France)	2'397	5.0%	539		
Romania	693'998	5.1%	12'598	41	25'691
Russian Federation	96'576	0.04%	48	183	86'143
Rwanda	5'421	0.3%	9		834
Saint Lucia	57	0.6%	1		
Samoa	41'307	14.6%	1'857		82
Sao Tome and Principe	9'281	22.1%	4		6'082
Saudi Arabia	23'410	0.01%	540	325	305
Senegal	3'385	0.04%	2		2'035
Serbia	29'002	0.8%	525		17'077
Seychelles		0.0%	1		10
Sierra Leone	214'930	5.4%	5'518		14'816
Singapore	15	2.2%		16	10
Slovakia	261'060	13.7%	1'189		200

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Slovenia	54'603	11.3%	3'864	49	8
Solomon Islands	7'596	6.3%	957		
Somalia		0.0%	1		19
South Africa	39'807	0.04%	1'089		22'353
Spain	2'991'881	12.2%	57'980	2'748	13'957
Sri Lanka	69'812	2.5%	21'344		37'171
Sudan	40'325	0.04%	2		3'429
Suriname	52	0.1%	1		43
Sweden	549'941	18.3%	4'878	2'310	12'480
Switzerland	190'007	18.2%	7'896	4'193	268
Syrian Arab Republic		0.0%			143
Taiwan	17'561	2.2%	5'218		205
Tajikistan	64'416	1.3%	5		
Tanzania, United Republic of	223'067	0.6%	61'580		8'235
Thailand	77'633	0.3%	31'623		30'461
Timor-Leste	31'447	9.2%	4		614
Togo	322'347	8.4%	41'233		174'864
Tonga	322	0.9%			
Tunisia	196'222	2.0%	7'798		64'966
Türkiye	312'010	0.8%	42'189	46	261'144
Uganda	505'308	3.5%	404'246		37'897
Ukraine	471'176	1.1%	383	25	183'327
United Arab Emirates	5'419	1.4%	152		826
United Kingdom	497'900	2.8%	3'193	3'426	56'629
United States of America	2'060'741	0.5%	17'445	59'003	12'104
Uruguay	3'572'286	25.4%	38		4'975
Uzbekistan	2'493	0.01%	25		547
Vanuatu	6'431	3.4%	132		
Venezuela (Bolivarian Republic of)	2'518	0.01%	8		25
Viet Nam	174'580	1.4%	62'436		14'408
Yemen		0.0%			9
Zambia	3'167	0.01%	6'771		1'427
Zimbabwe	351	0.002%	11'836		253
Total	98'865'120	2.1%	4'332'500	136'430	5'243'469

Source: FiBL survey 2025. Note: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest

1.2 Area data

Table 36: World: Organic agricultural land by country/territory (including in-conversion areas)

Country/Territory	Organic agri. land 2022 [ha]	Organic agri. land 2023 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Afghanistan	98	28	-70	28	0.0001%
Albania	733	736	3	74	0.06%
Algeria	772	3'350	2'578	2'650	0.01%
Andorra	2	2	0	-2	0.01%
Argentina	4'064'739	4'048'203	-16'536	986'238	3.4%
Armenia	674	466	-208	-534	0.03%
Australia	53'016'058	53'016'058	0	30'326'058	14.6%
Austria	705'835	701'161	-4'674	150'099	27.3%
Azerbaijan	38'080	11'483	-26'597	-11'848	0.2%

Country/Territory	Organic agri. land 2022 [ha]	Organic agri. land 2023 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Bahamas	49	49	0	0	0.4%
Bahrain		1	1	1	0.01%
Bangladesh	1'400	1'400	0	850	0.01%
Belarus	6'159	5'387	-772	5'387	0.07%
Belgium	103'437	102'359	-1'078	35'655	7.5%
Belize	508	440	-68	-453	0.2%
Benin	59'476	60'275	800	57'931	1.5%
Bhutan	5'608	3'704	-1'904	-3'125	0.7%
Bolivia (Plurinational State of)	117'368	117'368	0	3'062	0.3%
Bosnia and Herzegovina	2'495	2'495	0	2'143	0.1%
Brazil	996'413	1'023'089	26'675	273'089	0.4%
British Virgin Islands	26	26	0	26	0.4%
Bulgaria	110'441	147'798	37'357	73'447	2.9%
Burkina Faso	91'192	286'167	194'975	266'057	2.2%
Burundi	416	1'751	1'335	1'603	0.08%
Cambodia	30'694	35'543	4'849	25'654	0.6%
Cameroon	1'556	2'831	1'275	2'452	0.03%
Canada	1'567'077	1'288'514	-278'563	384'566	2.3%
Channel Islands	180	180	0	0	2.1%
Chile	187'101	287'905	100'804	267'973	2.7%
China	2'898'191	3'420'457	522'267	1'495'457	0.7%
Colombia	39'413	29'322	-10'091	-2'299	0.07%
Comoros	699	262	-437	-1'461	0.2%
Congo, Republic of		5'708	5'708	5'708	0.05%
Cook Islands	9	9	0	-1	0.5%
Costa Rica	12'052	10'962	-1'090	3'130	0.6%
Côte d'Ivoire	78'783	104'228	25'445	84'680	0.4%
Croatia	129'374	119'873	-9'501	69'819	8.0%
Cuba	2'129	4'936	2'807	1'957	0.08%
Cyprus	7'749	10'470	2'721	6'583	7.7%
Czech Republic	562'395	595'190	32'795	122'526	16.9%
Democratic Republic of the Congo	116'493	108'297	-8'196	19'239	0.3%
Denmark	300'057	303'430	3'373	137'657	11.6%
Dominica	2'907	2'907	0	2'667	11.6%
Dominican Republic	196'572	185'959	-10'613	19'740	7.7%
Ecuador	61'570	72'601	11'031	26'783	1.3%
Egypt	116'000	116'000	0	30'199	2.9%
El Salvador	2'087	1'959	-128	-4'777	0.2%
Estonia	231'011	225'256	-5'755	69'696	22.9%
Eswatini	8'670	2'878	-5'791	2'871	0.2%
Ethiopia	238'146	438'745	200'598	277'758	1.1%
Falkland Islands (Malvinas)	31'937	31'937	0	-371'275	2.8%
Faroe Islands	251	251	0	-2	8.4%
Fiji	19'089	12'868	-6'221	3'650	4.1%
Finland	339'460	311'498	-27'962	98'845	13.7%
France	2'876'052	2'767'447	-108'605	1'648'602	9.6%
French Guiana (France)	3'606	4'213	607	2'199	13.0%
French Polynesia	2'197	4'499	2'302	4'406	9.3%
Georgia	5'303	5'871	568	4'579	0.2%
Germany	1'859'842	1'888'999	29'157	841'366	11.3%
Ghana	71'491	125'469	53'979	109'906	1.0%
Greece	924'853	924'853	0	562'027	17.6%
Grenada	104	176	72	91	2.2%
Guadeloupe (France)	1'417	1'309	-108	1'240	2.6%
Guatemala	70'207	125'333	55'127	111'953	2.7%
Haiti	3'777	3'233	-544	355	0.2%

Country/Territory	Organic agri. land 2022 [ha]	Organic agri. land 2023 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Honduras	66'179	95'436	29'257	70'486	2.7%
Hungary	320'517	320'251	-266	195'410	6.4%
Iceland	6'440	6'440	0	-4'734	0.3%
India	4'726'715	4'475'837	-250'878	3'755'837	2.5%
Indonesia	87'195	71'947	-15'248	-41'691	0.1%
Iran (Islamic Republic of)	6'817	15'412	8'595	3'811	0.03%
Iraq	63	63	0	12	0.001%
Ireland	95'701	178'653	82'952	126'782	4.0%
Israel	5'091	5'091	0	-1'549	0.8%
Italy	2'349'880	2'455'586	105'706	1'067'673	18.7%
Jamaica	21	17	-4	-10	0.004%
Japan	15'319	18'837	3'518	8'900	0.4%
Jordan	1'478	1'463	-15	-908	0.1%
Kazakhstan	103'447	191'283	87'836	-99'920	0.09%
Kenya	172'503	173'120	617	168'226	0.6%
Kosovo	677	505	-172	391	0.1%
Kuwait	25	33	8	33	0.02%
Kyrgyzstan	28'262	19'114	-9'149	12'185	0.2%
Lao People's Democratic Republic	11'545	27'025	15'481	20'750	1.3%
Latvia	312'820	297'111	-15'709	93'668	15.1%
Lebanon	1'466	1'398	-68	319	0.2%
Liberia	2'762	7'247	4'485	7'247	0.4%
Liechtenstein	1'555	1'612	57	478	44.6%
Lithuania	265'365	249'122	-16'243	84'732	8.5%
Luxembourg	8'255	8'262	7	3'772	6.3%
Madagascar	112'644	170'279	57'635	140'014	0.4%
Malawi		20'734	20'734	20'632	0.3%
Malaysia	1'339	1'386	47	783	0.02%
Mali	17'840	21'276	3'436	9'358	0.05%
Malta	66	66	0	33	0.6%
Martinique (France)	1'052	945	-108	697	3.0%
Mauritius	13	13	0	7	0.01%
Mayotte	212	170	-42	165	0.8%
Mexico	293'859	277'333	-16'526	-224'031	0.3%
Moldova	28'616	41'480	12'864	19'378	1.8%
Mongolia	933	957	24	957	0.001%
Montenegro	3'966	4'272	306	983	1.7%
Morocco	18'531	13'325	-5'206	4'665	0.04%
Mozambique	17'089	16'804	-284	1'383	0.04%
Myanmar	10'143	7'118	-3'024	1'798	0.05%
Namibia	596	659	63	-29'423	0.002%
Nepal	2'635	16'974	14'339	7'614	0.4%
Netherlands	80'086	87'416	7'330	38'257	4.8%
New Caledonia	801	22	-779	-389	0.01%
New Zealand	79'347	79'347	0	-27'406	0.8%
Nicaragua	30'880	30'880	0	-2'741	0.6%
Niger		705	705	443	0.002%
Nigeria	64'252	157'019	92'767	151'998	0.2%
North Macedonia	8'724	8'322	-402	5'176	0.7%
Norway	46'007	46'063	56	-3'764	4.7%
Oman	7	7	0	-32	0.0005%
Pakistan	69'850	107'400	37'550	83'572	0.3%
Palestine	4'830	5'162	332	-1'734	1.3%
Panama	5'768	5'333	-435	-9'850	0.2%
Papua New Guinea	19'723	10'192	-9'531	-9'604	0.7%
Paraguay	116'695	163'836	47'140	109'392	1.0%

Country/Territory	Organic agri. land 2022 [ha]	Organic agri. land 2023 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Peru	285'534	247'216	-38'319	-15'796	1.0%
Philippines	188'957	187'425	-1'531	110'573	1.5%
Poland	554'632	636'021	81'389	-21'881	4.4%
Portugal	759'977	860'878	100'901	648'532	21.7%
Republic of Korea	39'624	37'825	-1'799	19'519	2.4%
Réunion (France)	2'201	2'397	196	1'738	5.0%
Romania	644'520	693'998	49'478	404'747	5.1%
Russian Federation	187'021	96'576	-90'445	-149'270	0.04%
Rwanda	5'058	5'421	363	3'173	0.3%
Saint Lucia	20	57	37	57	0.6%
Samoa	47'171	41'307	-5'864	830	14.6%
Sao Tome and Principe	9'281	9'281	0	2'575	22.1%
Saudi Arabia	23'315	23'410	95	-14'153	0.01%
Senegal	3'357	3'385	28	-3'544	0.04%
Serbia	25'035	29'002	3'967	19'454	0.8%
Sierra Leone	194'684	214'930	20'246	214'930	5.4%
Singapore	15	15	0	15	2.2%
Slovakia	253'156	261'060	7'904	80'752	13.7%
Slovenia	53'202	54'603	1'401	13'366	11.3%
Solomon Islands	7'596	7'596	0	2'293	6.3%
South Africa	44'769	39'807	-4'962	20'305	0.04%
Spain	2'675'331	2'991'881	316'550	1'281'406	12.2%
Sri Lanka	68'072	69'812	1'740	7'252	2.5%
Sudan	70'177	40'325	-29'852	-89'675	0.04%
Suriname	52	52	0	13	0.07%
Sweden	597'204	549'941	-47'263	48'110	18.3%
Switzerland	186'335	190'007	3'672	56'034	18.2%
Taiwan	13'545	17'561	4'016	11'568	2.2%
Tajikistan	64'704	64'416	-289	64'215	1.3%
Tanzania, United Republic of	313'231	223'067	-90'164	36'530	0.6%
Thailand	241'497	77'633	-163'863	39'950	0.3%
Timor-Leste	32'311	31'447	-864	5'968	9.2%
Togo	158'581	322'347	163'766	307'026	8.4%
Tonga	322	322	0	-1'675	0.9%
Tunisia	227'582	196'222	-31'360	57'135	2.0%
Türkiye	310'584	312'010	1'426	-179'967	0.8%
Uganda	505'308	505'308	0	265'111	3.5%
Ukraine	263'619	471'176	207'557	70'412	1.1%
United Arab Emirates	5'419	5'419	0	1'133	1.4%
United Kingdom	491'300	497'900	6'600	-23'575	2.8%
United States of America	2'060'741	2'060'741	0	506'224	0.5%
Uruguay	2'740'999	3'572'286	831'287	2'264'865	25.4%
Uzbekistan	2'384	2'493	109	2'493	0.01%
Vanuatu	2'325	6'431	4'106	-163	3.4%
Venezuela (Bolivarian Republic of)	2'496	2'518	22	2'518	0.01%
Viet Nam	31'242	174'580	143'337	131'573	1.4%
Zambia	8'893	3'167	-5'726	2'925	0.01%
Zimbabwe	1'450	351	-1'099	-123	0.002%
Total	96'345'568	98'865'120	2'519'552	50'170'448	2.1%

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 333

*Total includes correction value for French overseas

Table 37: World: Organic agricultural land (including in-conversion areas) by country/territory 2023 (sorted)

For an alphabetical country list, see page 269).

Country/Territory	Hectares	Country/Territory	Hectares
Australia	53'016'058	Bolivia (Plurinational State of)	117'368
India	4'475'837	Egypt	116'000
Argentina	4'048'203	Democratic Republic of the Congo	108'297
Uruguay	3'572'286	Pakistan	107'400
China	3'420'457	Côte d'Ivoire	104'228
Spain	2'991'881	Belgium	102'359
France	2'767'447	Russian Federation	96'576
Italy	2'455'586	Honduras	95'436
United States of America	2'060'741	Netherlands	87'416
Germany	1'888'999	New Zealand	79'347
Canada	1'288'514	Thailand	77'633
Brazil	1'023'089	Ecuador	72'601
Greece	924'853	Indonesia	71'947
Portugal	860'878	Sri Lanka	69'812
Austria	701'161	Tajikistan	64'416
Romania	693'998	Benin	60'275
Poland	636'021	Slovenia	54'603
Czech Republic	595'190	Norway	46'063
Sweden	549'941	Moldova	41'480
Uganda	505'308	Samoa	41'307
United Kingdom	497'900	Sudan	40'325
Ukraine	471'176	South Africa	39'807
Ethiopia	438'745	Republic of Korea	37'825
Togo	322'347	Cambodia	35'543
Hungary	320'251	Falkland Islands (Malvinas)	31'937
Türkiye	312'010	Timor-Leste	31'447
Finland	311'498	Nicaragua	30'880
Denmark	303'430	Colombia	29'322
Latvia	297'111	Serbia	29'002
Chile	287'905	Lao People's Democratic Republic	27'025
Burkina Faso	286'167	Saudi Arabia	23'410
Mexico	277'333	Mali	21'276
Slovakia	261'060	Malawi	20'734
Lithuania	249'122	Kyrgyzstan	19'114
Peru	247'216	Japan	18'837
Estonia	225'256	Taiwan	17'561
Tanzania, United Republic of	223'067	Nepal	16'974
Sierra Leone	214'930	Mozambique	16'804
Tunisia	196'222	Iran (Islamic Republic of)	15'412
Kazakhstan	191'283	Morocco	13'325
Switzerland	190'007	Fiji	12'868
Philippines	187'425	Azerbaijan	11'483
Dominican Republic	185'959	Costa Rica	10'962
Ireland	178'653	Cyprus	10'470
Viet Nam	174'580	Papua New Guinea	10'192
Kenya	173'120	Sao Tome and Principe	9'281
Madagascar	170'279	North Macedonia	8'322
Paraguay	163'836	Luxembourg	8'262
Nigeria	157'019	Solomon Islands	7'596
Bulgaria	147'798	Liberia	7'247
Ghana	125'469	Myanmar	7'118
Guatemala	125'333	Iceland	6'440
Croatia	119'873	Vanuatu	6'431

Country/Territory	Hectares
Georgia	5'871
Congo, Republic of	5'708
Rwanda	5'421
United Arab Emirates	5'419
Belarus	5'387
Panama	5'333
Palestine	5'162
Israel	5'091
Cuba	4'936
French Polynesia	4'499
Montenegro	4'272
French Guiana (France)	4'213
Bhutan	3'704
Senegal	3'385
Algeria	3'350
Haiti	3'233
Zambia	3'167
Dominica	2'907
Eswatini	2'878
Cameroon	2'831
Venezuela (Bolivarian Republic of)	2'518
Bosnia and Herzegovina	2'495
Uzbekistan	2'493
Réunion (France)	2'397
El Salvador	1'959
Burundi	1'751
Liechtenstein	1'612
Jordan	1'463
Bangladesh	1'400
Lebanon	1'398
Malaysia	1'386

Country/Territory	Hectares
Guadeloupe (France)	1'309
Mongolia	957
Martinique (France)	945
Albania	736
Niger	705
Namibia	659
Kosovo	505
Armenia	466
Belize	440
Zimbabwe	351
Tonga	322
Comoros	262
Faroe Islands	251
Channel Islands	180
Grenada	176
Mayotte	170
Malta	66
Iraq	63
Saint Lucia	57
Suriname	52
Bahamas	49
Kuwait	33
Afghanistan	28
British Virgin Islands	26
New Caledonia	22
Jamaica	17
Singapore	15
Mauritius	13
World*	98'865'120

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 333

*Total includes correction value for French overseas

Table 38: World: Organic shares of total agricultural land by country/territory 2023 (sorted)

For an alphabetical country list, see page 269.

Country/Territory	Organic share [%]
Liechtenstein	44.6%
Austria	27.3%
Uruguay	25.4%
Estonia	22.9%
Sao Tome and Principe	22.1%
Portugal	21.7%
Italy	18.7%
Sweden	18.3%
Switzerland	18.2%
Greece	17.6%
Czech Republic	16.9%
Latvia	15.1%
Samoa	14.6%

Country/Territory	Organic share [%]
Australia	14.6%
Finland	13.7%
Slovakia	13.7%
French Guiana (France)	13.0%
Spain	12.2%
Dominica	11.6%
Denmark	11.6%
Germany	11.3%
Slovenia	11.3%
France	9.6%
French Polynesia	9.3%
Timor-Leste	9.2%
Lithuania	8.5%
Togo	8.4%

Country/Territory	Organic share [%]
Faroe Islands	8.4%
Croatia	8.0%
Cyprus	7.7%
Dominican Republic	7.7%
Belgium	7.5%
Hungary	6.4%
Solomon Islands	6.3%
Luxembourg	6.3%
Sierra Leone	5.4%
Romania	5.1%
Réunion (France)	5.0%
Netherlands	4.8%
Norway	4.7%
Poland	4.4%
Fiji	4.1%
Ireland	4.0%
Uganda	3.5%
Vanuatu	3.4%
Argentina	3.4%
Martinique (France)	3.0%
Bulgaria	2.9%
Egypt	2.9%
United Kingdom	2.8%
Falkland Islands (Malvinas)	2.8%
Guatemala	2.7%
Chile	2.7%
Honduras	2.7%
Guadeloupe (France)	2.6%
India	2.5%
Sri Lanka	2.5%
Republic of Korea	2.4%
Canada	2.3%
Burkina Faso	2.2%
Taiwan	2.2%
Singapore	2.2%
Grenada	2.2%
Channel Islands	2.1%
Tunisia	2.0%
Moldova	1.8%
Montenegro	1.7%
Benin	1.5%
Philippines	1.5%
Viet Nam	1.4%
United Arab Emirates	1.4%
Lao People's Democratic Republic	1.3%
Ecuador	1.3%
Palestine	1.3%
Tajikistan	1.3%
Ukraine	1.1%
Ethiopia	1.1%
Ghana	1.0%
Paraguay	1.0%
Peru	1.0%
Tonga	0.9%
Mayotte	0.8%
Serbia	0.8%
Türkiye	0.8%

Country/Territory	Organic share [%]
Israel	0.8%
New Zealand	0.8%
Bhutan	0.7%
Papua New Guinea	0.7%
North Macedonia	0.7%
China	0.7%
Kenya	0.6%
Malta	0.6%
Nicaragua	0.6%
Costa Rica	0.6%
Cambodia	0.6%
Saint Lucia	0.6%
Tanzania, United Republic of	0.6%
United States of America	0.5%
Cook Islands	0.5%
Côte d'Ivoire	0.4%
Brazil	0.4%
Madagascar	0.4%
Nepal	0.4%
Japan	0.4%
Liberia	0.4%
Bahamas	0.4%
British Virgin Islands	0.4%
Iceland	0.3%
Malawi	0.3%
Thailand	0.3%
Democratic Republic of the Congo	0.3%
Bolivia (Plurinational State of)	0.3%
Pakistan	0.3%
Mexico	0.3%
Rwanda	0.3%
Georgia	0.2%
Panama	0.2%
Belize	0.2%
Eswatini	0.2%
Azerbaijan	0.2%
Nigeria	0.2%
Lebanon	0.2%
Comoros	0.2%
Kyrgyzstan	0.2%
Haiti	0.2%
El Salvador	0.2%
Jordan	0.1%
Bosnia and Herzegovina	0.1%
Kosovo	0.1%
Indonesia	0.1%
Kazakhstan	0.1%
Burundi	0.1%
Cuba	0.1%
Colombia	0.1%
Suriname	0.1%
Belarus	0.1%
Albania	0.1%
Myanmar	0.1%
Congo, Republic of	0.1%
Mali	0.05%
Russian Federation	0.04%

Country/Territory	Organic share [%]	Country/Territory	Organic share [%]
Morocco	0.04%	Andorra	0.01%
South Africa	0.04%	Uzbekistan	0.01%
Mozambique	0.04%	Bahrain	0.01%
Sudan	0.04%	Algeria	0.01%
Senegal	0.04%	Jamaica	0.004%
Iran (Islamic Republic of)	0.03%	Zimbabwe	0.002%
Cameroon	0.03%	Namibia	0.002%
Armenia	0.03%	Niger	0.002%
Kuwait	0.02%	Mongolia	0.001%
Malaysia	0.02%	Iraq	0.001%
Mauritius	0.01%	Oman	0.0005%
Bangladesh	0.01%	Afghanistan	0.0001%
Saudi Arabia	0.01%	World	2.1%
Zambia	0.01%		
New Caledonia	0.01%		
Venezuela (Bolivarian Republic of)	0.01%		

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Calculation of organic shares based on FAOSTAT, Eurostat, and national sources. For detailed data sources, see annex, page 333

Table 39: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by country 2023

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Afghanistan	28					28
Albania	736			469'325		470'061
Algeria	3'350					3'350
Andorra	2					2
Argentina	4'048'203			4'324		4'052'527
Armenia	466			414		880
Australia	53'016'058					53'016'058
Austria	701'161					701'161
Azerbaijan	11'483					11'483
Bahamas	49					49
Bahrain	1					1
Bangladesh	1'400					1'400
Belarus	5'387					5'387
Belgium	102'359					102'359
Belize	440					440
Benin	60'275					60'275
Bhutan	3'704			2'223		5'927
Bolivia	117'367			2'231'038		2'348'406
Bosnia and Herzegovina	2'495			195'668		198'163
Brazil	1'023'089			2'266'820		3'289'909
British Virgin Islands	26					26
Bulgaria	147'798			232'200		379'998
Burkina Faso	286'167			248'621		534'788
Burundi	1'751					1'751
Cambodia	35'543			4		35'547
Cameroon	2'831					2'831
Canada	1'288'514		9'140	160		1'297'815
Chad				804'476		804'476
Channel Islands	180					180
Chile	287'905			86'723		374'628
China	3'420'457			2'884'673		6'305'130

Country/Territory	Agriculture [ha]	Aqua- culture [ha]	Forest [ha]	Wild collection [ha]*	Other non- agri. land [ha]	Total [ha]
Colombia	29'323					29'323
Comoros	262					262
Congo, Republic of	5'708					5'708
Cook Islands	9					9
Costa Rica	10'962					10'962
Côte d'Ivoire	104'228					104'228
Croatia	119'873					119'873
Cuba	4'936					4'936
Cyprus	10'471					10'471
Czech Republic	595'189					595'189
Congo, D.R.	108'297					108'297
Denmark	303'430					303'430
Dominica	2'907					2'907
Dominican Republic	185'959				1'294	187'253
Ecuador	72'601	631	40'007	2'438		115'678
Egypt	116'000					116'000
El Salvador	1'960					1'960
Estonia	225'257					225'257
Eswatini	2'878					2'878
Ethiopia	438'745					438'745
Falkland Islands (Malvinas)	31'937					31'937
Faroe Islands	251					251
Fiji	12'868			11'888		24'757
Finland	311'498			6'900'000		7'211'498
France	2'767'447					2'767'447
French Guiana (France)	4'213					4'213
French Polynesia	4'499					4'499
Georgia	5'871			270		6'141
Germany	1'888'999					1'888'999
Ghana	125'469			12'575		138'044
Greece	924'853					924'853
Grenada	176					176
Guadeloupe (France)	1'309					1'309
Guatemala	125'333			86'679		212'012
Guyana				55'449		55'449
Haiti	3'233					3'233
Honduras	95'436					95'436
Hungary	320'251					320'251
Iceland	6'440		48	454'382		460'870
India	4'475'837			2'850'156		7'325'993
Indonesia	71'947	855		144'566		217'367
Iran	15'413					15'413
Iraq	63					63
Ireland	178'654					178'654
Israel	5'091					5'091
Italy	2'455'587					2'455'587
Jamaica	17			7		24
Japan	18'837					18'837
Jordan	1'463					1'463
Kazakhstan	191'283			30		191'313
Kenya	173'120			535'068		708'188
Kosovo	505			249'127		249'632
Kuwait	33					33
Kyrgyzstan	19'114			154'042		173'156
Lao P.D.R.	27'025					27'025

Annex > Global data > Area

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Latvia	297'112					297'112
Lebanon	1'399			240		1'639
Lesotho				284'567		284'567
Liberia	7'247					7'247
Liechtenstein	1'612					1'612
Lithuania	249'122					249'122
Luxembourg	8'261					8'261
Madagascar	170'279		1'458	694		172'430
Malawi	20'734					20'734
Malaysia	1'386			1'115		2'501
Mali	21'276			14'795		36'071
Malta	66					66
Martinique (France)	945					945
Mauritius	13					13
Mayotte	170					170
Mexico	277'333			417'986	59'541	754'860
Moldova	41'480			6'531		48'011
Mongolia	957					957
Montenegro	4'273					4'273
Morocco	13'325			714'528		727'853
Mozambique	16'804			2'041'400		2'058'204
Myanmar	7'118	20				7'138
Namibia	659			312'108		312'767
Nepal	16'974			87'214		104'188
Netherlands	87'416					87'416
New Caledonia	22			131'160		131'182
New Zealand	79'347					79'347
Nicaragua	30'880					30'880
Niger	705					705
Nigeria	157'019			58'495		215'514
North Macedonia	8'323			556'600		564'923
Norway	46'063					46'063
Oman	7			2'200		2'207
Pakistan	107'400					107'400
Palestine	5'162					5'162
Panama	5'333					5'333
Papua New Guinea	10'192					10'192
Paraguay	163'836				1'468'975	1'632'811
Peru	247'216			189'239		436'455
Philippines	187'425					187'425
Poland	636'021					636'021
Portugal	860'878					860'878
Republic of Korea	37'825					37'825
Réunion (France)	2'397					2'397
Romania	693'998					693'998
Russian Federation	96'576			819'501		916'076
Rwanda	5'421					5'421
Saint Lucia	57					57
Samoa	41'307			5'864		47'171
Sao Tome and Principe	9'281					9'281
Saudi Arabia	23'410					23'410
Senegal	3'385			15'258		18'643
Serbia	29'002			610'000		639'002
Sierra Leone	214'930					214'930
Singapore	15					15
Slovakia	261'059					261'059

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Slovenia	54'603					54'603
Solomon Islands	7'596					7'596
Somalia				37'400		37'400
South Africa	39'806		137	204'685	4'086	248'714
Spain	2'991'881		169'158			3'161'039
Sri Lanka	69'812			16		69'828
Sudan	40'325			109'681		150'006
Suriname	52					52
Sweden	549'941					549'941
Switzerland	190'007					190'007
Taiwan	17'561					17'561
Tajikistan	64'416					64'416
Tanzania, United Republic of	223'067		13	510		223'590
Thailand	77'633	88		91'071		168'792
Timor-Leste	31'447					31'447
Togo	322'346					322'346
Tonga	322					322
Tunisia	196'222	26	30'679			226'927
Türkiye	312'010			30'538		342'548
Uganda	505'308					505'308
Ukraine	471'176			93'000		564'176
United Arab Emirates	5'419			2		5'421
United Kingdom	497'900		17'800			515'700
United States of America	2'060'741					2'060'741
Uruguay	3'572'286					3'572'286
Uzbekistan	2'493			1'178		3'671
Vanuatu	6'431					6'431
Venezuela	2'518					2'518
Viet Nam	174'580	19'976				194'555
Zambia	3'167			2'500'000		2'503'166
Zimbabwe	351			160		511
Total	98'865'120	21'595	268'440	30'221'082	1'533'896	130'910'138

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333; Blank cells: No data available.

*Wild collection and beekeeping areas, **Total includes correction value for French overseas departments.

1.3 Organic operators

Table 40: World: Organic producers and other operator types by country 2023

For many countries (particularly those with no private or governmental data collection system), data on the various operator types are missing or incomplete. Please note that for some countries data is compiled from several sources (i.e. several certifiers), not all of which were updated.

Country/Territory	Producers ¹	Processors	Importers	Exporters
Albania	150	59	5	14
Algeria	6	7	1	8
Andorra		3		
Argentina	1'368	539		99

¹Some countries report only the numbers of companies, projects or grower groups, which may each comprise a number of producers.

Annex > Global data > Operators

Country/Territory	Producers ¹	Processors	Importers	Exporters
Armenia	22			
Australia	1'635	1'396		
Austria	26'251	2'374	86	1
Azerbaijan	4	5		
Bahrain	1	1		1
Bangladesh		1		
Belarus	33	9		6
Belgium	2'638	1'881	365	192
Belize	385	1		
Benin	5'895	4		11
Bhutan	2'760	227		6
Bolivia (Plurinational State of)	12'517	42	1	233
Bosnia and Herzegovina	90	51		20
Brazil	24'853	1'815	1'419	
Brunei Darussalam		1		
Bulgaria	4'438	383	105	96
Burkina Faso	35'625	39		58
Burundi	669	3		2
Cambodia	7'710	37		28
Cameroon	14	1		4
Canada	6'751	1'953		
Chad	2'960	3		3
Chile	994			88
China	15'676	5'306	282	265
Colombia	38	50		89
Comoros	1	2		1
Congo, Republic of	2	1		
Cook Islands	16	1		1
Costa Rica	2'626	33		10
Côte d'Ivoire	4'803	14		26
Cuba	9	5		1
Cyprus	1'515	91	39	1
Czech Republic	5'347	942	340	159
Democratic Republic of the Congo	118'203	32		22
Denmark	3'960	983	126	169
Dominica	258	2		
Dominican Republic	16'840	16'840		174
Ecuador	9'589	46	13	221
Egypt	984	242		242
El Salvador	371	18		6
Croatia	6'274	421	8	
Estonia	1'968	170	34	27
Ethiopia	121'552	90		
Falkland Islands (Malvinas)	3			
Faroe Islands	1	1		
Fiji	16			
Finland	4'236	417	53	41
France	61'167	20'141	722	
French Guiana (France)	108	14	1	
Georgia	659	31		
Germany	36'680	22'382	1'971	1'571
Ghana	914	35		13
Greece	58'691	1'727	52	71
Grenada	2			
Guadeloupe (France)	247	35	2	
Guatemala	149	124	2	149
Guinea		0		3
Guyana		1		1
Haiti	3'434			2
Honduras	15'876	60	58	
Hong Kong		3		
Hungary	5'983	468	49	0
Iceland	30	20	8	3
India	2'358'267	1'489		
Indonesia	23'346	152		236
Iran (Islamic Republic of)	327	54		
Ireland	4'076	194	212	65
Israel	336	138	80	41
Italy	84'191	24'800	573	1'127

Country/Territory	Producers ¹	Processors	Importers	Exporters
Jamaica	4			
Japan	3'945	3'361	388	
Jordan	19	8		6
Kazakhstan	27	6	7	28
Kenya	63'230	147	1	102
Kosovo	44	43		
Kuwait	1			1
Kyrgyzstan	1'003	7		3
Lao People's Democratic Republic	1'619	4		1
Latvia	3'379	395	10	0
Lebanon	49	13	4	
Lesotho	2	2		
Liberia	2	2		
Liechtenstein	40			
Lithuania	2'596	174	1	
Luxembourg	161	83	5	0
Madagascar	62'024	28		141
Malawi	2	2		
Malaysia	35	31		23
Mali	12'419	1		9
Malta	25	7	34	
Martinique (France)	142	32	1	
Mauritius	9	1		13
Mayotte	47	1		
Mexico	49'940	931	194	
Moldova	141	25	3	11
Monaco		35		
Mongolia	180			
Montenegro	483	25	5	0
Morocco	449	270		134
Mozambique	69	2		1
Myanmar	65	13		17
Namibia	3			
Nepal	133	1		1
Netherlands	2'110	1'222	529	134
New Caledonia				1
New Zealand	685	345		119
French Polynesia	74	2		2
Nicaragua	8'792	47		61
Niger	1	1		0
Nigeria	1'151	23		3
North Macedonia	888	17	5	3
Norway	3'913	459	127	17
Oman	1	1		1
Pakistan	944	61		53
Palestine	1'478	40		2
Panama	50	2		2
Papua New Guinea	10'203			
Paraguay	7'285	33		32
Peru	93'167			
Philippines	14'402	59		78
Poland	22'354	1'202	331	424
Portugal	16'028	1'245	65	42
Puerto Rico		1		
Republic of Korea	24'072	729		
Réunion (France)	539	69	9	
Romania	12'598	203	25	25
Russian Federation	48	26		
Rwanda	9	3		15
Saint Lucia	1			
Samoa	1'857	1		2
Sao Tome and Principe	4	1		9
Saudi Arabia	540	1		
Senegal	2	21		16
Serbia	525	146	68	64
Seychelles	1	1		1
Sierra Leone	5'518	18		3
Singapore		16	1	15
Slovakia	1'189	161	63	36

Country/Territory	Producers ¹	Processors	Importers	Exporters
Slovenia	3'864	214	40	1
Solomon Islands	957			
Somalia	1	7		
South Africa	1'089	79		
Spain	57'980	6'149	594	681
Sri Lanka	21'344	392	14	388
Sudan	2	1		
Suriname	1	1		1
Sweden	4'878	950	295	35
Switzerland	7'896	1'375	717	17
Taiwan	5'218			
Tajikistan	5	3		1
Tanzania, United Republic of	61'580	18		
Thailand	31'623	286		
Timor-Leste	4	4		4
Togo	41'233	34		32
Tonga		1		1
Tunisia	7'798	389	6	198
Türkiye	42'189	1'070	74	471
Uganda	404'246	116		78
Ukraine	383	70		
United Arab Emirates	152	22		14
United Kingdom	3'193	1'814	216	
United States of America	17'445			
Uruguay	37	24		20
Uzbekistan	25	8		
Vanuatu	132			
Venezuela (Bolivarian Republic of)	8	4		1
Viet Nam	62'436	187		
Zambia	6'771	3		
Zimbabwe	11'836			
Total	4'332'500	133'286	10'439	9'201

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333. Total includes correction value for French overseas departments.

1.4 International Trade

Table 41: World: Exports to the EU and USA: by crop/product 2023

Crop/product	Export to EU [MT]		Export to USA [MT]	
	2022	2023	2022	2023
Fruit, tropical and subtropical	785'249	769'519	647'541	657'349
Vegetable and animal oils and fats	310'400	266'119	56'318	306'502
Oilseeds	276'795	232'727	343'806	295'029
Sugar	190'698	151'147	257'244	349'585
Cereals	152'579	157'964	294'005	280'227
Fruit, berries and nuts, prepared and preserved	148'004	125'034	24'169	23'128
Coffee	133'422	131'910	103'006	101'460
Grain mill products	116'182	107'840	26'384	49'739
Other	613'444	537'058	416'427	701'131
Total	2'726'775	2'479'319	2'168'901	2'764'150

Source: TRACES/European Union and GATS/USDA 2024.

Table 42: World: Organic imports to the European Union and US by country of origin 2023

This table covers imports into the European Union and the United States. For the United States, imports are incomplete as not all products are included.

Country/ Territory	Exports to EU [MT]	Exports to USA [MT]	Exports to EU and USA [MT]
Afghanistan	0.1	1	1
Albania	1'263	9	1'273
Algeria	1'910	76	1'986
Angola	0.1		0.1
Argentina	27'183	251'484	278'667
Armenia	82	50	132
Australia	929	55	983
Austria		1'231	1'231
Azerbaijan	1'462	1	1'463
Bangladesh		44	44
Belarus	167		167
Belize	44		44
Benin	2'131	8'729	10'859
Bolivia (Plurinational State of)	9'860	9'203	19'062
Bosnia and Herzegovina	6'935		6'935
Brazil	44'793	174'973	219'767
Bulgaria		8'647	8'647
Burkina Faso	18'076		18'076
Burundi	58	58	115
Cambodia	9'204	1'114	10'317
Cameroon	266	39	305
Canada	22'471	269'331	291'802
Chad	416		416
Chile	14'876	25'024	39'900
China	200'170	6'151	206'321
Colombia	120'189	156'640	276'829
Comoros	13		13
Congo, Republic of		11	11
Costa Rica	19'420	9'128	28'548
Côte d'Ivoire	38'170		38'170
Croatia		22	22
Cuba	2'236		2'236
Cyprus		4	4
Democratic Republic of the Congo	11'866	154	12'020
Denmark		0.1	0.1
Dominica	17		17
Dominican Republic	191'788	3'590	195'377
Ecuador	359'554	305'929	665'483
Egypt	35'531	38	35'570
El Salvador	277	212	489
Ethiopia	6'447	39'628	46'074
Fiji	64		64
France		2'162	2'162
French Polynesia	65		65
Georgia	677	84	761
Germany		980	980
Ghana	22'779	46'482	69'261
Greece		1'964	1'964
Grenada	8		8
Guatemala	2'331	9'354	11'685
Guinea	27		27
Guinea-Bissau	584		584
Guyana	430		430
Haiti	300	27	327
Honduras	45'205	28'498	73'703
Hong Kong	261	2	264
Hungary		1	1
India	68'109	89'873	157'982
Indonesia	7'798	5'692	13'490
Iran (Islamic Republic of)	1'436		1'436
Israel	12'223	888	13'110
Italy		25'319	25'319
Jamaica		13	13
Japan	3'342	664	4'006
Jordan	107	9	116
Kazakhstan	24'989	929	25'918
Kenya	15'202	405	15'607

Annex > Global data > International Trade

Country/ Territory	Exports to EU [MT]	Exports to USA [MT]	Exports to EU and USA [MT]
Kosovo	408	30	438
Kyrgyzstan	929		929
Lao People's Democratic Republic	11'028	19	11'047
Lebanon	13	64	77
Lesotho	705		705
Liberia	25		25
Lithuania		2	2
Madagascar	5'855	335	6'190
Malaysia	27	8	34
Maldives	223		223
Mali	3'827		3'827
Mauritius	1	45	46
Mexico	48'728	679'904	728'632
Moldova	12'191	13	12'204
Montenegro	25		25
Morocco	16'965	68	17'033
Mozambique	6'315		6'315
Myanmar	27		27
Namibia	114		114
Nepal	303	1	304
Netherlands		5'429	5'429
New Caledonia	0.3		0.3
New Zealand	6'724	34'490	41'215
Nicaragua	5'050	7'708	12'759
Niger	400		400
Nigeria	472	17'119	17'591
North Macedonia	258	6	264
Oman	0.4		0.4
Pakistan	49'959	5'808	55'767
Palestine	623		623
Panama	273	21	294
Papua New Guinea	1'295	767	2'062
Paraguay	23'026	40'035	63'061
Peru	182'270	120'556	302'826
Philippines	16'403		16'403
Poland		41	41
Portugal		1'218	1'218
Republic of Korea	117	3	120
Romania		25'691	25'691
Russian Federation	13'955	72'187	86'143
Rwanda	694	139	834
Samoa	82		82
Sao Tome and Principe	6'082		6'082
Saudi Arabia	286	18	305
Senegal	2'035		2'035
Serbia	16'959	118	17'077
Seychelles	10		10
Sierra Leone	14'816		14'816
Singapore	10		10
Slovakia		200	200
Slovenia		8	8
Somalia	19		19
South Africa	21'791	562	22'353
Spain		13'957	13'957
Sri Lanka	37'142	30	37'171
Sudan	3'429		3'429
Suriname	43		43
Sweden		12'480	12'480
Switzerland		268	268
Syrian Arab Republic	133	11	143
Taiwan	112	92	205
Tanzania, United Republic of	8'102	133	8'235
Thailand	13'097	17'364	30'461
Timor-Leste	18	595	614
Togo	104'068	70'796	174'864
Tunisia	54'225	10'741	64'966
Türkiye	150'012	111'131	261'144
Uganda	26'951	10'946	37'897
Ukraine	173'720	9'608	183'327
United Arab Emirates	590	235	826
United Kingdom	56'471	157	56'629
United States of America	12'104		12'104
Uruguay	710	4'264	4'975

Country/ Territory	Exports to EU [MT]	Exports to USA [MT]	Exports to EU and USA [MT]
Uzbekistan	547		547
Venezuela (Bolivarian Republic of)	25		25
Viet Nam	12'471	1'937	14'408
Yemen		9	9
Zambia	35	1'391	1'427
Zimbabwe	253		253
Total	2'479'319	2'764'150	5'243'469

Source: TRACES/European Union and GATS/USDA 2024. Blank cells: No data available.

1.5 Organic Retail Sales

Table 43: World: Organic retail sales Retail sales, organic share of all retail sales and per capita consumption by country 2023

It should be noted that retail sales data remains problematic due to differing methods of data collection. Comments and revisions on this table should be sent to helga.willer@fibl.org.

Country	Data year	Retail sales [Million €] ¹	€/person	Organic share [%]
Australia	2022	1'338	52	
Austria	2023	2'657	292	11.0
Belgium	2023	1'153	101	4.0
Bhutan	2018	0.03	0.04	
Brazil	2016	778	4	
Bulgaria	2022	38	6	1.0
Canada	2023	4'917	123	3.4
China	2023	12'648	9	
Croatia	2018	99	24	2.2
Czech Republic	2022	274	25	1.7
Denmark	2023	2'159	362	11.8
Estonia	2023	111	81	4.6
Finland	2023	352	63	1.9
France	2023	12'081	176	5.6
Germany	2023	16'080	191	6.3
Greece	2023	60	6	
Hungary	2015	30	3	0.3
India	2023	374	0	
Ireland	2020			2.7
	2023	165	33	
Italy	2023	3'882	66	3.5
Japan	2022	1'623	13	0.3
Kenya	2023	3	0	
Latvia	2017	51	6	1.5
Lithuania	2017	51	18	1.0
Luxembourg	2023	151	228	7.20
Mongolia	2020	1	0.2	
Netherlands	2023	1'615	91	4.6
New Zealand	2017			2.2
	2020	172	34	
Norway	2023	389	80	
Poland	2022	310	8	0.6
Portugal	2011	21	2	0.2
Republic of Korea	2020			2.5
	2022	485	11	
Romania	2016	41	2	0.2
Russian Federation	2018	183	1	
Saudi Arabia	2019	325	10	
Singapore	2017	16	3	
Slovenia	2013	49	27	1.8
Spain	2021			2.5
	2023	2'748	57	
Sweden	2023	2'310	220	7.80
Switzerland	2023	4'193	468	11.6

¹ According to the Central European Bank, 1 euro corresponded to 1.0813 US dollars in 2023.

Country	Data year	Retail sales [Million €]¹	€/person	Organic share [%]
Türkiye	2014	46	1	
Ukraine	2023	25	1	
United Kingdom	2023	3'426	51	1.6
United States of America	2022			6.0
	2023	59'003	172	
Total		136'430		

Source: FiBL-AMI survey 2025, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 333. Blank cells: No data available

1.6 Use of organic areas: Wild collection, beehives, aquaculture and crops

1.6.1 Wild collection

Table 44: Wild collection and beekeeping areas by country 2023

Country	Land use	Area [ha]
Albania	Nuts, wild collection	1'352
	Wild collection, no details	467'973
Argentina	Seaweed	0
	Wild collection, no details	4'324
Armenia	Wild collection, no details	414
Bhutan	Wild collection, no details	2'223
Bolivia (Plurinational State of)	Nuts, wild collection	1'072'565
	Permanent crops, wild collection, other	1
Bosnia and Herzegovina	Wild collection, no details	1'158'472
	Wild collection, no details	195'668
Brazil	Nuts, wild collection	2'266'820
Bulgaria	Wild collection, no details	232'200
Burkina Faso	Nuts, wild collection	248'621
Cambodia	Medicinal and aromatic plants, wild collection	4
	Mushrooms, wild collection	85
Canada	Berries, wild collection	16
	Wild collection, no details	144
Chad	Nuts, wild collection	577'676
	Wild collection, no details	226'800
Chile	Wild collection, no details	86'723
China	Wild collection, no details	2'884'673
Ecuador	Medicinal and aromatic plants, wild collection	615
	Wild collection, no details	1'738
Fiji	Medicinal and aromatic plants, wild collection	11'888
Finland	Wild collection, no details	6'900'000
Georgia	Wild collection, no details	270
Ghana	Nuts, wild collection	12'558
	Wild collection, no details	17
Guatemala	Wild collection, no details	86'679
Guyana	Forest products	2'000
	Palmito, wild collection	53'449
Iceland	Seaweed	211'328
	Wild collection, no details	243'054
India	Wild collection, no details	2'850'156
Indonesia	Nuts, wild collection	
	Wild collection, no details	144'566
Jamaica	Wild collection, no details	7
Kazakhstan	Wild collection, no details	30
	Apiculture	753
Kenya	Bee pastures	754
	Medicinal and aromatic plants, wild collection	121'625
Kosovo	Oil plants, wild collection	1'514
	Wild collection, no details	410'422
Kosovo	Berries, wild collection	300
	Fruit, wild collection	248'387
Kyrgyzstan	Nuts, wild collection	75
	Rose hips, wild collection	365
Kyrgyzstan	Nuts, wild collection	100'042
	Wild collection, no details	54'000
Lebanon	Wild collection, no details	240
Lesotho	Rose hips, wild collection	282'800
	Wild collection, no details	1'767
Madagascar	Permanent crops, wild collection, other	694
Malaysia	Mushrooms, wild collection	1'115
Mali	Nuts, wild collection	95
	Wild collection, no details	14'700

Annex > Global data > Wild collection, Beehives and Aquaculture

Country	Land use	Area [ha]
Mexico	Fruit, wild collection	188
	Medicinal and aromatic plants, wild collection	2'473
	Nuts, wild collection	124'162
	Wild collection, other	291'163
Moldova	Fruit, wild collection	1
	Nuts, wild collection	1'829
Morocco	Rose hips, wild collection	4'700
	Forest products	356'813
Mozambique	Wild collection, no details	357'715
	Wild collection, no details	2'041'400
Namibia	Wild collection, no details	312'108
Nepal	Wild collection, no details	87'214
New Caledonia	Wild collection, no details	131'160
Nigeria	Wild collection, no details	58'495
North Macedonia	Medicinal and aromatic plants, wild collection	556'600
Oman	Medicinal and aromatic plants, wild collection	2'200
Peru	Nuts, wild collection	189'239
Russian Federation	Wild collection, no details	819'501
Samoa	Wild collection, no details	5'864
Senegal	Nuts, wild collection	
	Permanent crops, wild collection, other	15'138
Serbia	Wild collection, no details	120
	Wild collection, no details	610'000
Somalia	Wild collection, no details	37'400
South Africa	Medicinal and aromatic plants, wild collection	81'909
	Wild collection, no details	122'776
Sri Lanka	Medicinal and aromatic plants, wild collection	16
Sudan	Wild collection, no details	109'681
Tanzania, United Republic of	Bee pastures	489
	Medicinal and aromatic plants, wild collection	21
Thailand	Wild collection, no details	91'071
Togo	Wild collection, no details	
Türkiye	Wild collection, no details	30'538
Ukraine	Wild collection, no details	93'000
United Arab Emirates	Medicinal and aromatic plants, wild collection	2
United States of America	Berries, wild collection	
Uzbekistan	Medicinal and aromatic plants, wild collection	1'178
Zambia	Bee pastures	2'500'000
Zimbabwe	Marula, wild collection	160
Total		30'221'082

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333. Please be aware that some countries may experience double counting of areas.

1.6.2 Beehives

Table 45: Number of organic beehives by country 2023

Country/Territory	Area [ha]	Country/Territory	Area [ha]
Albania	138	Croatia	2'367
Argentina	28'035	Cyprus	184
Armenia	1'530	Denmark	177
Austria	25'380	Estonia	2'899
Belarus	3'200	Ethiopia	17'418
Belgium	30	Finland	5'086
Bhutan	177	France	122'647
Bosnia and Herzegovina	120	Georgia	1'151
Bulgaria	232'072	Germany	35'000
Canada	248	Guadeloupe (France)	151
Chile	27'730	Guatemala	35'489

Country/Territory	Area [ha]
Iran (Islamic Republic of)	4'640
Iraq	1'900
Italy	171'094
Kosovo	40
Latvia	23'541
Lebanon	940
Liechtenstein	200
Lithuania	1'126
Martinique (France)	61
Mexico	475'139
Moldova	7'200
Montenegro	3'381
Morocco	629
Nicaragua	20'985
North Macedonia	10'072
Norway	3'526
Peru	164
Portugal	48'604
Réunion (France)	1'488
Romania	170'789
Russian Federation	34
Saudi Arabia	11'000

Country/Territory	Area [ha]
Serbia	12'618
Slovakia	251
Slovenia	1'814
Spain	92'487
Sweden	2'182
Switzerland	6'320
Tanzania, United Republic of	24'623
Tunisia	377
Türkiye	87'015
Ukraine	300
Zambia	757'836*
Total	2'483'605

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333

Please note that shortly before printing, we received an update for Zambia indicating the correct number is 42,041. However, it is anticipated that the number of beehives in Zambia will increase substantially in 2024.

1.6.2 Aquaculture

Table 46: Organic aquaculture: Production volume by species 2023

Main species	Production [MT]
Mussels	54'806
Aquaculture products, no details	35'110
Salmon	32'699
Aquatic plants	21'815
Atlantic salmon	13'131
Sea bass	4'027
Oysters	3'701
Trout, no detail	2'346
Rainbow trout	2'070
Carps	1'993
Shrimps, aquaculture	1'668
Japanese carpet shell	1'320
Sturgeon	284
European seabass	250
Seabream	223
Freshwater fishes	43
Shellfish, aquaculture	3
Aquaculture, other	21'384
Total	510'050

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 47: Organic aquaculture: Production volume by country 2023

Country	Production [MT]
Austria	239
Bulgaria	1'600
Canada	17'031
China	313'168
Croatia	744
Czech Republic	1
Denmark	8'552
Ecuador	1'663
France	8'955
Greece	9'898
Hungary	1'740
Iceland	3
Ireland	34'366
Italy	23'690
Latvia	12
Netherlands	15'277
Norway	54'111
Poland	888
Romania	352
Slovenia	610
Spain	4'023
United Kingdom	13'128
Total	510'050

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

1.6.4 Crops

In this edition of our yearbook, we have included exports to the EU and the US in our crop tables. Please note that discrepancies between the area numbers and the export volumes may arise because crop data from FiBL may be incomplete in some cases. This could be due to the fact that FiBL does not receive data from all certifiers, national sources might not provide complete data, or the data displayed may be older than 2023.

1.6.4.1 Cereals

Table 48: Cereals: Organic area by country 2023

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	32	0.02	32			
Argentina	23'928	0.1	23'928		44	52'982
Australia	41'293	0.2	41'293			
Austria	135'775	17.8				
Bahrain	0	0.000		0		
Belarus	456	0.02	456			
Belgium	12'967	4.3	12'967			
Benin	13	0.001	13			
Bolivia	98'564	6.5	90'036	8'529	5'934	8'616
Bosnia and Herzegovina	138	0.1	138		2'249	
Brazil						60
Bulgaria	10'351	0.5	10'351			
Burkina Faso	630	0.01	630		0	
Cambodia	24'687	0.7	24'687			
Cameroon	27	0.001	27			
Canada	285'918	1.8	285'918		7'016	118'528
Chile	1'373	0.3	1'373			
China	1'742'417	1.8	1'212'950	529'467	602	
Costa Rica	101	0.3	101			
Côte d'Ivoire	58	0.004	58			
Croatia	11'048	2.1	11'048			
Cyprus	621	1.9	621			
Czech Republic	41'685	3.1	41'685			
Congo D.R.	603	0.01	603			
Denmark	93'147	6.8	83'917	9'230		
Ecuador	274	0.04	242	32	135	
Egypt	8'946	0.3	8'946			
Estonia	47'609	12.9	47'609			
Ethiopia	4'493	0.04	4'493			
Finland	78'202	8.0	78'202			
France	369'040	4.1	369'040			
Germany	410'000	6.7				
Greece	36'361	4.9	36'361			
Hungary	43'839	1.9	33'019	10'820		
Iceland	64	2.1	51	13		
India	40'000	0.04	40'000		1'219	427
Indonesia	81	0.001	81			
Ireland	3'921	1.5	3'921			
Israel	797	1.3	797			
Italy	296'445	9.8	296'445			7
Japan	3'360	0.2	3'360		0	
Jordan	6	0.01	6			
Kazakhstan	64'118	0.4	64'118		649	
Kenya	490	0.02	490			
Kosovo	170		170			
Kyrgyzstan	296	0.1	207	90		

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Lao P.D.R.	3'717	0.4	3'717			
Latvia	61'276	8.1	61'276			
Lebanon	28	0.1	28			
Liechtenstein	129		124	5		
Lithuania	101'894	7.3	76'931	24'963		
Luxembourg	1'528	6.0	1'528			
Madagascar	777	0.05	777			
Mali	310	0.01	310			
Malta	2		2			
Mexico	5'414	0.1	5'414			
Moldova	5'911	0.6	5'645	266	2'320	
Montenegro	99	4.8	99			
Morocco	454	0.01	334	120		
Netherlands	4'483	2.6	4'088	395		
New Zealand					0	5'648
North Macedonia	1'546	1.0	1'546			
Norway	7'354	2.6	6'636	717		
Pakistan	30'864	0.2	30'508	356		492
Palestine	30	0.2	30			
Paraguay	43'798	2.4	39'028	4'770		
Peru	8'828	0.7	4'696	4'132	1'877	8'762
Poland	160'856	2.2	126'442	34'414		
Portugal	12'194	5.6	12'194			
Romania	130'930	2.3	93'004	37'831		25'688
Russian Federation	26'685	0.1	26'685		40	
Rwanda	516	0.1	516			
Saudi Arabia	714	0.3	480	234		
Senegal	268	0.01	268			
Serbia	4'474	0.3	4'474		870	
Slovakia	21'330	2.8	21'330			
Slovenia	2'563	2.5	2'103	460		
South Africa	586	0.02	525	62	45	
Spain	261'924	4.3	195'356	66'568		
Sri Lanka	12	0.001	12			
Sudan	8'582	0.1	8'582			
Sweden	109'459	11.0	109'459			10'501
Switzerland	17'226	12.2				
Taiwan	5'100	1.8	5'100			
Tanzania	4'842	0.1	4'842			
Thailand	41'312	0.3				
Togo	1'252	0.1	1'252			
Tunisia	689	0.1	689			
Türkiye	103'259	0.9	60'075	43'184	49'419	48'500
Uganda	23	0.001	23			
Ukraine	129'578	1.1	109'415		77'318	
United Arab Emirates	0	0.03		0		9
United Kingdom	50'300	1.6	46'900	3'400	6'523	
United States of America	405'742	0.8	405'742		1'678	
Uruguay	181	0.02	181			
Viet Nam	16'637	0.2	16'626	11		5
Zambia	90	0.01	90		26	
Total	5'730'109	0.8	4'325'470	780'069	157'964	280'227

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333.

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16.4.2 Citrus fruit

Table 49: Citrus fruit: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	1	0.06		1		
Argentina	5'379	4.13	5'379		61	5'527
Bahrain	0.002	0.002	0.002	0		
Benin	2	0.03	2			
Bolivia	0.1	0.0002	0.1			
Brazil					6'118	
Burkina Faso	88	36.36	88			
Canada		0.00				19
Chile	281	1.08	281		2'176	236
China	12'891	0.40	6'875	6'016		
Colombia	139	0.11	139		6'265	91
Costa Rica	79	0.54	79			
Côte d'Ivoire	7	0.06	7			
Croatia	16	0.76	16			
Cyprus	65	2.14	65			
Dominican Republic	80	0.16	80		1'046	24
Ecuador	693	1.86	569	123		
Egypt	1'303	0.62	1'303		1'675	11
France	722	15.43	722			
French Guiana (France)	26		18	8		
French Polynesia	5	5.15	5			
Georgia	5	0.03	5			
Ghana	630	2.49	597	32	16	
Greece	2'136	4.68	2'136			
Guadeloupe (France)	11		6	5		
Guatemala	935	3.86	935		239	23
Honduras						32
Iran (Islamic Republic of)	183	0.14	183		4	
Israel	261	1.05	253	9	75	
Italy	26'708	18.41	26'708			41
Japan					0.05	
Jordan	8	0.12	8			
Kenya	0.06	0.0002	0.06			
Lao P.D.R.	10	0.08	10			
Lebanon	24	0.21	22	2		
Madagascar	2'900	17.74	2'900			
Malta	0.25	0.00	0.25			
Martinique (France)	4		4	0		
Mexico	28'560	4.21	28'560			12'872
Morocco	1'705	1.31	1'640	66	1'281	
Nicaragua	56	0.23	56			
Palestine	1	0.05	1			
Paraguay	17'577		4'985	12'592		
Peru	648	0.75	463	186	3'279	88
Poland						39
Portugal	392	1.82	392			
Réunion (France)	70		62	8		
Senegal	1	0.02	1			
South Africa	1'601	1.46	1'247	355	10'465	
Spain	25'775	8.65	20'063	5'712		4
Sri Lanka	11	0.07	11		2	
Tanzania, United Republic of	623	1.16	618	4		
Togo	3	0.08	3			
Tunisia	194	0.44	194		77	
Türkiye	616	0.35	336	280	144	
United Arab Emirates	0.1	0.02		0		
United States of America	5'477	2.12	5'477		80	
Total	138'899	1.32	113'503	25'398	33'003	19'008

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333. Blank cells: No data available.

16.4.3 Cocoa beans

Table 50: Cocoa: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]
Belize	440		440		20
Bolivia (Plurinational State of)	4'603		3'748	856	45
Brazil					40
Cameroon	1'011	0.2	1'011		
Colombia	243	0.1	218	25	23
Congo, Republic of	2'854	4.1	2'854		
Costa Rica	941	15.2	941		27
Côte d'Ivoire	5'476	0.1	5'468	9	430
Democratic Republic of the Congo	84'070		84'070		8'061
Dominica	2'907	26.9	2'816		
Dominican Republic	113'535		98'889	14'646	17'356
Ecuador	12'638	2.5	10'107	2'531	1'876
Ghana	22'702	1.1	22'678	24	164
Grenada	159	25.1	159		8
Guatemala					59
Haiti	3'233		3'233		300
Honduras	1'722	28.5	1'702	20	2
India					12
Indonesia	24	0.002	24		1
Israel					13
Liberia	7'247	6.0	7'247		25
Madagascar	4'719	28.2	4'719		1'330
Mexico	1'200	2.3	1'200		15
Nicaragua	4'044	26.5	3'433	611	226
Panama					273
Papua New Guinea	3'485	3.3		0	25
Peru	41'955	23.7	29'928	12'026	6'673
Philippines	147	0.5	147		
Saint Lucia	57		57		
Sao Tome and Principe	7'077	23.1	7'077		2'455
Sierra Leone	164'975		164'975		11'674
Sri Lanka	1'220		1'220		1
Tanzania, United Republic of	3'748	19.3	3'748	0	122
Timor-Leste	19	1.1	19		
Togo	1'640	13.2	1'631	9	81
Uganda	10'722	16.2	10'722		4'705
Total	508'814	4.3	474'481	30'756	56'116

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333. Blank cells: No data available.

I.6.4.4 Coffee

Table 51: Coffee: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania						2
Austria						3
Bolivia	3'877	14.9	2'851	1'026	638	137
Brazil					1'740	2'501
Burundi	1'221	6.5	1'221		58	58
Cameroon	351	0.6	351			39
Canada						4'167
Chile					34	
China	5'332	16.6	2'887	2'446		
Colombia	3'059	0.4	3'042	17	3'358	8'641
Congo, Republic of	2'854	27.9	2'854			11
Costa Rica	442	0.5	442		1	510
Croatia						1
Cuba	2'807	14.9	2'807		187	
Congo D.R.	17'442	11.7	17'442		3'759	154
Denmark						0
Dominican Republic	1'305	2.4	799	506	11	55
Ecuador	2'415	8.1	1'950	466	223	7
El Salvador	1'776	1.4	1'776		277	212
Ethiopia	346'816	46.8	346'639	177	6'351	3'989
France						414
Germany						563
Greece						6
Guatemala	16'875	4.6	13'475	3'400	1'605	6'657
Haiti						27
Honduras	93'056	36.0	92'556	500	44'805	27'003
Hong Kong						2
India	2'600	0.6	2'600		4'089	1'257
Indonesia	22'602	1.8	22'544	59	1'351	5'308
Italy						148
Jamaica	15	0.1	15			0
Jordan						7
Kenya	8'092	7.4	8'092		185	404
Kosovo						17
Lao P.D.R.	4'212	4.7	4'212		983	19
Madagascar	691	0.8	691			
Mexico	102'140	15.8	102'140		7'990	6'836
Myanmar	142	1.1	142			
Nepal	503	27.9	503		18	
Netherlands						103
Nicaragua	19'516	11.9	17'876	1'639	3'907	7'538
Papua New Guinea	1'451	3.8			1'270	767
Peru	116'415	27.5	86'847	29'568	37'984	21'440
Rwanda	1'960	5.0	1'960		483	139
Serbia						35
Sierra Leone	8'989		8'989		57	
Spain						1
Sri Lanka	13	0.2	13			
Sweden						18
Switzerland						268
Tanzania	37'846	14.4	37'745	101	5'581	133
Thailand	5'417	16.7				0
Timor-Leste	31'429		31'429		18	595
Togo	111	0.3	111			
Türkiye	0			0		24
Uganda	35'139	4.8	3'022	217	4'949	949
United Kingdom					0	0

Annex > Global data > Crops > Dry Pulses

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
United States of America	196	6.9	196			
Venezuela	22	0.01	22			
Viet Nam	150	0.02	150			154
Yemen						8
Total	899'280	7.4	817'362	39'906	131'910	101'460

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333. Blank cells: No data available.

1.6.4.5 Dry pulses

Table 52: Dry pulses: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Argentina	2'764	0.4	2'764		313	790
Austria	13'356	71.6				
Bahrain	0	0.01		0		
Belarus	20	0.01	20			
Belgium	660	11.0	660			
Bolivia	1'940	1.9	1'928	13		
Bosnia and Herzegovina	24	0.3	24			
Bulgaria	3'928	15.6	3'928			
Burkina Faso	367	0.02	367			
Cameroon	53	0.01	53			
Canada	30'004	0.9	30'004		1'895	4'626
Chile	77	0.4	77			
China					11'548	
Costa Rica	10	0.05	10			
Croatia	181	9.5	181			
Czech Republic	5'652	15.1	5'652			
Denmark	17'954	67.5	16'254	1'700		
Ecuador	133	0.4	107	26		
Egypt					915	
Estonia	5'970	12.1	5'970			
Ethiopia	7'045	0.4	7'045			
Finland	8'638	21.1	8'638			
France	182'960	49.3	182'960			
Germany	66'000	34.7				
Greece	17'165	13.1	17'165			
Hungary	3'498	28.7	3'498			
India	2'600	0.01	2'600		578	2'535
Ireland	592	4.3	592			
Israel	12	0.1	12			
Italy	39'068	34.6	39'068			13
Kazakhstan	14'858	2.7	14'858		1'043	
Kenya	234	0.01	234			
Kyrgyzstan	350	0.3	350			
Latvia	7'744	17.7	7'744			
Lebanon	0	0.002	0			
Lithuania	23'220	17.3	18'530	4'690		
Luxembourg	187	49.2	187			
Madagascar	900	0.8	900			
Malta	0		0			
Mauritius	0		0			
Mexico	9'137	0.6	9'137		298	957
Moldova	1'210	3.8	1'203	8	1'137	

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Morocco		0.0			6	
Namibia	38	0.2	38			
Netherlands	276	6.7	264	12		
Nicaragua	8	0.003	8			
Norway	16	0.3	5	10		
Pakistan	605	0.1	605			
Paraguay	50	0.05	50			
Peru	99	0.1	86	13		39
Poland	46'473	14.8	30'407	16'066		
Portugal	7'031	37.1	7'031			
Romania	6'152	5.7	4'615	1'537		
Russian Federation	3'240	0.1	3'240		9'667	21'151
Serbia	1'182	5.1	1'182		22	
Slovakia	2'743	23.0	2'743			
Slovenia	78	8.0	68	10		
South Africa	155	0.2	155			
South Sudan						
Spain	49'903	13.6	38'961	10'942		
Sweden	14'728	34.8	14'728			
Switzerland	1'626	34.3				
Thailand					0	
Tunisia	11	0.01	11			
Türkiye	18'153	2.0	9'122	9'031	32'786	1'044
Ukraine					1'095	
United Kingdom					48	
United States of America	24'015	2.0	24'015		194	
Uzbekistan	305	1.4	305	0	198	
Zimbabwe	3	0.002	3			
Total	645'403	0.7	520'363	44'058	61'744	31'156

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333.

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1.6.4.6 Fruit: Temperate Fruit

Table 53: Temperate fruit: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	10	0.1	3	7		
Algeria	41	0.0	41			
Argentina	5'296	7.8	5'296		7'326	22'747
Austria	2'400	28.3				
Belarus	17		17			
Belgium	655	3.8	655			
Bolivia	2		2			
Bosnia and Herzegovina	2		2	0		
Bulgaria	4'940	17.6	4'940			
Canada	846	3.8	846			262
Chile	3'262	2.5	3'262		1'170	6'515
China	111'007	1.8	75'800	35'207		69
Croatia	1'786	14.1	1'786			
Cyprus	146	9.2	146			
Czech Republic	2'486	18.3	2'486			
Congo D.R.	1'168		1'168			
Denmark	785	33.0	621	164		
Ecuador	158	2.5	148	10		
Estonia	452	69.5	452			

Annex > Global data > Crops > Temperate Fruit

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Finland	55	7.7				
France	26'769	26.8	26'769			
French Guiana (France)	196		184	12		
Georgia	500	1.0	500			
Germany	8'150	16.5				
Greece	1'009	1.0	1'009			
Guadeloupe (France)	24		20	4		
Hungary	9'763	15.3	5'103	4'660		
Iran (Islamic Republic of)	43		43			
Ireland	60	8.5	60			
Israel	185	1.9	173	12		
Italy	22'727	11.4	22'727			
Jordan	6	0.1	6			
Latvia	1'208	28.1	1'208			
Lebanon	50	0.2	45	4		
Liechtenstein	2		2			
Lithuania	1'183	8.9	819	364		
Luxembourg	60	46.2	60			
Madagascar	1'985	19.8	1'985			
Malta	0		0			
Martinique (France)	101		90	11		
Mexico	279	0.3	279			
Moldova	85	0.1	84	1		
Montenegro	409	28.9	409			
Morocco	2'791	2.7	2'528	263		
Namibia	79		79			
Netherlands	664	3.8	572	92		
New Zealand					1'266	14'304
North Macedonia	171	0.4	171			
Norway	243	10.8	216	27		
Peru	2		0	2		
Poland	11'663	5.7	9'749	1'914		
Portugal	1'315	3.3	1'315			
Réunion (France)	33		31	2		
Romania	9'541	7.2	6'100	3'441		
Russian Federation	110		110			
Rwanda	274		274			
Serbia	2'091	1.5	2'091		2'531	
Slovakia	462	14.6	462			
Slovenia	400	13.3	360	40		
South Africa	74	0.1	74			
Spain	9'044	4.8	7'061	1'983		
Sweden	296	18.0	296			
Switzerland	1'037	15.2				
Tunisia	306	0.6	306			
Türkiye	12'202	2.3	8'080	4'122	112	
Ukraine					4'877	
United States of America	18'146	7.7	18'146			
Uzbekistan	537	0.2	537	0		
Venezuela	1'000	28.1	1'000			
Total	282'735	2.4	218'862	52'342	17'282	43'898

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333.
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I.6.4.7 Fruit: Tropical and subtropical fruit

Table 54: Tropical and subtropical fruit: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	4	0.2	3	1		
Algeria	2'005	0.9	2'005		1'908	76
Argentina	123	1.2	123		541	
Azerbaijan	419	3.0	375	44		
Bahrain	0			0		
Benin	8		8		80	
Bolivia	2		2			
Brazil					823	23
Bulgaria	26	65.0	26			
Burkina Faso	22'074		22'066	8	3'713	
Burundi	7		7			
Cameroon	136		136		247	
Canada	1	28.0	1			
Chile	246	0.6	246		1'434	
China	9'474	0.3	4'975	4'499		
Colombia	7'345	1.2	7'254	91	65'080	93'845
Cook Islands	9	8.2	9			
Costa Rica	5'352	5.2	5'352		3'101	421
Côte d'Ivoire	3'156	0.4	3'137	19	33'247	
Croatia	84	14.7	84			
Cyprus	133	15.6	133			
Congo D.R.	7		7			
Dominican Republic	34'403	20.9	34'118	286	173'008	2'908
Ecuador	31'059	9.7	25'006	6'054	330'975	305'905
Egypt	1'802	0.8	1'802		170	
El Salvador	50	1.2	50			
Ethiopia	18'939	10.7	18'939			
France	1'305	6.7	1'305			
French Guiana (France)	241		200	41		
French Polynesia	170	36.2	170			
Georgia	200		200			
Ghana	1'838	0.4	1'838		21'025	
Greece	956	5.7	956			
Guadeloupe (France)	274		212	62		
Guatemala	1'588	1.2	1'588			498
Honduras	3					
India					7	2
Indonesia	288		288	0	7	
Iran (Islamic Republic of)	652	0.3	588	64	806	
Israel	935	3.2	823	112	2'004	7
Italy	9'147	23.4	9'147			
Jordan	144	2.5	144		107	
Kenya	21'932	11.7	21'896	37	12'909	
Kuwait	7	0.2	7			
Lebanon	42	0.9	41	1		
Madagascar	20'011	8.8	20'011		0	
Mali	1'922	1.5	1'922		62	
Malta						
Martinique (France)	136		129	8		
Mauritius	2	0.3	2			
Mayotte	74		15	59		
Mexico	27'594	4.3	27'594		2'706	210'103
Montenegro	3	0.2	3			
Morocco	617	0.4	617		2'521	
Mozambique	4		4			
New Zealand					4'853	
Nicaragua	1'802	7.7	1'773	29		22

Annex > Global data > Crops > Grapes

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
North Macedonia	10	22.7	10			
Pakistan	1'655	0.5	1'453	202	816	
Palestine	33	1.1	32	1	465	
Peru	14'383	4.3	10'366	4'017	96'853	43'213
Philippines	1'470	0.1	1'470			
Portugal	1'525	10.3	1'525			
Réunion (France)	608		436	171		
Rwanda	58		58		17	
Saudi Arabia	6'025	3.6	3'978	2'047	286	17
Senegal	919	4.1	919		921	
Serbia	2		2		7	
Slovenia	50	31.3	30	20		
South Africa	1'839	3.9	1'753	86	43	
Spain	10'432	13.6	7'039	3'393		
Sri Lanka	5'472	6.0	5'472		23	
Suriname	52	4.1	52			
Syrian Arab Republic						
Tanzania, United Republic of	2'816	0.4	2'816		1'330	
Thailand					7	
Togo	527	23.5	527		461	
Tunisia	23'806	22.3	23'806		6'181	63
Türkiye	17'894	20.5	15'118	2'777	172	181
Uganda	354		255		158	
United Arab Emirates					282	
United Kingdom					0	
United States of America	4'111	10.7	4'111		163	
Viet Nam	32'899	10.0	32'845	53		63
Total	355'691	1.3	331'409	24'180	769'519	657'349

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333.

1.6.4.8 Grapes

Table 55: Grapes: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]
Albania	17	0.2	8	9	
Andorra	2			2	
Argentina	10'236	4.9	10'236		241
Australia	5'783	5.2	888		
Austria	10'432	22.6			
Belgium	145	29.6	145		
Bulgaria	2'563	8.9	2'563		
Canada	1'342	11.4	1'328	14	
Chile	5'818	3.3	5'818		110
China	17'344	2.7	13'565	3'779	
Croatia	904	4.2	904		
Cyprus	222	3.3	222		
Czech Republic	752	4.7	752		
Denmark	69		69		
Egypt	2'157	2.7	2'157		67
Estonia	5		5		
France	131'790	17.4	131'790		
Georgia	1'179	1.5	659	521	
Germany	15'300	15.2			
Greece	4'716	4.5	4'716		

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]
Hungary	2'231	3.7	1'181	1'050	
Iran (Islamic Republic of)	105	0.1	105		141
Israel	55	0.7	52	2	
Italy	102'925	14.6	102'925		
Jordan	4	0.1	4		
Lebanon	476	7.4	459	17	
Liechtenstein	5		5		
Lithuania	2		1	2	
Luxembourg	71	5.7	71		
Madagascar	8	0.3	8		
Malta	9	2.1	9		
Mexico	5'164	16.2	5'164		
Moldova	104	0.1	44	60	
Netherlands	14	8.2	12	2	
North Macedonia	43	0.2	43		
Peru	196	0.5	120	75	40
Poland	240	26.7	196	44	
Portugal	4'146	2.4	4'146		
Romania	2'401	1.4	1'759	642	
Serbia	152	0.8	152		
Slovakia	274	3.5	274		
Slovenia	855	5.6	625	230	
South Africa	3'935	3.4	3'278	656	3'895
Spain	166'286	17.8	120'109	46'177	
Sweden	42	52.5	42		
Switzerland	2'710	19.9			
Türkiye	7'530	2.0	5'189	2'341	14'055
United States of America	17'111	4.7	17'111		177
Uzbekistan					158
Total	527'871	7.8	438'913	55'620	18'884

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333.

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1.6.4.9 Oilseeds

Table 56: Oilseeds: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Argentina	15'590	0.1	15'590		207	124'619
Austria	51'309	31.0				
Bahrain	0			0		
Belarus	194		194		66	
Belgium	373	4.4	373			
Benin	27'238	6.0	27'238		1'140	277
Bolivia	8'312	0.5	6'923	1'389	1'356	450
Bosnia and Herzegovina	29	0.2	29		3'057	
Brazil					47	
Bulgaria	5'327	0.6	5'327			8'483
Burkina Faso	42'020	3.6	42'006	14	7'701	
Cameroon	268		268			
Canada	52'758	0.5	52'758		675	19'838
Chile					131	
China	581'829	2.5	427'153	154'676	3'265	506
Colombia	2		2			
Costa Rica	13	0.1	13			
Côte d'Ivoire	6'438	2.6	6'438		227	

Annex > Global data > Crops > Oilseeds

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Croatia	6'430	3.7	6'430			
Czech Republic	2'506	0.6	2'506			
Denmark	6'534	4.5	6'534			
Ecuador	829	3.0	513	317	7	
Egypt	1'740	1.4	1'740		5'844	
Estonia	8'933	11.7	8'933			
Ethiopia	47'889	6.1	47'889			
Finland	5'627	22.4	5'627			
France	129'900	6.1	129'900			
Germany	42'900	4.2				
Ghana	86'000	17.7	86'000	0	75	42'177
Greece	5'485	5.2	5'485			
Hungary	15'073	1.5	8'733	6'340		
Iceland	2		2			
Ireland	87'300	0.3	87'300		6'127	2'913
Ireland	25	0.2	25			
Israel	729	9.8	561	168	0	
Italy	35'764	9.0	35'764			128
Japan					1	
Kazakhstan	50'586	1.5	50'708	123	11'565	929
Kenya	1'142	0.7	1'142		100	
Lao P.D.R.	1		1			
Latvia	1'383	0.9	1'383			
Lebanon					0	
Liechtenstein	14		14			
Lithuania	8'341	2.8	5'550	2'791		
Luxembourg	52	1.8	52			
Madagascar	10'441	11.7	10'441			335
Malawi	20'600	3.1	20'600			
Mali	16'018	2.6	16'018		1'117	
Mexico	18'620	6.2	18'620		76	2'357
Moldova	4'517	0.9	4'283	234	4'167	
Namibia	7	0.5	7			
Netherlands	104	3.1	103	1		880
Nicaragua	3'929	6.8	3'913	16	48	31
Nigeria	97'524	1.7	97'524		114	470
North Macedonia	26	0.4	26			
Pakistan					3'209	379
Paraguay	18'960	0.5	12'121	6'840	6'381	1'513
Peru	547	9.7	435	112	56	
Poland	5'495	0.5	3'236	2'259		2
Portugal	80	1.0	80			
Romania	101'375	5.8	84'130	21'131		
Russian Federation	8'538		8'538		3'021	18'409
Rwanda	74	0.1	74		20	
Senegal	117		117			
Serbia	2'087	0.4	2'087		4'597	
Slovakia	4'496	1.7	4'496			200
Slovenia	353	3.6	293	60		
South Africa	33		33		20	
Spain	15'505	2.1	11'432	4'073		
Sri Lanka	7		4			
Sudan	6'153	0.1	6'153			
Sweden	7'834	7.8	7'834			
Switzerland	2'522	7.2				
Syrian Arab Republic					50	
Taiwan						19
Tanzania, United Republic of	16'928	0.5	14'775	2'153	263	
Togo	288'787	96.9	288'784	4	98'766	26'660
Tunisia	326	2.4	326			
Türkiye	4'060	0.3	1'803	2'257	3'411	36'586
Uganda	24'620	2.7	4'001		9'989	261

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Ukraine	135'238	1.7	126'607	8'631	51'476	4'723
United Kingdom					37	
United States of America	118'896	0.3	118'896		162	
Uruguay	527		527			1'788
Uzbekistan					0	
Venezuela	1'490	2.0	1'490			
Total	2'273'717	0.9	1'946'908	208'317	228'570	295'029

Source: FiBL survey 2025 based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333. Blank cells: no data.

1.6.4.9 Olives

Table 57: Olives: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	140	0.3	67	73
Algeria	416	0.1	416	
Argentina	9'897	7.6	9'897	
Chile	2'048	9.7	2'048	
China	1'557		636	921
Croatia	1'868	9.2	1'868	
Cyprus	1'472	13.2	1'472	
Egypt	1'103	1.0	1'103	
France	6'236	35.4	6'236	
Greece	58'840	6.5	58'840	
Iran (Islamic Republic of)	13	0.1	13	
Israel	498	1.5	492	6
Italy	215'791	18.8	215'791	
Jordan	360	0.6	360	
Lebanon	275	0.4	275	
Malta	14		14	
Mexico	365	3.8	365	
Montenegro	4	2.1	4	
Morocco	3'020	0.3	2'472	548
North Macedonia	1		1	
Palestine	4'559	8.4	4'436	123
Portugal	23'825	6.3	23'825	
Slovenia	296	20.8	246	50
South Africa	8		8	
Spain	292'868	11.2	213'837	79'031
Tunisia	153'233	8.5	153'233	
Türkiye	46'525	5.2	32'559	13'966
United States of America	666	4.8	666	
Total	825'896	7.5	731'179	94'717

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333. Blank cells: No data available.

1.6.4.10 Vegetables

Table 58: Vegetables: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	1		1	0		
Argentina	1'477	0.9	1'477		2'923	485
Australia	3'902	5.7	3'902			
Austria	5'066	27.8				
Bahrain	0	0.1		0		
Belarus	0		0			
Belgium	3'855	5.6	3'855			
Benin	2		2			
Bolivia	0		0			
Bosnia and Herzegovina	9		9		1	
Bulgaria	877	3.4	877			
Burkina Faso					238	
Cambodia	5		5			
Cameroon	4		4			
Canada	13'083	17.3	13'063	19		45'540
Chile	1'271	2.3	1'271			190
China	68'600	0.3	34'300	34'299	571	181
Costa Rica	246	2.1	246			257
Côte d'Ivoire	1		1			
Croatia	251	3.0	251			
Cyprus	109	4.1	109			
Czech Republic	275	2.4	275			
Denmark	4'941	41.3	4'626	315		
Ecuador	836	1.1	731	104		16
Egypt	25'796	4.5	25'796		5'385	22
Estonia	203	9.9	203			
Finland	642	5.2	642			
France	38'018	14.2	38'018			838
French Guiana (France)	65		65	1		
Georgia	3		0	3	9	
Germany	17'381	14.1				
Ghana	25		25			
Greece	2'490	3.4	2'490			
Guadeloupe (France)	138		115	23		
Hungary	4'988	5.9	3'008	1'980		
Iceland	7	8.8	7			
India					218	
Indonesia	12		12			
Iran (Islamic Republic of)	1'912	0.5	1'912			
Iraq	53					
Ireland	280	6.3	280			
Israel	774	1.2	748	26	1'038	821
Italy	50'349	12.2	50'349			
Jordan	12		12			
Kenya	11'387	4.8	11'387		75	
Kosovo	3		3			
Kyrgyzstan	7		6	1		
Lao P.D.R.	11		11			
Latvia	389	4.7	389			
Lebanon	37	0.1	37			
Liechtenstein	23		23			
Lithuania	4'825	38.7	3'561	1'264		
Luxembourg	133	73.9	133			
Madagascar	1'336	2.7	1'336			
Malaysia	235	0.3	235			
Malta	3	0.3	3			
Martinique (France)	109		103	6		
Mauritius	1		1			

Annex > Global data > Crops > Vegetables

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Mayotte	74		22	52		
Mexico	55'057	8.0	55'057			318'666
Moldova	208	0.5	203	5		
Mongolia	188	1.5		187		
Montenegro	1	0.1	1			
Morocco	404	0.3	404		2'797	
Mozambique	30		30			
Myanmar	50		50			
Namibia	8		8		34	
Nepal	118		10			
Netherlands	10'405	10.6	10'295	110		1'613
Nicaragua	2		2			
Nigeria	12		12			
North Macedonia	28	0.1	28			
Norway	905	12.2	844	61		
Oman	2		2			
Palestine	0		0			
Peru	767	0.3	472	295	68	4'846
Philippines	4		4			
Poland	21'639	14.3	20'733	906		
Portugal	7'325	12.4	7'325			10
Réunion (France)	386		350	35		
Romania	1'042	0.8	713	329		
Russian Federation					21	
Saudi Arabia	270	0.4	130	140		
Senegal	126	0.1	126		832	
Serbia	84	0.1	84			
Singapore	15	1.2	15			
Slovakia	1'063	14.5	1'063			
Slovenia	302	4.2	252	50		
South Africa	223	0.2	198	25	2'341	
Spain	30'226	7.9	24'843	5'383		572
Sri Lanka	11		11			
Sweden	1'876	12.7	1'876			
Switzerland	3'404	24.0				
Taiwan	8'099	6.0	8'099			
Tanzania, United Republic of	475	0.1	475		20	
Thailand	11'859	2.8			0	
Tonga	108	1.4	108			
Tunisia	116	0.1	116			
Türkiye	11'631	1.6	6'909	4'721	79	
Uganda	254	0.2	254		0	
United Arab Emirates	58	0.8		58		
United Kingdom	8'600	8.1	7'900	700	532	
United States of America	97'127	14.9	97'127		1	
Viet Nam	11'662	1.1	11'647	15		
Total	552'702	1.0	463'714	51'116	17'183	376'975

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333.

2 Tables by Regions

2.1 Organic Agriculture in Africa: Tables

Table 59: Africa: Key indicators 2023

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Algeria	3'350	0.01%	6	1'986
Angola		0.0%		0
Benin	60'275	1.5%	5'895	10'859
Burkina Faso	286'167	2.2%	35'625	18'076
Burundi	1'751	0.1%	669	115
Cameroon	2'831	0.03%	14	305
Chad		0.0%	2'960	416
Comoros	262	0.2%	1	13
Congo, Republic of	5'708	0.1%	2	11
Côte d'Ivoire	104'228	0.4%	4'803	38'170
Congo, D.R.	108'297	0.3%	118'203	12'020
Egypt	116'000	2.9%	984	35'570
Eswatini	2'878	0.2%		
Ethiopia	438'745	1.1%	121'552	46'074
Ghana	125'469	1.0%	914	69'261
Guinea		0.0%		27
Guinea-Bissau		0.0%		584
Kenya	173'120	0.6%	63'230	15'607
Lesotho	0	0.0%	2	705
Liberia	7'247	0.4%	2	25
Madagascar	170'279	0.4%	62'024	6'190
Malawi	20'734	0.3%	2	
Mali	21'276	0.05%	12'419	3'827
Mauritius	13	0.01%	9	46
Mayotte	170	0.8%	47	
Morocco	13'325	0.04%	449	17'033
Mozambique	16'804	0.04%	69	6'315
Namibia	659	0.002%	3	114
Niger	705	0.002%	1	400
Nigeria	157'019	0.2%	1'151	17'591
Réunion (France)	2'397	5.0%	539	
Rwanda	5'421	0.3%	9	834
Sao Tome and Principe	9'281	22.1%	4	6'082
Senegal	3'385	0.04%	2	2'035
Seychelles		0.0%	1	10
Sierra Leone	214'930	5.4%	5'518	14'816
Somalia		0.0%	1	19
South Africa	39'807	0.04%	1'089	22'353
Sudan	40'325	0.04%	2	3'429
Tanzania, United Republic of	223'067	0.6%	61'580	8'235
Togo	322'347	8.4%	41'233	174'864
Tunisia	196'222	2.0%	7'798	64'966
Uganda	505'308	3.5%	404'246	37'897
Zambia	3'167	0.01%	6'771	1'427
Zimbabwe	351	0.002%	11'836	253
Total	3'403'319	0.3%	971'665	638'560

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 333.

Table 60: Africa: Land use in organic agriculture 2023

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		67'536
Arable land crops	Cereals	33'649
	Dry pulses	8'807
	Fallow land	22'902
	Fallow land, crop rotation	689
	Flowers / ornamental plants	7
	Fresh vegetables	40'659
	Industrial crops	154
	Medicinal / aromatic plants	68'903
	Oilseeds	694'363
	Plants harvested green	8'405
	Root crops	17'848
	Strawberries	789
	Sugarcane	7'695
	Textile crops	339'462
	Tobacco	53
	Arable crops, other	130'492
Arable land crops total		1'374'877
Other agricultural land		7'963
Permanent crops	Berries	70
	Citrus fruit	9'126
	Cocoa	316'242
	Coconut	13'255
	Coffee	461'511
	Fruit, other	1'450
	Fruit, temperate	6'751
	Fruit, tropical / subtropical	125'460
	Grapes	6'100
	Medicinal / aromatic plants	97'865
	Nurseries	3
	Nuts	344'160
	Oleaginous fruits	8'150
	Olives	157'780
	Tea/mate, etc.	19'035
	Permanent crops, other	369'515
Permanent crops total		1'936'482
Permanent grassland		16'460
Total		3'403'317

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 61: Africa: Land use in organic agriculture 2023 by country

Country	Arable land crops	Permanent crops	Permanent grassland
Algeria	887	2'462	
Benin	34'307	21'394	
Burkina Faso	160'805	125'362	
Burundi	491	1'260	
Cameroon	1'120	1'698	
Comoros	87	175	
Congo, Republic of		5'708	
Côte d'Ivoire	6'619	96'750	
Congo, D.R.	651	102'711	
Egypt	96'484	19'003	459

Annex > Regions > Africa

Country	Arable land crops	Permanent crops	Permanent grassland
Eswatini	68	2'737	73
Ethiopia	61'238	368'467	
Ghana	87'875	37'417	
Kenya	14'519	148'735	
Liberia		7'247	
Madagascar	39'689	129'123	17
Malawi	20'605	129	
Mali	17'815	3'462	
Mauritius	7	6	
Mayotte	83	79	
Morocco	4'926	8'399	
Mozambique	13'103	3'505	
Namibia	576	83	
Niger	705		
Nigeria	144'641	978	
Réunion (France)	637	726	404
Rwanda	599	4'822	
Sao Tome and Principe		9'281	
Senegal	581	2'774	
Sierra Leone		214'930	
South Africa	13'888	19'232	3'706
Sudan	39'374	951	
Tanzania, United Republic of	170'078	52'890	
Togo	298'723	12'433	
Tunisia	1'374	180'512	11'800
Uganda	141'948	350'976	
Zambia	90		
Zimbabwe	284	66	
Total	1'374'877	1'936'482	16'460

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 62: Africa: All organic areas 2023

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Algeria	3'350				3'350
Benin	60'275				60'275
Burkina Faso	286'167		248'621		534'788
Burundi	1'751				1'751
Cameroon	2'831				2'831
Chad			804'476		804'476
Comoros	262				262
Congo, Republic of	5'708				5'708
Côte d'Ivoire	104'228				104'228
Congo, D.R.	108'297				108'297
Egypt	116'000				116'000
Eswatini	2'878				2'878
Ethiopia	438'745				438'745
Ghana	125'469		12'575		138'044
Kenya	173'120		535'068		708'188
Lesotho			284'567		284'567
Liberia	7'247				7'247
Madagascar	170'279	1'458	694		172'430
Malawi	20'734				20'734

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Mali	21'276		14'795		36'071
Mauritius	13				13
Mayotte	170				170
Morocco	13'325		714'528		727'853
Mozambique	16'804		2'041'400		2'058'204
Namibia	659		312'108		312'767
Niger	705				705
Nigeria	157'019		58'495		215'514
Réunion (France)	2'397				2'397
Rwanda	5'421				5'421
Sao Tome and Principe	9'281				9'281
Senegal	3'385		15'258		18'643
Sierra Leone	214'930				214'930
Somalia			37'400		37'400
South Africa	39'806	137	204'685	4'086	248'714
Sudan	40'325		109'681		150'006
Tanzania, United Republic of	223'067	13	510		223'590
Togo	322'346				322'346
Tunisia	196'222	30'679			226'901
Uganda	505'308				505'308
Zambia	3'167		2'500'000		2'503'166
Zimbabwe	351		160		511
Total	3'403'317	32'287	7'895'019	4'086	11'334'710

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Please be aware that some countries may experience double counting of areas

Table 63: Africa: Use of wild collection areas 2023

Land use	Area [ha]
Bee pastures	2'502'749
Forest products	356'813
Marula, wild collection	160
Medicinal and aromatic plants, wild collection	203'555
Nuts, wild collection	838'950
Oil plants, wild collection	1'514
Permanent crops, wild collection, other	15'832
Rose hips, wild collection	282'800
Wild collection, other	3'693'401
Total	7'895'019

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 64: Africa: Organic exports to the EU and US by product group 2023

Product group	Export to EU and USA [MT]
Vegetable and animal oils and fats	197'095
Oilseeds	195'556
Fruit, tropical and subtropical	85'132
Cocoa	29'045
Coffee	27'299
Fruit, berries and nuts, prepared and preserved	18'999

Product group	Export to EU and USA [MT]
Citrus fruit	13'525
Fresh vegetables and melons	11'744
Root crops	9'991
Nuts	7'129
Sugar	6'641
Non-food products	6'460
Grapes	4'339
Processed and prepared fruits and vegetables	4'076
Vegetables, prepared and preserved	3'559
Seeds and seedlings	3'007
Permanent crops, other	2'898
Medicinal and aromatic plants	1'781
Aquaculture products	1'247
Tea/mate, etc.	1'057
Beverages	1'005
Coconut	986
Dry pulses and protein crops for the production of grain	921
Spices and aromatics	884
Medicinal and aromatic plants, permanent	860
Berries	838
Hot beverages (Coffee, tea and cacao etc.)	746
Food additives	632
Bee products	263
Grain mill products	200
Cocoa, chocolate and sugar confectionery, no details	164
Feedstuffs	108
Microbial fats and oils	96
Prepared food, no details	87
Cereals	71
Fish and fish products	49
Fruit	44
Noodles, couscous, etc.	11
Other food products and product groups	9
Flowers and ornamental plants	3
Cocoa, chocolate and sugar confectionery	2
Yeast and other single cell micro-organisms	1
Seaweed	1
Sugarcane	0
Milk and dairy products	0
Total	638'560

Source: TRACES/European Commission/GATS USDA 2024, compiled by FiBL. For detailed data sources, see annex, page 333. Please be aware that some countries may experience double counting of areas.

2.2 Organic Agriculture in Asia: Tables

Table 65: Asia: Organic agricultural land, organic share of total agricultural land, number of organic producers and organic exports to the EU and US 2023

Country/Territory	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Afghanistan	28	0.0001%		1
Armenia	466	0.03%	22	132
Azerbaijan	11'483	0.2%	4	1'463
Bahrain	1	0.01%	1	

Country/Territory	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Bangladesh	1'400	0.01%		44
Bhutan	3'704	0.7%	2'760	
Cambodia	35'543	0.6%	7'710	10'317
China	3'420'457	0.7%	15'676	206'321
Georgia	5'871	0.2%	659	761
Hong Kong	0	0.0%		264
India	4'475'837	2.5%	2'358'267	157'982
Indonesia	71'947	0.1%	23'346	13'490
Iran (Islamic Republic of)	15'412	0.03%	327	1'436
Iraq	63	0.001%		
Israel	5'091	0.8%	336	13'110
Japan	18'837	0.4%	3'945	4'006
Jordan	1'463	0.1%	19	116
Kazakhstan	191'283	0.1%	27	25'918
Kuwait	33	0.02%	1	
Kyrgyzstan	19'114	0.2%	1'003	929
Lao People's Democratic Republic	27'025	1.3%	1'619	11'047
Lebanon	1'398	0.2%	49	77
Malaysia	1'386	0.02%	35	34
Maldives		0.0%		223
Mongolia	957	0.001%	180	
Myanmar	7'118	0.1%	65	27
Nepal	16'974	0.4%	133	304
Oman	7	0.0005%	1	0
Pakistan	107'400	0.3%	944	55'767
Palestine	5'162	1.3%	1'478	623
Philippines	187'425	1.5%	14'402	16'403
Republic of Korea	37'825	2.4%	24'072	120
Saudi Arabia	23'410	0.01%	540	305
Singapore	15	2.2%		10
Sri Lanka	69'812	2.5%	21'344	37'171
Syrian Arab Republic		0.0%		143
Taiwan	17'561	2.2%	5'218	205
Tajikistan	64'416	1.3%	5	
Thailand	77'633	0.3%	31'623	30'461
Timor-Leste	31'447	9.2%	4	614
United Arab Emirates	5'419	1.4%	152	826
Uzbekistan	2'493	0.01%	25	547
Viet Nam	174'580	1.4%	62'436	14'408
Yemen		0.0%		9
Total	9'137'495	0.6%	2'578'428	605'614

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 333.

Table 66: Asia: Land use in organic agriculture 2023

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		3'950'485
Arable land crops	Cereals	1'974'177
	Dry pulses	18'730
	Fallow land	7'581
	Fresh vegetables	103'997
	Hops	33
	Industrial crops	29'137

Land use	Crop group	Area [ha]
	Medicinal / aromatic plants	142'709
	Mushrooms and truffles	38'780
	Oilseeds	720'451
	Plants harvested green	240'204
	Root crops	42'586
	Strawberries	458
	Sugarcane	7'590
	Textile crops	671'767
	Arable crops, other	42'233
Arable land crops total		4'040'433
Other agricultural land		11'213
Permanent crops	Berries	548
	Citrus fruit	13'554
	Cocoa	1'597
	Coconut	276'606
	Coffee	72'005
	Fruit	13'968
	Fruit, temperate	127'542
	Fruit, tropical and subtropical	43'901
	Fruit/nuts/berries	2'597
	Grapes	19'651
	Medicinal and aromatic plants	119'048
	Nuts	152'265
	Olives	5'982
	Tea/mate, etc.	217'750
	Permanent crops, other	4'156
Permanent crops total		1'129'179
Permanent grassland		6'185
Total		9'137'495

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 67: Asia: Land use in organic agriculture 2023 by country

Country/Territory	Agricultural land and crops, no details [ha]	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Afghanistan	0	28			
Armenia	466				
Azerbaijan	0	10'103	1'380		
Bahrain	0	0	0		
Bangladesh	1'400				
Bhutan	3'704				
Cambodia	23	29'113	6'402		4
China	0	2'857'704	562'753		
Georgia	114	82	5'625	50	
India	3'823'723	646'513	5'601		
Indonesia	9'033	128	62'786		
Iran (Islamic Republic of)	68	8'602	6'743		
Iraq	0	53	10		
Israel	0	2'725	1'975		392
Japan	0	9'239	2'054	4'038	3'506
Jordan	922	19	522		
Kazakhstan	22'770	168'329			184
Kuwait	25	1	7		
Kyrgyzstan	0	19'114			

Country/Territory	Agricultural land and crops, no details [ha]	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Lao P.D.R.	2'337	20'174	4'515		
Lebanon	72	151	869	307	
Malaysia	0	235	1'151		
Mongolia	715	242	0		
Myanmar	70	110	6'937		
Nepal	459	5'031	11'485		
Oman	4	2			
Pakistan	16'002	89'431	1'966		
Palestine	0	385	4'771		6
Philippines	1'905	795	184'726		
Republic of Korea	37'825				
Saudi Arabia	0	5'246	18'164		
Singapore	0	15			
Sri Lanka	1'716	39	68'056		
Taiwan	0	13'199	2'473		1'889
Tajikistan	0	64'416			
Thailand	0	59'061	12'278	1'063	5'231
Timor-Leste	0		31'447		
United Arab Emirates	5'358	61	0		
Uzbekistan	0	1'651	842		
Viet Nam	21'772	28'437	123'644	727	
Total	3'950'485	4'040'433	1'129'179	6'185	11'213

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 68: Asia: All organic areas 2023

Country/Territory	Agriculture [ha]	Aquaculture [ha]	Wild collection [ha]	Total [ha]
Afghanistan	28			28
Armenia	466		414	880
Azerbaijan	11'483			11'483
Bahrain	1			1
Bangladesh	1'400			1'400
Bhutan	3'704		2'223	5'927
Cambodia	35'543		4	35'547
China	3'420'457		2'884'673	6'305'130
Georgia	5'871		270	6'141
India	4'475'837		2'850'156	7'325'993
Indonesia	71'947	855	144'566	217'367
Iran (Islamic Republic of)	15'413			15'413
Iraq	63			63
Israel	5'091			5'091
Japan	18'837			18'837
Jordan	1'463			1'463
Kazakhstan	191'283		30	191'313
Kuwait	33			33
Kyrgyzstan	19'114		154'042	173'156
Lao P.D.R.	27'025			27'025
Lebanon	1'399		240	1'639
Malaysia	1'386		1'115	2'501
Mongolia	957			957
Myanmar	7'118	20		7'138
Nepal	16'974		87'214	104'188

Country/Territory	Agriculture [ha]	Aquaculture [ha]	Wild collection [ha]	Total [ha]
Oman	7		2'200	2'207
Pakistan	107'400			107'400
Palestine	5'162			5'162
Philippines	187'425			187'425
Republic of Korea	37'825			37'825
Saudi Arabia	23'410			23'410
Singapore	15			15
Sri Lanka	69'812		16	69'828
Taiwan	17'561			17'561
Tajikistan	64'416			64'416
Thailand	77'633	88	91'071	168'792
Timor-Leste	31'447			31'447
United Arab Emirates	5'419		2	5'421
Uzbekistan	2'493		1'178	3'671
Viet Nam	174'580	19'976		194'555
Total	9'137'495	20'938	6'219'414	15'377'847

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333. Please be aware that some countries may experience double counting of areas

Table 69: Asia: Use of wild collection areas 2023

Land use	Area [ha]
Medicinal and aromatic plants, wild collection	3'400
Mushrooms, wild collection	1'115
Nuts, wild collection	100'042
Wild collection, no details	6'114'858
Total	6'219'414

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 70: Asia: Organic retail sales in 2023

Country/Territory	Retail sales [Million €]	Per capita [€/person]
China	12'648	9
Japan	1'623	13
Republic of Korea	485	11
India	374	0
Saudi Arabia	325	10
Singapore	16	3
Mongolia	1	0.2
Bhutan	0.03	0.04
Total	15'471	3.3

Source: FiBL survey 2025, based on information from the private sector and governments. Please note that not all countries provided updated data. For detailed data sources, see annex, page 333.

Table 71: Asia: Organic exports to the EU and US by product group 2023

Product group	Exports to EU/and USA [MT]
Vegetable and animal oils and fats	210'580
Grain mill products	125'600
Sugar	56'557
Oilseeds	32'261
Prepared food, no details	25'366
Fruit, berries and nuts, prepared and preserved	19'734
Processed and prepared fruits and vegetables	17'657
Medicinal and aromatic plants	16'237
Dry pulses and protein crops for the production of grain	15'902
Coffee	13'809
Nuts	7'951
Tea/mate, etc.	7'900
Bee products	6'870
Root crops	5'625
Coconut	5'272
Fruit, tropical and subtropical	4'901
Non-food products	4'587
Seeds and seedlings	3'711
Cereals	3'404
Fresh vegetables and melons	2'839
Medicinal and aromatic plants, permanent	2'227
Vegetables, prepared and preserved	1'927
Feedstuffs	1'883
Spices and aromatics	1'826
Noodles, couscous, etc.	1'643
Food and non-food products	1'503
Aquaculture products	1'225

Product group	Exports to EU/and USA [MT]
Yeast and other single cell micro-organisms	903
Other food products and product groups	823
Protein concentrates	818
Textile crops	695
Cocoa, chocolate and sugar confectionery	645
Berries	405
Mushrooms and truffles	402
Bread and bakery products	310
Grapes	300
Beverages	257
Food additives	226
Wild collection, other	223
Meat and meat products	120
Mushrooms, prepared and preserved	92
Citrus fruit	82
Microbial fats and oils	77
Fruit of temperate climate zones	69
Seaweed	41
Hot beverages (Coffee, tea and cacao etc.)	31
Cocoa	27
Fish and fish products	21
Cocoa, chocolate and sugar confectionery, no details	17
Fruit	16
Manufactured products, other	13
Permanent crops, other	5
Other products	0.2
Milk and dairy products	0.04
Total	605'614

Source: GATS/USDA and TRACES/European Commission 2024

2.3 Organic Agriculture in Europe and the European Union: Tables

Table 72: Europe: Organic agricultural land by country 2023

Please note that not for all countries 2023 data were available.

Country	Organic agr. land [ha]	Organic share [%]	Change 2022-2023 [%]	Change 2014-2023 [%]	Change 2022-2023 [ha]
Albania	736	0.1%	0.4%	11.2%	3
Andorra	2	0.01%	0.0%	-47.3%	0
Austria	701'161	27.3%	-0.7%	27.2%	-4'674
Belarus	5'387	0.1%	-12.5%		-772
Belgium	102'359	7.5%	-1.0%	53.5%	-1'078
Bosnia and Herzegovina	2'495	0.1%	0.0%	607.1%	0
Bulgaria	147'798	2.9%	33.8%	98.8%	37'357
Channel Islands	180	2.1%	0.0%	0.0%	0

Annex > Regions > Europe and the European Union

Country	Organic agr. land [ha]	Organic share [%]	Change 2022-2023 [%]	Change 2014-2023 [%]	Change 2022-2023 [ha]
Croatia	119'873	8.0%	-7.3%	139.5%	-9'501
Cyprus	10'470	7.7%	35.1%	169.3%	2'721
Czech Republic	595'190	16.9%	5.8%	25.9%	32'795
Denmark	303'430	11.6%	1.1%	83.0%	3'373
Estonia	225'256	22.9%	-2.5%	44.8%	-5'755
Faroe Islands	251	8.4%	0.0%	-0.8%	0
Finland	311'498	13.7%	-8.2%	46.5%	-27'962
France	2'767'447	9.6%	-3.8%	147.3%	-108'605
Germany	1'888'999	11.3%	1.6%	80.3%	29'157
Greece	924'853	17.6%	0.0%	154.9%	0
Hungary	320'251	6.4%	-0.1%	156.5%	-266
Iceland	6'440	0.3%	0.0%	-42.4%	0
Ireland	178'653	4.0%	86.7%	244.4%	82'952
Italy	2'455'586	18.7%	4.5%	76.9%	105'706
Kosovo	505	0.1%	-25.4%	342.6%	-172
Latvia	297'111	15.1%	-5.0%	46.0%	-15'709
Liechtenstein	1'612	44.6%	3.7%	42.1%	57
Lithuania	249'122	8.5%	-6.1%	51.5%	-16'243
Luxembourg	8'262	6.3%	0.1%	84.0%	7
Malta	66	0.6%	0.0%	97.8%	0
Moldova	41'480	1.8%	45.0%	87.7%	12'864
Montenegro	4'272	1.7%	7.7%	29.9%	306
Netherlands	87'416	4.8%	9.2%	77.8%	7'330
North Macedonia	8'322	0.7%	-4.6%	164.5%	-402
Norway	46'063	4.7%	0.1%	-7.6%	56
Poland	636'021	4.4%	14.7%	-3.3%	81'389
Portugal	860'878	21.7%	13.3%	305.4%	100'901
Romania	693'998	5.1%	7.7%	139.9%	49'478
Russian Federation	96'576	0.04%	-48.4%	-60.7%	-90'445
Serbia	29'002	0.8%	15.8%	203.8%	3'967
Slovakia	261'060	13.7%	3.1%	44.8%	7'904
Slovenia	54'603	11.3%	2.6%	32.4%	1'401
Spain	2'991'881	12.2%	11.8%	74.9%	316'550
Sweden	549'941	18.3%	-7.9%	9.6%	-47'263
Switzerland	190'007	18.2%	2.0%	41.8%	3'672
Türkiye	312'010	0.8%	0.5%	-36.6%	1'426
Ukraine	471'176	1.1%	78.7%	17.6%	207'557
United Kingdom	497'900	2.8%	1.3%	-4.5%	6'600
Total Europe	19'448'567	3.9%	4.1%	65.5%	766'098
Total EU	17'743'183	10.9%	3.6%	79.9%	621'965

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources. For detailed data sources, see annex, page 333.

Table 73: Europe: Conversion status of organic agricultural land 2023

Please note that not for all countries and for all indicators 2023 data were available.

County	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Albania	736	621	115
Andorra	2	2	
Austria	701'161		
Belarus	5'387	2'277	3'110
Belgium	102'359		
Bosnia and Herzegovina	2'495	2'082	413

Annex › Regions › Europe and the European Union

Country	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Bulgaria	147'798	60'236	87'562
Channel Islands	180	180	
Croatia	119'873	91'042	28'831
Cyprus	10'470	6'891	3'579
Czech Republic	595'190	530'510	64'679
Denmark	303'430	277'046	26'384
Estonia	225'256	207'844	17'412
Faroe Islands	251	251	
Finland	311'498	287'253	24'245
France	2'767'447	2'461'874	305'573
Germany	1'888'999		
Greece	924'853	600'613	324'240
Hungary	320'251	237'579	82'672
Iceland	6'440	4'502	1'938
Ireland	178'653	75'002	103'651
Italy	2'455'586	1'927'224	528'362
Kosovo	505	485	20
Latvia	297'111	260'468	36'643
Liechtenstein	1'612	1'574	38
Lithuania	249'122	194'306	54'816
Luxembourg	8'262	7'904	357
Malta	66	65	1
Moldova	41'480	39'710	1'771
Montenegro	4'272	4'027	245
Netherlands	87'416	71'281	5'093
North Macedonia	8'322	5'842	2'480
Norway	46'063	41'092	4'971
Poland	636'021	456'489	179'532
Portugal	860'878	501'664	359'214
Romania	693'998	344'541	234'177
Russian Federation	96'576	91'821	4'755
Serbia	29'002	18'086	10'916
Slovakia	261'060	228'537	32'522
Slovenia	54'603	46'195	8'408
Spain	2'991'881	2'446'324	326'193
Sweden	549'941	518'048	31'893
Switzerland	190'007		
Türkiye	312'010	194'375	117'635
Ukraine	471'176	390'923	80'253
United Kingdom	497'900	462'200	35'700
Europe	19'448'600	13'091'219	3'129'134
European Union	17'743'183	11'838'937	2'866'040

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources. For detailed data sources, see annex, page 333.

Table 74: Europe: Land use in organic agriculture by country 2023

Please note that not for all countries 2023 data were available.

Country	Arable land [ha]	Permanent grassland [ha]	Permanent crops [ha]	Total [ha]
Albania	550	187		736
Andorra		2		2
Austria	292'680	14'906	393'575	701'161
Belarus	1'463	62		1'524
Belgium	39'284	1'599	61'476	102'359
Bosnia and Herzegovina	1'532	159		1'691
Bulgaria	55'401	22'505	69'892	147'798
Channel Islands				
Croatia	40'782	15'864	63'227	119'873
Cyprus	6'542	3'613	316	10'471
Czech Republic	86'594	4'241	418'595	509'430
Denmark	243'005	2'628	57'797	303'430
Estonia	131'289	2'485	91'483	225'257
Faroe Islands			251	251
Finland	269'889	759		270'648
France	1'515'728	239'584	1'012'135	2'767'447
Germany	868'000	26'076	955'000	1'849'076
Greece	382'153	209'981	332'720	924'853
Hungary	121'750	21'163	177'338	320'251
Iceland	218	27	6'194	6'440
Ireland	12'038	170	166'446	178'654
Italy	1'166'953	559'368	729'266	2'455'587
Kosovo	481	24		505
Latvia	156'432	4'310	136'370	297'112
Liechtenstein	268	8	1'331	1'607
Lithuania	141'519	5'566	102'036	249'122
Luxembourg	3'449	169	4'643	8'261
Malta	41	24		65
Moldova	12'581	3'696		16'277
Montenegro	321	640	3'312	4'273
Netherlands	31'261	968	44'146	76'375
North Macedonia	3'458	879	3'986	8'323
Norway	37'331	360	7'723	45'413
Poland	431'516	27'504	90'423	549'443
Portugal	189'899	236'643	434'336	860'878
Romania	338'942	21'233	214'657	574'832
Russian Federation	40'454	110		40'564
Serbia	111'271	5'867	4'252	21'389
Slovakia	86'793	2'397	171'869	261'059
Slovenia	7'303	3'597	40'926	51'826
Spain	633'631	878'470	1'479'397	2'991'498
Sweden	420'491	718	128'732	549'941
Switzerland	48'363	4'458	134'178	187'000
Türkiye	175'889	136'121		312'010
Ukraine	264'816			264'816
United Kingdom	173'600	2'200	307'100	482'900
Total Europe	8'445'961	2'461'340	7'845'128	19'448'600
Total EU	7'673'366	2'306'540	7'376'802	17'743'183

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources. For detailed data sources, see annex, page 333. The total includes other agricultural areas for which no land use details were available.

Table 75: Europe: Organic agricultural land and wild collection areas by country 2023

Please note that not for all countries 2023 data were available.

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	736	469'325	470'061
Andorra	2		2
Austria	701'161		701'161
Belarus	5'387		5'387
Belgium	102'359		102'359
Bosnia and Herzegovina	2'495	195'668	198'163
Bulgaria	147'798	232'200	379'998
Channel Islands	180		180
Croatia	119'873		119'873
Cyprus	10'471		10'471
Czech Republic	595'189		595'189
Denmark	303'430		303'430
Estonia	225'257		225'257
Faroe Islands	251		251
Finland	311'498	6'900'000	7211'498
France	2'767'447		2'767'447
Germany	1'888'999		1'888'999
Greece	924'853		924'853
Hungary	320'251		320'251
Iceland	6'440	454'382	460'822
Ireland	178'654		178'654
Italy	2'455'587		2'455'587
Kosovo	505	249'127	249'632
Latvia	297'112		297'112
Liechtenstein	1'612		1'612
Lithuania	249'122		249'122
Luxembourg	8'261		8'261
Malta	66		66
Moldova	41'480	6'531	48'011
Montenegro	4'273		4'273
Netherlands	87'416		87'416
North Macedonia	8'323	556'600	564'923
Norway	46'063		46'063
Poland	636'021		636'021
Portugal	860'878		860'878
Romania	693'998		693'998
Russian Federation	96'576	819'501	916'076
Serbia	29'002	610'000	639'002
Slovakia	261'059		261'059
Slovenia	54'603		54'603
Spain	2'991'881		2'991'881
Sweden	549'941		549'941
Switzerland	190'007		190'007
Türkiye	312'010	30'538	342'548
Ukraine	471'176	93'000	564'176
United Kingdom	497'900		497'900
Europe	19'457'600	10'616'871	30'074'477
European Union	17'743'183	7'132'200	24'875'387

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources. For detailed data sources, see annex, page 333. Please be aware that some countries may experience double counting of areas

Table 76: Europe: Organic producers, processors, and importers by country 2023

Please note that not for all countries 2023 data were available.

Country	Producers	Processors	Importers	Exporters
Albania	150	59	5	14
Andorra		3		
Austria	26'251	2'374	86	1
Belarus	33	15		6
Belgium	2'638	1'881	365	192
Bosnia and Herzegovina	90	51		20
Bulgaria	4'438	383	105	96
Croatia	6'274	421	8	
Cyprus	1'515	91	39	1
Czech Republic	5'347	942	340	159
Denmark	3'960	983	126	169
Estonia	1'968	170	34	27
Faroe Islands	1	1		
Finland	4'236	417	53	41
France	61'167	20'141	722	
Germany	36'680	22'382	1'971	1'571
Greece	58'691	1'727	52	71
Hungary	5'983	468	49	0
Iceland	30	20	8	3
Ireland	4'076	194	212	65
Italy	84'191	24'800	573	1'127
Kosovo	44	43		
Latvia	3'379	395	10	0
Liechtenstein	40			
Lithuania	2'596	174	1	
Luxembourg	161	83	5	0
Malta	25	7	34	
Moldova	141	25	3	11
Monaco		35		
Montenegro	483	25	5	0
Netherlands	2'110	1'222	529	134
North Macedonia	888	17	5	3
Norway	3'913	459	127	17
Poland	22'354	1'202	331	424
Portugal	16'028	1'245	65	42
Romania	12'598	203	25	25
Russian Federation	48	26		
Serbia	525	146	68	64
Slovakia	1'189	161	63	36
Slovenia	3'864	214	40	1
Spain	57'980	6'149	594	681
Sweden	4'878	950	295	35
Switzerland	7'896	1'375	717	17
Türkiye	42'189	1'070	74	471
Ukraine	383	70		
United Kingdom	3'193	1'814	216	
Europe	494'624	94'633	7'955	5'524
European Union	434'577	89'379	6'727	4'898

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources. For detailed data sources, see annex, page 333.

*Total number includes data for countries with less than three operators.

Table 77: Europe and European Union: Organic retail sales 2023*

Country	Data year**	Retail sales [Million €]	€/person [€]	1-year growth [%]	Organic share [%]	Food-service [Million €]
Austria	2023	2'657	292	6.5	11.0	230.0
Belgium	2023	1'153	101	9.0	4.0	
Bulgaria	2022	38	6		1.0	
Croatia	2018	99	24		2.2	
Czech Republic	2022	274	25		1.7	8.8
Denmark	2022			-0.4		
	2023	2'159	362		11.8	451.6
Estonia	2023	111	81	13.0	4.6	
Finland	2023	352	63	-6.0	1.9	
France	2023	12'081	176	0.0	5.6	786.0
Germany	2023	16'080	191	5.0	6.3	
Greece	2023	60	6	-10.0		
Hungary	2015	30	3		0.3	
Ireland	2020				2.7	
	2023	165	33	-0.6		
Italy	2021					1'200.0
	2023	3'882	66	5.2	3.5	
Latvia	2017	51	6		1.5	
Lithuania	2017	51	18		1.0	5.0
Luxembourg	2021					6.0
	2023	151	228	-7.7	7.20	
Netherlands	2019					330.3
	2023	1'615	91	12.5	4.6	
Norway	2023	389	80			25.0
Poland	2022	310	8		0.6	
Portugal	2011	21	2		0.2	
Romania	2016	41	2		0.2	
Russian Federation	2018	183	1			
Slovenia	2009					0.1
	2013	49	27		1.8	
Spain	2021				2.5	
	2023	2'748	57	3.5		153.0
Sweden	2023	2'310	220	-4.7	7.80	672.0
Switzerland	2023	4'193	468	5.2	11.6	
Türkiye	2014	46	1			
Ukraine	2023	25	1			
United Kingdom	2023	3'426	51	2.4	1.6	229.3
Europe		54'749	66	3.0		
European Union		46'487	104	2.9		

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333.

*Note on the table

- ›Where no published data exists, best estimates from experts were used.
- ›New data were not available for all countries. Therefore, in some cases, earlier data are shown.
- ›Values published in national currencies were converted to euros using the 2023 average annual 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.
- ** «Data year» refers to the year from which the data are. As stated above, not all countries provided up-to-date data.

Table 78: Europe: International Trade 2023

Country	EU imports [MT]*	Exports to EU [MT]**	Exports to USA [MT]**	Exports [Million €]***	Imports [Million €]***
Albania		1'263	9		
Austria	28'379		1'231	80	
Belarus		167			
Bosnia and Herzegovina		6'935		9	
Bulgaria	14'847		8'647		
Croatia	1'059		22	6	66
Cyprus	252		4		
Czech Republic	25'552			200	218
Denmark			0	609	865
Estonia	326			33	14
European Union undefined			470		
Finland	18'921			73	19
France	240'582		2'162	1'058	2'350
Germany	432'897		980		
Greece			1'964		
Hungary	992		1	40	36
Ireland	4'099				
Italy	180'388		25'319	4'735	
Kosovo		408	30		
Latvia	3'359			51	
Lithuania	8'346		2	45	
Luxembourg	47				
Malta	9				
Moldova		12'191	13	15	
Montenegro		25			
Netherlands			5'429	1'725	
North Macedonia		258	6		
Poland	29'285		41		
Portugal	4'305		1'218		
Romania	9'026		25'691	350	70
Russian Federation		13'955	72'187	4	30
Serbia		16'959	118		1
Slovakia			200		
Slovenia	22'419		8	0	46
Spain			13'957	515	219
Sweden	190'023		12'480		
Switzerland			268		
Türkiye	10'233	150'012	111'131	20	
Ukraine		173'720	9'608	134	
United Kingdom	393'666	56'471	157	194	
Europe	1'619'014	432'363	293'354		
European Union	1'215'115		99'356		

Source: European Commission/TRACES, USDA/GATS 2024, FiBL survey based on national data sources

*Imports in metric tons (MT) to the European Union based on Traces/European Commission data

** Exports to the European Union (from European non-EU countries only, based on TRACES/European Commission) and to the US (based on GATS/USDA; all European countries). Please note that the US import data do not cover all products.

*** Export and import values (to and from ALL countries) are based on national data sources.

Table 79: European Union: EU organic imports by EU Member State 2018-2023 (EU 27)

Country	2018 [MT]	2019 [MT]	2020 [MT]	2021 [MT]	2022 [MT]	2023 [MT]
Austria	35'921	28'379	30'766	35'345	51'097	55'855
Belgium	177'960	371'912	303'002	276'833	268'462	273'369
Bulgaria	12'281	14'847	15'331	18'870	9'218	6'292
Croatia	3'559	1'059	540	964	804	795
Cyprus	211	252	140	226	39	109
Czech Republic	29'493	19'956	25'021	30'067	33'862	16'593
Denmark	127'413	120'705	82'116	61'737	64'114	70'000
Estonia	475	326	313	292	220	142
Finland	14'988	18'921	18'421	16'037	14'730	11'694
France	213'625	240'582	274'620	271'608	277'414	228'623
Germany	427'616	432'897	491'719	517'183	449'303	416'784
Greece	6'368	8'270	10'180	13'061	11'870	12'077
Hungary	2'062	992	991	1'169	725	497
Ireland	19'476	4'099	61'779	83'517	55'918	54'677
Italy	185'803	180'388	236'106	224'956	177'762	248'302
Latvia	52	3'359	520	415	9'024	586
Lithuania	2'798	8'346	33'144	34'800	20'959	14'771
Luxembourg	488	47	65	44	22	14
Malta	1	9	60	51	86	71
Netherlands	953'038	1'037'553	857'361	945'125	988'989	795'383
Poland	19'330	29'285	36'077	37'382	32'905	27'458
Portugal	7'239	4'305	7'070	6'810	7'088	4'214
Romania	8'817	9'026	10'889	9'939	4'415	5'893
Slovakia	455	617	252	407	413	522
Slovenia	17'461	22'419	6'458	9'357	6'688	6'609
Spain	78'818	100'140	112'184	93'338	87'802	88'997
Sweden	167'269	190'023	178'978	183'413	153'328	139'042
United Kingdom	520'047	393'666				
Total	3'230'675	3'242'382	2'794'103	2'872'948	2'726'258	2'479'319

Source: TRACES/European Commission 2024

2.4 Organic Agriculture in Latin America and the Caribbean: Tables

Table 80: Latin America and the Caribbean: Organic agricultural land, organic share of total agricultural land, number of organic producers and organic exports to the EU and US 2023

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Argentina	4'048'203	3.4%	1'368	278'667
Bahamas	49	0.4%		
Belize	440	0.2%	385	44
Bolivia (Plurinational State of)	117'368	0.3%	12'517	19'062
Brazil	1'023'089	0.4%	24'853	219'767
British Virgin Islands	26	0.4%		
Chile	287'905	2.7%	994	39'900
Colombia	29'322	0.1%	38	276'829
Costa Rica	10'962	0.6%	2'626	28'548
Cuba	4'936	0.1%	9	2'236
Dominica	2'907	11.6%	258	17
Dominican Republic	185'959	7.7%	16'840	195'377

Annex > Regions > Latin America

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Ecuador	72'601	1.3%	9'589	665'483
El Salvador	1'959	0.2%	371	489
Falkland Islands (Malvinas)	31'937	2.8%	3	
French Guiana (France)	4'213	13.0%	108	
Grenada	176	2.2%	2	8
Guadeloupe (France)	1'309	2.6%	247	
Guatemala	125'333	2.7%	149	11'685
Guyana		0.0%		430
Haiti	3'233	0.2%	3'434	327
Honduras	95'436	2.7%	15'876	73'703
Jamaica	17	0.004%	4	13
Martinique (France)	945	3.0%	142	
Mexico	277'333	0.3%	49'940	728'632
Nicaragua	30'880	0.6%	8'792	12'759
Panama	5'333	0.2%	50	294
Paraguay	163'836	1.0%	7'285	63'061
Peru	247'216	1.0%	93'167	302'826
Saint Lucia	57	0.6%	1	
Suriname	52	0.1%	1	43
Uruguay	3'572'286	25.4%	38	4'975
Venezuela (Bolivarian Republic of)	2'518	0.01%	8	25
Total	10'347'833	1.6%	249'095	2'925'201

Source: CIAO and FiBL survey 2025, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 333.

Table 81: Latin America and the Caribbean: Land use in organic agriculture 2023

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		1'286'985
Arable land crops		1'282'461
	Cereals	182'461
	Dry pulses	14'218
	Fallow land	3'492
	Flowers / ornamental plants	40
	Fresh vegetables	59'968
	Industrial crops	258
	Medicinal / aromatic plants	10'487
	Mushrooms and truffles	10
	Oilseeds	68'819
	Plants harvested green	2'839
	Root crops	1'468
	Strawberries	1'910
	Sugarcane	74'286
	Textile crops	7'350
	Tobacco	55
	Arable crops, other	190'326
Arable land crops total		617'986
Other agricultural land		2'803
Permanent crops		25'122
	Berries	54'467
	Citrus fruit	187'678
	Cocoa	2'873
	Coconut	363'721
	Coffee	83
	Flowers / ornamental plants	

Land use	Crop group	Area [ha]
	Fruit, temperate	10'320
	Fruit, tropical and subtropical	124'652
	Fruit/nuts/berries	190
	Grapes	21'414
	Medicinal aromatic plants	1'410
	Nuts	5'252
	Olives	12'310
	Tea/mate, etc.	2'614
	Permanent crops, other	41'719
Permanent crops total		853'823
Permanent grassland		7'120'297
Total		10'347'833

Source: CIAO and FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 82: Latin America and the Caribbean: Land use in organic agriculture 2023 by country

Country	Agricultural land and crops, no details [ha]	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Argentina	224'458	57'765	34'394	3'731'586	
Bahamas			49		
Belize			440		
Bolivia		108'828	8'540		
Brazil	1'023'089				
British Virgin Islands	26				
Chile		6'442	33'028	248'435	
Colombia	51	6'422	22'505	345	
Costa Rica	720	3'320	6'922		
Cuba		2'129	2'807		
Dominica			2'907		
Dominican Republic		33'785	151'030		1'144
Ecuador		6'017	66'345		239
El Salvador	83		1'877		
Falkland Islands (Malvinas)				31'937	
French Guiana (France)		207	478	2'645	883
Grenada	17		159		
Guadeloupe (France)	3	659	309	81	257
Guatemala		105'935	19'398		
Haiti			3'233		
Honduras			95'436		
Jamaica	2		15		
Martinique (France)		332	241	93	279
Mexico		96'645	180'688		
Nicaragua		4'667	26'210	3	
Panama	5'333				
Paraguay	32'751	110'408	20'677		
Peru		72'222	174'994		
Saint Lucia			57		
Suriname			52		
Uruguay	357	715	11	3'571'203	
Venezuela	6	1'490	1'022		
Total	1'286'895	617'986	853'823	7'586'327	2'803

Source: CIAO and FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 83: Latin America and the Caribbean: All organic areas 2023

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Argentina	4'048'203			4'324		4'052'527
Bahamas	49					49
Belize	440					440
Bolivia	1'173'67			2'231'038		2'348'406
Brazil	1'023'089			2'266'820		3'289'909
British Virgin Islands	26					26
Chile	287'905			86'723		374'628
Colombia	29'323					29'323
Costa Rica	10'962					10'962
Cuba	4'936					4'936
Dominica	2'907					2'907
Dominican Republic	185'959				1'294	187'253
Ecuador	72'601	631	40'007	2'438		1'15'678
El Salvador	1'960					1'960
Falkland Islands (Malvinas)	31'937					31'937
French Guiana (France)	4'213					4'213
Grenada	176					176
Guadeloupe (France)	1'309					1'309
Guatemala	125'333			86'679		212'012
Guyana				55'449		55'449
Haiti	3'233					3'233
Honduras	95'436					95'436
Jamaica	17			7		24
Martinique (France)	945					945
Mexico	277'333			417'986	59'541	754'860
Nicaragua	30'880					30'880
Panama	5'333					5'333
Paraguay	163'836				1'468'975	1'632'811
Peru	247'216			189'239		436'455
Saint Lucia	57					57
Suriname	52					52
Uruguay	3'572'286					3'572'286
Venezuela	2'518					2'518
Total	10'347'833	631	40'007	5'340'704	1'529'810	17'258'986

Source: CIAO and FiBL survey 2025 based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 84: Latin America and the Caribbean: Use of wild collection areas 2023

Land use/products	Area [ha]
Apiculture	5'568
Forest products	2'000
Fruit, wild collection	4'542
Medicinal and aromatic plants, wild collection	8'983
Mushrooms, wild collection	85
Nuts, wild collection	3'589'654
Palmito, wild collection	56'699
Seaweed	70
Wild collection, no details	1'671'293
Total	5'338'894

Source: CIAO and FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 85: Latin America and the Caribbean: Organic exports to the EU and US by product group 2023

Product group	Exports to EU and US [MT]	Product group	Exports to EU and US [MT]
Fruit, tropical and subtropical	1'331'459	Fruit	577
Sugar	417'138	Other food products and product groups	512
Fresh vegetables and melons	330'347	Non edible animal products	501
Coffee	184'320	Non-food products	426
Oilseeds	139'113	Medicinal and aromatic plants, permanent	253
Berries	97'197	Meat and meat products	221
Cereals	78'410	Food additives	185
Citrus fruit	38'078	Feedstuffs	181
Fruit of temperate climate zones	37'759	Spices and aromatics	147
Fruit, berries and nuts, prepared and preserved	37'200	Root crops	88
Medicinal and aromatic plants	34'851	Noodles, couscous, etc.	76
Processed and prepared fruits and vegetables	32'693	Prepared food, no details	72
Bee products	31'387	Wild collection, other	69
Strawberries	30'668	Fish and fish products	63
Vegetable and animal oils and fats	27'345	Cocoa, chocolate and sugar confectionery, no details	56
Cocoa	26'969	Seeds and seedlings	49
Grain mill products	11'997	Manufactured products, other	41
Grapes	11'062	Yeast and other single cell micro-organisms	36
Beverages	10'760	Food and non-food products	24
Vegetables, prepared and preserved	3'798	Tea/mate, etc.	22
Dry pulses and protein crops for the production of grain	2'398	Inputs	22
Aquaculture products	2'390	Seaweed	11
Hot beverages (Coffee, tea and cacao etc.)	1'548	Protein concentrates	3
Cocoa, chocolate and sugar confectionery	1'376	Milk and dairy products	0.5
Nuts	1'302	Permanent crops, other	0.4
		Total	2'925'201

Source: GATS/USDA and TRACES/European Commission 2024. For detailed data sources, see annex, page 333.

2.5 Organic Agriculture in North America: Tables

Table 86: Northern America: Organic agricultural land, organic share of total agricultural land, number of organic producers and organic exports to the EU and US 2023

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Canada	1'288'514	2.3%	6'751	291'802
United States of America	2'060'741	0.5%	17'445	12'104
Total	3'349'255	0.7%	24'196	303'905

Source: USDA and COTA 2024; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 333.

Table 87: Northern America: Land use in organic agriculture 2023

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		886'244
Arable land crops	Cereals	691'660
	Dry pulses	54'019
	Flowers / ornamental plants	22
	Fresh vegetables	110'210
	Hops	668
	Industrial crops	193'066
	Medicinal / aromatic plants	229
	Oilseeds	171'654
	Plants harvested green	307'319
	Root crops	1'482
	Strawberries	94
	Textile crops	32'073
	Tobacco	1'783
	Arable crops, other	59'155
Arable land crops total		1'623'433
Other agricultural land		49'591
Permanent crops	Berries	19'986
	Citrus fruit	5'477
	Coffee	196
	Fruit	822
	Fruit, temperate	18'992
	Fruit, tropical and subtropical	4'112
	Fruit/nuts/berries	6
	Grapes	18'453
	Nurseries	649
	Nuts	13'195
	Olives	666
	Permanent crops, other	189'759
Permanent crops total		272'312
Permanent grassland		517'675
Total		3'349'255

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Table 88: Northern America: Land use in organic agriculture 2023 by country

Country	Agricultural land, no details [ha]	Arable land [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Canada	356'836	679'321	202'766		49'591
United States of America	529'408	944'112	69'546	517'675	
Total	886'244	1'623'433	272'312	517'675	49'591

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Table 89: Northern America: All organic areas 2023

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Canada	1'288'514	9'140	160	1'297'815
United States of America	2'060'741			2'060'741
Total	3'349'255	9'140	160	3'358'556

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Table 90: Northern America: Use of wild collection areas 2023

Land use	Area [ha]
Berries, wild collection	16
Wild collection, no details	144
Total	160

Source: USDA and COTA 2024. For detailed data sources, see annex, page 333.

Table 91: Northern America: Organic retail sales in 2023

Country	Retail sales, all [Million €]	Retail sales, all [€/person]
United States of America	59'003	171.8
Canada	4'917	122.6
Total	63'920	167.0

Source: OTA for USA and COTA for Canada 2024. For detailed data sources, see annex, page 333.

Table 92: Northern America: Organic exports to the EU and US by country (totals) 2023

Country	Export to USA [MT]	Export to EU [MT]	Export to EU and USA [MT]
Canada	269'331	22'471	291'802
United States of America		12'104	12'104
Total	269'331	34'575	303'905

Source: GATS/USDA and TRACES/European Commission 2024. For detailed data sources, see annex, page 333

Table 93: Northern America: Organic exports to the EU and US by commodity 2023

Product group	Exports to EU and USA [MT]	Product group	Exports to EU and USA [MT]
Cereals	127'223	Vegetable and animal oils and fats	28'435
Fresh vegetables and melons	45'540	Oilseeds	21'270
Root crops	33'417	Sugar	18'645

Product group	Exports to EU and USA [MT]	Product group	Exports to EU and USA [MT]
Fruit, berries and nuts, prepared and preserved	9'178	Seeds and seedlings	79
Dry pulses and protein crops for the production of grain	6'715	Prepared food, no details	64
Coffee	4'167	Feedstuffs	61
Vegetables, prepared and preserved	1'216	Strawberries	47
Bread and bakery products	1'030	Cocoa	33
Berries	1'019	Other food products and product groups	29
Processed and prepared fruits and vegetables	916	Protein concentrates	28
Grain mill products	897	Meat and meat products	10
Nuts	828	Food additives	9
Beverages	599	Bakery and farinaceous products	9
Tea/mate, etc.	550	Plants harvested green	8
Non-food products	266	Food and non-food products	5
Fruit of temperate climate zones	262	Mushrooms, prepared and preserved	4
Medicinal and aromatic plants	247	Other products	3.4
Grapes	177	Milk and dairy products	3.3
Fruit, tropical and subtropical	163	Permanent crops, other	2.8
Hot beverages (Coffee, tea and cacao etc.)	163	Fruit/nuts/berries	2
Hops	130	Yeast and other single cell micro-organisms	2
Bee products	126	Medicinal and aromatic plants, permanent	1
Seaweed	123	Noodles, couscous, etc.	1
Cocoa, chocolate and sugar confectionery, no details	105	Cocoa, chocolate and sugar confectionery	0.4
Citrus fruit	99	Spices and aromatics	0.1
		Total	303'905

Source: GATS/USDA and TRACES/European Commission 2024. For detailed data sources, see annex, page 333.

2.6 Organic Agriculture in Oceania: Tables

Table 94: Oceania: Key indicators 2023

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Australia	53'016'058	14.6%	1'635	983
Cook Islands	9	0.5%	16	
Fiji	12'868	4.1%	16	64
French Polynesia	4'499	9.3%	74	65
New Caledonia	22	0.0%		0
New Zealand	79'347	0.8%	685	41'215
Papua New Guinea	10'192	0.7%	10'203	2'062
Samoa	41'307	14.6%	1'857	82
Solomon Islands	7'596	6.3%	957	
Tonga	322	0.9%		
Vanuatu	6'431	3.4%	132	
Total	53'178'651	14.1%	15'575	44'472

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 333.

Tables: Oceania: Land use in organic agriculture 2023

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		563'644
Arable land crops	Cereals	41'293
	Flowers / ornamental plants	4
	Fresh vegetables	4'010
	Medicinal / aromatic plants	50
	Sugarcane	64
Arable land crops total		51'472
Other agricultural land		4'299
Permanent crops	Citrus fruit	5
	Cocoa	3'485
	Coconut	8'151
	Coffee	1'451
	Fruit	4'567
	Fruit, tropical and subtropical	179
	Grapes	5'783
	Medicinal / aromatic plants	134
	Permanent crops, other	18'316
Permanent crops total		42'071
Permanent grassland		52'540'881
Total		53'178'651

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 95: Oceania: Land use in organic agriculture 2023 by country

Country	Agricultural land, no details [ha]	Arable crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Australia	470'317	45'195	10'350	52'485'897	4'299
Cook Islands			9		
Fiji	12'868				
French Polynesia	244	118	4'137		
New Caledonia			22		
New Zealand		6'052	18'311	54'984	
Papua New Guinea	1'165		9'027		
Samoa	41'307				
Solomon Islands	7'596				
Tonga		108	215		
Vanuatu	6'431				
Total	563'644	51'472	42'071	52'540'881	4'299

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 96: Oceania: Organic retail sales 2023

Country	Retail sales [Million €]	Per capita [€/person]
Australia	1'338	51.5
New Zealand	172	33.6

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 333.

Table 97: Oceania: Organic exports to the EU and US by commodity 2023 (totals)

Country	Exports to EU and USA [MT]
Fruit of temperate climate zones	15'570
Beverages	15'484
Cereals	5'648
Fruit, tropical and subtropical	4'853
Coffee	2'036
Noodles, couscous, etc.	239
Fruit, berries and nuts, prepared and preserved	152
Processed and prepared fruits and vegetables	152
Bee products	102
Spices and aromatics	70.1
Medicinal and aromatic plants	55
Cocoa	25
Non-food products	21
Other food products and product groups	19
Vegetable and animal oils and fats	13
Hops	8
Medicinal and aromatic plants, permanent	7
Food additives	6
Seeds and seedlings	5
Permanent crops, other	4.8
Tea/mate, etc.	1
Oilseeds	1
Other products	0.02
Total	44'472

Source: GATS/USDA and TRACES/European Commission

Annex II: Data Providers and Data Sources; About the FiBL survey

Data providers and data sources

In this section, we provide the data sources for our survey on organic worldwide. If not otherwise stated, the data is from 2023. Several sources appear a number of times; here the full information for these sources:

- European Commission (2024): EU imports of organic agri-food products. Key developments in 2023. Analytical Brief No.4. European Commission, DG Agriculture and Rural Development, Brussels. July 2024. Available at: https://agriculture.ec.europa.eu/document/download/3f8a9f29-8093-4d67-9a26-0655ef1f1cbb_en?filename=analytical-brief-4-eu-organic-imports_en.pdf.
- The full data set as well previous editions of this brief are available on the European Commission's webpage on agricultural markets in the organic sector at https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector_en
- Eurostat: Area, crop and livestock production, operators EU and EU candidate countries, <https://ec.europa.eu/eurostat/web/agriculture/data/database>
- GATS/USDA for US export and import data: USDA Foreign Agricultural Service's Global Agricultural Trade System, available at <https://apps.fas.usda.gov/GATS/>

Afghanistan

Source

- › Certifier data
- › Exports (MT): GATS/USDA

Albania

Source

- › Area, operators: Mediterranean Organic Agriculture Network (MOAN), Istituto Agronomico Mediterraneo di Bari (CHEAM Bari), Bari, Italy
- › Exports (MT) to the EU: European Commission/Traces; Exports (MT) to the US: GATS/USDA

Algeria

Source

- › Area and operators: Ecocert East Africa
- › Exports (MT) to the EU and US: European Commission/Traces and GATS/USDA

Andorra

Source

- › Ecocert Iberica, Seville, Spain

Angola

- Exports (MT): European Commission/Traces

Argentina

Source

- › Area, operator, production, export, retail sales (MT) data: provided by SENASA, Buenos Aires, Argentina, www.senasa.gov.ar
- › Exports (MT) to EU and USA: European Commission/Traces, and GATS/USDA

Contact

Diego Pinasco, SENASA, Buenos Aires, Argentina, www.senasa.gob.ar

Armenia

Source

- › Area, operators: Survey of Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am
- › Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Contact

Eliza Petrosyan and Nune Darbinyan, Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am

Australia

Source

- › Area, operators (data 2022): Australian Organic (2023): Market Report 2023. Australian Organic, Nundah
- › Land use and crop data (from 2016): Source: Australian Bureau of Statistics ABS, provided by Els Wynen, Canberra. See Wynen, Els (2019): Organic Australia in 2010/11 and 2015/16. The World of Organic Agriculture. Research Institute of Organic Agriculture FiBL, Frick, and IFOAM – Organics International, Bonn).
- › Retail sales: Australian Organic, Nundah, Australia

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Note

›See also the article about organic farming in Australia in this and in previous editions of “The World of Organic Agriculture.”

Contact

›Kane Frampton and Josefine Pettersson, Australian Organic, Nundah, Australia

Austria

Sources

›Area, land use and operators: Bundesministerium für Land- und Forstwirtschaft, Regionen und Wasserwirtschaft, Vienna, Austria and Eurostat database, Eurostat, Luxembourg

›Retail sales: RollAMA based on GfK, AMA-Marketing, Agrarmarkt Austria Marketing GesmbH, Vienna, Austria. Brief explanation on RollAMA: The RollAMA (rolling agricultural market analysis) by AMA-Marketing is conducted in collaboration with Consumer Panel Austria GfK and KeyQUEST market research. It is a household panel in which 2,800 Austrian households record their food purchases. The data collected includes meat and poultry, sausages, milk and dairy products, cheese, fruits, vegetables, eggs, potatoes, frozen products, ready-made meals, bread, pastries, and fine baked goods. The purchase quantities and expenditures of these representatively selected households are extrapolated to the total number of Austrian private households, from which various key figures are calculated. The data thus provides information about purchases made for the household. Individual purchases and out-of-home consumption are not included.

›Import data (MT): European Commission/Traces;

›Export data (MT) to US: GATS/USDA

Contact

›Petra Schneider and Barbara Köcher-Schulz, AMA-Marketing GesmbH AMA, Vienna, Austria

›Gabriele Pavlis-Fronaschitz, Bundesministerium für Land- und Forstwirtschaft, Regionen und Wasserwirtschaft, Vienna, Austria

Azerbaijan

Source

›Area, operators Bioinspecta, CERES, and Control Union. Please note that the data source has changed and a direct-year-to-year comparison is not possible.

›Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Bahamas

›Certifier data. The data is from 202, updates were not received.

Bahrain

›Certifier data

Bangladesh

Source

›Certifier data; please note that due to the multiple and changing data sources, a direct year-to-year comparison is not possible for Bangladesh. Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Contact

›Dr. Shaikh Tanveer Hossain, IFOAM Asia

›Dr Khurshid Alam, BARI, Bangladesh

Belarus

Source

›Area, operators: Ecoidea project, Minsk, Belarus.

›Exports (MT) to EU: European Commission/Traces

Contact

›Tatsiana Ostrouh. Ecoidea project, Minsk, Belarus

Belgium

Sources

›Area and livestock data (2022, total area 2023): Eurostat database, Eurostat, Luxembourg, and Biowallonie, Brussels, Belgium

›Retail sales share of total: Biowallonie, Brussels, Belgium

›Import data: European Commission/Traces

Belize

Source

›Area and producers: Certifier data from

2021 Exports (MT) to EU: European Commission/Traces

Benin

Sources

›Area, operators: Certifier data BCS, CERES, Certisys, Control Union, Ecocert West Africa, OneCert. Updates were not received from all certifiers.

›Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Bermuda

›No data were received for Bermuda

Bhutan

Source

›Area, operators: National Center for Organic Agriculture (NCOA) Thimphu, Bhutan, www.moa.gov.bt

Contact

›Kencho Namgyel, National Centre for Organic Agriculture, Thimphu, Bhutan

Bolivia**Source**

›Area, operator, production, operators (2022) from SENASAG, provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Bosnia Herzegovina**Source**

›Area, producers: Ministry of Agriculture, Water Management and Forestry, Sarajevo, Bosnia and Herzegovina. The data is from 2021

- › Crop details are from 2019 and were provided by the Mediterranean Organic Agriculture Network (MOAN, Bari, Italy)
- › Exports (MT) to EU: European Commission/Traces

Contact

- › Elda Hodžić-Isović, Ministry of Agriculture, Water Management and Forestry, Sarajevo, Bosnia and Herzegovina

Brazil**Sources**

›Area and operator data: Ministério da Agricultura, Pecuária e Abastecimento/Ministry of Agriculture, Livestock and Food (MAPA). Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina, which includes PGS data (certified by the Ministry of Agriculture). Historical data were revised.

›Retail sales data is from 2016 and from Organics Brasil

›Exports (MT) to EU and USA: European Commission/Traces and GATS/USDA

›Total export value and retail sales data: Organic Brazil (2016 data)

Note

›Please note that MAPA does not provide crop data. While FiBL had previously integrated some crop data from certifiers, this was not done for the 2023 data, as it is unclear whether this data overlaps with the MAPA data. This uncertainty arises because MAPA does not register international certifiers, which may result in double certification. It is important to note that one certifier reported grazing/grassland areas totalling 700,000 hectares.

›Area and operator data from MAPA includes PGS data.

Contact

›Virgínia Mendes Cipriano Lira, Ministério da Agricultura, Pecuária e Abastecimento (DTEC/SDA/MAPA), Coordenadora de Produção Orgânica, Brasília, Brazil

British Virgin Island**Source**

›Area, operators: Certifier data from 2020. Updates were not received.

Brunei Darussalam

›Certifier data, Updates were not received.

Bulgaria**Sources**

›Land area, operators: Area and operators: Eurostat database organic farming, Eurostat, Luxembourg

› Number of beehives: Ministry of Agriculture, Sofia, Bulgaria, provided by Bioselena, Karlovo, Bulgaria

›Wild collection: Bioselena, Karlovo, Bulgaria

›Retail sales (from 2022): FAS (2023): Organic Market Annual Report Bulgaria. FAS/GAIN, USDA, Washington. Available at

<https://fas.usda.gov/data/bulgaria-organic-market-annual-0>

›Import data [MT]: European Commission/Traces

›Exports [MT] to US: GATS/USDA

Contact

›Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Burkina Faso**Sources**

›Area, operators: Certifier data from BioInspecta, Certisys, Control Union. Ecocert West Africa. Not all certifiers provided updated data.

›Exports (MT) to EU; European Commission/Traces

Burundi**Source**

›Area/operators: Certifier data.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Cambodia**Source**

›Area/operators: Certifier data from CERES, Control Union, Ecocert India, MAYACERT, OneCert. Not all certifiers provided updated data.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Cameroon**Source**

›Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com

›Ecocert East Africa, Antananarivo, Madagascar

›Exports (MT) to EU and US: European Commission/Traces and GATS/USDA

Canada**Source**

› Land area, producers and other operator types, retail sales, market data: Canada Organic Trade Association (COTA), Ottawa, Canada
› Exports (MT) to EU and US: European Commission/Traces and GATS/USDA

Contact

Tia Loftsgard and Zahraa Al Haj Hasan, Canada Organic Trade Association, Ottawa, Canada, <http://ota.com/otacanada.html>

Note

See also the article about organic farming in Canada in this and in previous editions of “The World of Organic Agriculture.”

Cape Verde

No data

Cayman Islands

› Certifier data; no updates were received.

Chad

› Area (wild collection, 2021 data): Certifier data.
› Exports (MT) to EU: European Commission/Traces

Channel Islands**Source**

› Area: FAOSTAT (data 2021). The FAOSTAT website, FAOSTAT, Rome, Italy, <https://www.fao.org/faostat/en/#data> FAOSTAT > Land, Inputs and Sustainability

Chile**Source**

› Area data, producers/ smallholders, livestock and export/import data: Servicio Agrícola y Ganadero (SAG), Santiago, Chile, www.sag.gob.cl, provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

› María José Pizarro Álvarez, Oficina de Estudios y Políticas Agrarias (ODEPA), Ministerio de Agricultura, Santiago, Chile, www.odepa.gob.cl
› Claudio Cárdenas Catalán, Servicio Agrícola y Ganadero (SAG), Ministerio de Agricultura, Santiago, Chile, <http://www.sag.cl>

China**Sources**

› Land area, operators, market/retail sales and export data: Chinese Agricultural University, Beijing, China
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Yuhui Qiao, Chinese Agricultural University, Beijing, China

Colombia**Source**

› Area data: Please note that we changed the data sources and compiled the data from three international certifiers: Ceres, Control Union and Imocert. A direct year-to-year comparison is therefore not possible.
› Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Comoros**Source**

› Area and operators: Ecocert East Africa, Antananarivo, Madagascar
› Exports (MT) to EU: European Commission/Traces

Congo, Republic of

- › Area and producers: Certifier data.
- › Exports (MT) to USA: GATS/USDA

Congo, Democratic Republic of

- › Area and producers: Certifier data.
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Cook Islands**Source**

› Area and producers: Certifier data.

Costa Rica**Source**

› Area and operator data: Servicio Fitosanitario del Estado (SFE), M.A.G. Costa Rica, San José. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Exports (MT) to EU and USA: European Commission/Traces, USDA
› Contact: Karla Morales, Servicio Fitosanitario del Estado (SFE), San José, Costa Rica

Côte d'Ivoire**Sources**

The data were compiled by FiBL based on the data of the following international certifiers: CERTISY, Control Union,
› Ecocert West Africa. Not all certifiers provided updated data for 2023.
Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Croatia**Sources**

› Area and operators: Eurostat database organic farming, Eurostat, Luxembourg

- ›Market (from 2014) & export value data (from 2011): Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia
- ›Import data (MT): European Commission/Traces
- ›Exports to the US (MT): GATS/USDA

Cuba

- ›Area and operators: Certifier data. Not all certifiers provided updates for 2023.
- ›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Cyprus**Source**

- ›Land area and producer data: Eurostat database, Eurostat, Luxembourg
- ›Import data (MT): European Commission/Traces
- ›Exports (MT) to the USA: GATS/USDA

Czechia**Source**

- ›Area, operators, market and international trade data: Institute of Agricultural Economics and Information (UZEI), Department of Agri-environmental Policy, 602 00 Brno, Czech Republic. The retail sales data is from 2021.

- › Import data (MT): European Commission/Traces

Contact

- ›Hana Šejnohová and Jana Hlaváčková, Institute of Agricultural Economics and Information (UZEI), Department of Agri-environmental Policy, Brno, Czech Republic
- ›Andrea Hrabalová, Brno, Czech Republic

Denmark**Sources**

- ›Land area, land use (2022), operators (2022): Eurostat database, Eurostat, Luxembourg. Total farmland 2023: Statistics Denmark
- ›Retail sales: Landbrug & Fødevarer. Based on data from Statistics Denmark (general retail sales) and Organic Denmark (for other marketing channels)
- ›Foodservice, import and export value (euros): Statistics Denmark
- ›Import data (MT): European Commission/Traces

Contact

- ›Ejvind Pedersen, Danish Agriculture & Food Council, Copenhagen, Denmark

Djibouti

- ›No data was reported.

Dominica**Source**

- ›Area and operators: Certifier data (from 2021)
- ›Exports (MT) to EU: European Commission/Traces

Dominican Republic**Source**

- ›Area, operators, and production data: from Secretaria de Estado de Agricultura, Oficina de Control Orgánico, Santa Domingo, Dominican Republic, www.agricultura.gob.do. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

- ›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

- ›Miguel Ángel Cepeda Jiménez and Yatrna De León Rosario Ministerio de Agricultura, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Ecuador**Source**

- ›Area, operators, production, and export data (total in MT and euros): Agrocalidad, Quito, Ecuador, www.agrocalidad.gob.ec Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

- ›Rommel Aníbal Betancourt Herrera, Agrocalidad, Quito, Ecuador

Egypt**Source**

- ›Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
- ›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

El Salvador**Source**

- ›Area, operators, production, export, retail sales data from the Ministerio de Agricultura y Ganadería (MAG), Santa Tecla, El Salvador
- ›Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

- ›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

- ›Jose Fernando Maldonado Cestona, Ministerio de Agricultura y Ganadería - Dirección General de Sanidad Vegetal (MAG-DGSV), San Salvador, El Salvador

Equatorial Guinea

- ›Operators: Certifier data from 2020. Updates were not received.

Estonia**Sources**

- › Land area, land use, operators: Eurostat database, Eurostat, Luxembourg
- › Wild collection: Estonian Organic Farming Foundation (2024): Organic Farming in Estonia 2023. Tartu. Available at <https://www.maheklubi.ee/mison/eestis/>.
- Regrettably, it was not possible to integrate the wild collection area into the database. This area totalled 85,649 hectares in 2023.
- › Retail sales data: Estonian Institute of Economic Research, Estonia
- › Export data (euros): Estonian Ministry of Agriculture
- › Exports (MT) to the USA: USDA
- › Imports (MT): European Commission/Traces
- › Detailed reports about organic farming in Estonia can be found at <http://www.maheklubi.ee/mison/eestis/>

Contact

- › Merit Mikk, Centre of Ecological Engineering, Tartu, Estonia

Eswatini

- › Area and operators: Certifier data: BCS, Control Union, Ecocert South Africa, all of who provided updated data.

Ethiopia**Sources**

- Area and operator data
- › CERES, Frick, Switzerland
- › Control Union, Zwolle, The Netherlands
- › Ecocert South Africa, Stellenbosch, South Africa
- › Onecert, Mansarovar, Jaipur, India, www.onecert.com
- › Textile Exchange, London, UK (for Cotton data)
- Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Falkland Islands/Malvinas**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. (2021 data)

Contact

- › Gunnar Gunnarsson, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is

Fiji Islands**Source**

- › Area and operator data: Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji, www.spc.int
- › Exports (MT) to EU: European Commission/Traces

Finland**Sources**

- › Land area and operators: Finnish Food Authority, data provided by Pro Luomu, Helsinki, Finland
- › Retail sales and export data: Pro Luomu, Helsinki, Finland
- › Import data: European Commission/Traces

Contact

- › Heidi Haavisto-Meier and Aura Lamminparras, Pro Luomu, Helsinki, Finland

France**Source**

- › Area and operators: Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org. Crop details: Eurostat database, Eurostat Luxembourg
- › Retail sales, export and import values: Agence Bio, Montreuil-sur-Bois, France
- › Import data (MT): European Commission/Traces
- › Exports to US (MT): GATS/USDA

French Guyana**Source**

- › Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org.

French Polynesia**Source**

- › Area and operators: Certifier data: BCS, Bioagricert, Ecocert East Africa.
- › Exports (MT) to EU: European Commission/Traces

Gambia

- › The certifier, who had provided data in the previous years, did not report activities anymore. No imports from Gambia into the European Union or the United States were reported.

Georgia**Source**

- › Area and operators: Elkana and certifier data
- Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

- › Elene Shatberashvili and Mariam Jorjadze, Biological Farming Association Elkana, Tbilisi, Georgia, www.elkana.org.ge

Germany**Sources**

- › Area and operator data: Federal Agency for Agriculture BLE, Bonn, Germany, provided by

Agrarmarkt Informations-Gesellschaft mbH (AMI), Bonn, Germany, www.ami-informiert.de
 ›Crop and livestock details: Agrarmarkt Informations-Gesellschaft mbH (AMI), Bonn, Germany, www.ami-informiert.de.
 ›Retail sales: Arbeitskreis Biomarkt (Working group organic market), coordinated by AMI based on data of GfK, Nielsen, bioVista und Klaus Braun Kommunikationsberatung
 ›Import data (MT): European Commission/Traces
 ›Exports to the US (MT): GATS/USDA

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: CERES-CERT, CERTISYS, Control Union, Ecocert, East Africa, and Letis.

. With the exception of one certifier, all provided data for 2023. Exports (MT) to EU and US: European Commission/Traces and GATS/USDA

Greece**Sources**

›Land area and operators: Ministry of Agriculture, Athens, Greece (2022 data)
 ›Market data (2023): Provided by Agrobio based on estimates
 ›Import data (MT): European Commission/Traces
 ›Exports to US (MT): GATS/USDA

Contact

›Nicolette van der Smissen, Agrobio, Feres, Greece

Grenada

›Area and operators: Certifier data.
 ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Guadeloupe**Source**

›Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org.

Guatemala**Source**

›Area, operators, and total export data: Department of Organic Agriculture, Ministerio de Agricultura, Ciudad de Guatemala, Guatemala www2.maga.gob.gt. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
 ›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

›Lauro Antonio Rivera Gramajo, Ministerio Agricultura, Ganadería y Alimentación (MAGA), Ciudad de Guatemala, Guatemala, <https://visar.maga.gob.gt/>

Guinea

›Operators: Certifier data. Only data on processors. The data is from 2020.
 ›Exports (MT) to EU: European Commission/Traces,

Guinea Bissau

›No area or operator data were provided.
 ›Exports (MT) to EU: European Commission/Traces

Guyana**Source**

›Area: Wild collection (2019): Certifier data. No updates were provided.
 ›Exports (MT) to EU: European Commission/Traces

Haiti**Sources**

›Area and operators: Certifier data
 ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Honduras**Source**

›Area and operators: (2020): SENASA Honduras, SAG, Tegucigalpa, Honduras; crop details based on data from certifiers.

›Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

›Contact: Sandra Isabel Elvir Sánchez, Secretaria de Agricultura y Ganadería SENASA, Tegucigalpa, Honduras

Hong Kong

›Certifier data (processing only)
 ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Hungary**Sources**

›Land area and operator data: Eurostat database, Eurostat, Luxembourg. Crop details from 2022 including FiBL calculation for the organic area by crop (including both fully converted and in conversion area).

›Total organic farmland and producers are for 2023 from the Hungarian Statistical Office, www.ksh.hu.

›Market and trade data (2009/2015): Survey/Estimate by Ferenc Frühwald, Budapest, Hungary

›Import data (MT): European Commission/Traces
 ›Exports to the US (MT): GATS/USDA

Contact

›Dora Drexler, Hungarian Institute of Organic Agriculture ÖMKI, Budapest, Hungary, www.biokutatas.hu

Iceland**Source**

›Vottunarfstofan Tún ehf, Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is. (2021 data)

Contact

›Gunnar Gunnarsson and Ragnar Þórðarson, Vottunarfstofan Tún ehf

India**Source**

›Land area, operators, and exports: Agricultural and Processed Food Products Export Development (APEDA) Ministry of Commerce & Industry, Government of India, New Delhi, India, www.apeda.com. Crop area data were not available from APEDEA; area data for cotton were added from the Textile Exchange (2021 data). For some key crops (soybeans, rice), the potential crop land was calculated by FiBL, using the EU and US organic import volumes as a basis (European Commission/TRACES and USDA/GATS). These calculations are based on 2022 data.

›Retail sales data : Agricultural and Processed Food Products Export Development (APEDA) Ministry of Commerce & Industry, Government of India, New Delhi, India, www.apeda.com

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Note

In addition to the 3rd party certified area, there were 1'196'403 hectares with PGS certification managed by a total of 1'933'641 farmers organised in 64509 PGS groups. See chapter by de Jorge in this volume.

Indonesia**Source**

›Area data were compiled from several international certifiers not all of who provided updated data: ACT, Bioinspecta, Bioagricert, CERES, Control Union, Ecocert India, NCO, OneCert, and QCS.

›For the producers, the data from the Indonesian Organic Alliance were maintained (from 2017). Further clarification is needed for Indonesia.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Iran**Sources**

›Area and operators: Certifier data from Bio Inspecta, CERES, MAYACERT (2021 data).

›Beehives: Shahid Beheshti University ESRI, Evin, Tehran, Iran (2017).

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Note

Please note that the data source changed in 2020. The data has been compiled by FiBL since 2021; based on the data from international certifiers. Previously data were provided by the Shahid Beheshti University ESRI, Evin, Tehran, Iran (last update: 2017).

Iraq**Source**

›Zakho Small Villages Projects (ZSVP), Dohuk City, Dohuk, Iraq. The data is from 2019.

Contact

›Dr Abid Ali Hasan, Zakho Small Villages Projects (ZSVP), Program Coordinator in Iraq, Dohuk City, Dohuk, Iraq

Ireland**Sources**

›Area and Operators: Eurostat, Luxembourg

›Retail sales: Bord Bia, Dublin, Ireland

›Import data (MT): European Commission/Traces
› Exports (MT) to USA: GATS/USDA

Israel**Source**

›Area and operators: Standardisation and Accreditation Department Ministry of Agriculture and Rural Development Plant Protection and Inspection Services (PPIS), Israel. The data is from 2022.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

›Shelly Elisian, Standardization and Accreditation Department, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Italy**Sources**

›Organic area and operators, retail sales: SINAB (2024): Eurostat database, Eurostat, Luxembourg

›Catering sales: Nomisma, Bologna, Italy (2021 data)

›Import data (MT): European Commission/Traces

›Exports to the US (MT): GATS/USDA

Contact

›Prof. Dr. Raffaele Zanolì, Università Politecnica delle Marche UNIVPM, Ancona, Italy

Jamaica**Source**

›Certifier data

›Exports (MT) to the USA: GATS/USDA

Japan**Source**

›Area and producer (2023) data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan

›Domestic market data (2022): Estimate of the Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan: Please note that the data include catering sales.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

›Prof. Dr. Yoko Taniguchi. Associate Professor, Setsunan University, Japan

›Miyoshi Satoko, Executive member, Organic Congress Japan

›See also chapter about organic in Asia in this volume.

Jordan**Source**

›Area and operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Kazakhstan**Sources**

›Area and operator data were received from several control bodies, not all of who provided updated data for 2023: CERES, Ecoglobe, Ekoagros, LETIS, Organic Standard, and STC.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Note

The area data is probably not complete as not all certifiers that are active in the country provide data.

Kenya**Source**

›Area and operators: Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

›Samuel Ndungu, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke

Korea, Republic of**Source**

›Area, operators and retail sales: National Agricultural Products Quality Management Service, National Statistical Office, Korea Rural Economic Institute, Korea

›Exports (MT) to EU and USA: European Commission/Traces, USDA

›Retail sales (2022): National Agricultural Products Quality Management Service, National Statistical Office, Korea Rural Economic Institute, Korea

Contact

›Hakkyun Jeong, Korea Institute of Rural Social Affairs, Chungnam Province, Republic of Korea

Kosovo**Source**

›Area and operators: Certifier data and Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

›Wild collection: Certifier data. Please note that this data might include double counting, as wild harvest products were counted separately.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Kuwait**Source**

›Certifier data

Kyrgyzstan**Source**

›Area and operators: Data was provided by several certifiers: ACSC, Bioinspecta, Control Union, and LETIS.

›Exports (MT) to EU: European Commission/Traces

Lao People's Democratic Republic**Source**

›Area and operator data was provided by: ACT, Organic Agriculture Certification Thailand,

›Bioagricert,

›CERES-Cert,

›Control Union, Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

›Onecert, Jaipur, Rajasthan.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Latvia**Source**

›Area and Operators (2021): Eurostat database, Eurostat, Luxembourg

›Market data (from 2017): Retail sales and export data: Moreorganic Sourcing AB (2018): Baltic Organic Market Report 2018/2019. Moreorganic Sourcing, Uppsala, Sweden

›Retail sales: The data was provided by More Organic and is from 2017.

›Import data (MT): European Commission/Traces

Lebanon**Source**

›Area and operators: CCPB Middle East, Beirut, Lebanon

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

›Angel Atallah, CCPB Middle East, Beirut, Lebanon

Lesotho

›Area and producers: Certifier data.

›Exports (MT) to EU: European Commission/Traces

Liberia

›Area/Operators: Certifier data

›Exports (MT) to EU: European Commission/Traces

Liechtenstein

Source

›Klaus Büchel Anstalt, Institute of Agriculture and Environment, Mauren, Liechtenstein, www.kba.li.

Contact

›Florian Bernardi and Klaus Büchel, Institute of Agriculture and Environment, Mauren, Liechtenstein, www.kba.li.

Lithuania

Source

›Land area, production, operators: Ekoagros, Kaunas, Lithuania

›Market data: Retail sales and export data (2017): Moreganic Sourcing AB (2018): Baltic Organic Market Report 2018/2019. Moreganic Sourcing, Uppsala, Sweden

›Import data (MT): European Commission/Traces

›Export to the US: GATS/USDA

Contact

›Virginija Luksiene, Ekoagros, Kaunas, Lithuania

Luxembourg

Source

›Land area and operator data: Administration des Services Techniques de l'Agriculture, Service de la protection des végétaux, Luxembourg, www.asta.etat.lu and Eurostat database, and Eurostat, Luxembourg

›Market data: Oekopolis. Organic shares of total retail sales were calculated by FiBL using Eurostat retail sales data

›Import data (MT): European Commission/Traces

Contact

›Claudine Schmit, Ministère de l'Agriculture, de la Viticulture et de la Protection des consommateurs, Luxembourg, www.asta.etat.lu

Madagascar

›Area and producers: Certifier data.

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Malawi

›Certifier data

Malaysia

›Area and operators: Certifier data from ACO, Control Union and NCO

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Maldives

›Area and operator data were not received.

›Exports (MT) to EU: European Commission/Traces

Mali

›Area and operators: Certifier data. Not all certifiers provided updates.

›Exports (MT) to EU: European Commission/Traces

Malta

Source

›Area, operators, livestock, production (2022 data): Mediterranean Organic Agriculture Network, Bari, Italy and Eurostat database, Eurostat, Luxembourg

›Import data (MT): European Commission/Traces

Martinique (France)

Source

›Agence Bio, Montreuil-sur-Bois, France, www.agencebio.org

Mauritius

Source

›Area, and producers: Ecocert offices in Africa.

www.ecocert.com: Not for all indicators, updates were received.

›Exports (MT) to EU: European Commission/Traces

Contact

›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Mayotte (France)

Source

›Agence Bio, Montreuil-sur-Bois, France, www.agencebio.org

Mexico

Source

›Area and operators: Subdirectora de Autorización y Aprobación de Organismos de Coadyuvancia, Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria (SENASICA), Secretaría de Agricultura y Desarrollo Rural (SADER), Ciudad de México, México. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

›Aurora Josefina Lobato García, Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria (SENASICA), Secretaría de Agricultura y Desarrollo Rural (SADER), Ciudad de México, México

Moldova**Source**

›Area and operators: Ministry of Agriculture and Food Industry, Chişinău, Moldova
›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

›Marina Iluşca Head of the Department for Organic Production and Products of Origin, Ministry of Agriculture and Food Industry of the Republic of Moldova, Chişinău, Moldova

Monaco

Certifier data

Mongolia

› Certifier data

Montenegro**Source**

›Area and operators: Ministry of Agriculture and Rural Development, Podgorica, Montenegro and Eurostat, Luxembourg
›Exports (MT) to EU: European Commission/Traces

Contact

› Milica Bučković, Ministry of Agriculture, Forestry and Water Management, Podgorica, Montenegro

Morocco**Sources**

›Area and operators (2020): Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Mozambique**Sources**

›Area and operators: Certifier data: from BCS, CERES, Control Union and OneCert. Exports (MT) to EU: European Commission/Traces

Myanmar

›Area and operators: Certifier data.
›Exports (MT) to EU : European Commission/Traces

Namibia

›Area and operators: Certifier data. CERES, Ecocert India, NCO, OneCert
›Exports (MT) to EU: European Commission/Traces

Nepal

›Area and operators: Certifier data were compiled based on the data of 4 international certifiers: CERES, Ecocert India, NCO, OneCert
›Exports (MT) to EU and USA: European Commission/Traces, USDA

Netherlands**Sources**

›Land area and operator data (2022): Eurostat database, Eurostat, Luxembourg. Total area 2023: from Bionext.
›Retail sales and export data: Bionext, Ede, The Netherlands; the Bionext website, <https://bionext.nl/>.
›Import data (MT): European Commission/Traces
›Exports to the US (MT): GATS/USDA

Contact

›Marian Blom, Bionext, Ede, The Netherlands, www.bionext.nl

New Caledonia**Source**

›Certifier data
›Exports (MT) to EU: European Commission/Traces

New Zealand**Source**

›Area, operators, retail sales, exports (2020): Organics Aotearoa New Zealand, Wellington, New Zealand, www.oanz.org.nz, provided by Agribusiness group.
›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Jon Manhire, the AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com

Nicaragua**Source**

›Area and operators: Instituto de Protección y Sanidad Agropecuaria (IPSA), Departamento de Inspección Certificación Fitosanitaria, Managua, Nicaragua, www.magfor.gob.ni Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina (2022 data)
›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Ing. Ramón Ernesto Noguera García, Instituto de Protección y Sanidad Agropecuaria IPSA, Departamento de Inspección Certificación Fitosanitaria, Managua, Nicaragua, www.magfor.gob.ni

Niger

›Certifier data
›Exports (MT) to EU: European Commission/Traces

Nigeria**Source**

›Area and operators: Certifier data from CERES, Control Union, Ecocert Southern Africa, OneCert

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Note

Producers: Please note that the certifiers did not provide the total number of producers; in most cases, only the number of companies/projects/certificates were provided. The number of producers must therefore be considerably higher.

Contact

Olugbenga O. AdeOluwa, University of Ibadan, Nigeria

Niue

Source

›No data available; no updates were received

North Macedonia

Source

›Land area and operator data: Ministry of Agriculture, Forestry and Water Management, Skopje, North Macedonia and Eurostat database, Eurostat, Luxembourg

›Wild collection: Certifier data

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

›Olivera Bicikliski, Ministry of Agriculture, Forestry and Water Management, Skopje, North Macedonia

Norway

Sources

›Land area, livestock: Norwegian Agriculture Agency (Landbruksdirektoratet), Oslo, Norway

›Operators) Eurostat database, Eurostat, Luxembourg

›Market data: Total retail sales data were compiled by FiBL based on data from the Norwegian Agriculture Agency

Contact

Mikael Meland Leksen, Norwegian Agriculture Agency (Landbruksdirektoratet), Oslo, Norway

Oman

Source

›Area and operators: Certifier data

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Pakistan

›Area and producers: Certifier data. For the number of the producers, data from the Textile Exchange were added.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Palestine, State of

›Area for agricultural land, production, beehives, total wild collection area: Mediterranean Organic

Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari

(CIHEAM Bari), Bari, Italy

›Exports (MT) to EU : European Commission

Panamá

Source

›Area and operators: Ministerio de Desarrollo Agropecuario, Dirección Nacional de Sanidad Vegetal, Panama, www.mida.gob.pa.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Fermín Vicente Romero Houlstan, Dirección Nacional de Sanidad Vegetal; Ministerio de Desarrollo Agropecuario (MIDA), Panamá, República de Panamá

Papua New Guinea

Source

›Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. Exports (MT) to EU and USA: European Commission/Traces, USDA

Paraguay

Source

›Area and operators: Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas (SENAVE), Department of Organic Agriculture, Asuncion, Paraguay, www.senave.gov.py Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

›Exports (MT) to EU and USA: European Commission/Traces, USDA

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. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Patricia Kristel Alvarez Ordoñez and Pedro Molina, Dirección General Agrícola (DGA – MINAGRI). Secretaria Técnica del Consejo Nacional de Productos Orgánicos (CONAPO)

Philippines**Sources**

Area and operators: The data were coiled by FiBL from a number of certifiers, but there are more certifiers active than those listed below. Certifiers who provided updated data: BCS, Bioagricert, CCPB, CERES, Control Union, Ecocert India, Exports (MT) to EU and USA: European Commission/Traces, USDA

Poland**Source**

›Land area and producers: Główny Inspektorat Jakości Handlowej Artykułów Rolno-Spożywczych. Area details (only for fully converted) from Eurostat, Eurostat database, Eurostat, Luxembourg (2021 data)
›Retail sales: Biokurier, Bydgoszcz, from 2022. The data is based on wholesale turnover and therefore not directly comparable with the retail sales data from other countries.
›Import data (MT): European Commission/Traces
›Exports to the US (MT): GATS/USDA

Portugal**Source**

›Organic land and operators: Eurostat database, Luxembourg; Area details (only for fully converted) from: Eurostat
›Market data (2011): INTERBIO, <http://www.interbio.pt>
›Import data (MT): European Commission/Traces
›Exports to the US (MT): GATS/USDA

Puerto Rico

Certifier data

Réunion**Source**

›Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org

Romania**Sources**

›Organic area, land use, livestock and production: Eurostat database, Luxemburg.(2022), total organic farmland 2023 from MADR Romania
›Retail sales data: Dobrescu, Monica (2017): Romania: Organic production and market overview. GAIN Report No. RO 1702. The USDA FAS website. USDA, Washington. The data is from 2016.
›Import data (MT): European Commission/Traces
›Exports to the US (MT): GATS/USDA

Russian Federation**Source**

›The area data was compiled by FiBL based on the data of the following international certifiers: CERES-CERT, Ecoglobe, and LETIS (2022 data)

›Market data (retail sales): Prusso, Giuseppe (2019): Il Mercato die Prodotti Bio nella Federazione Russa. Presentation by Prusso, Giuseppe of the Italian Trade Agency at Sana, Bologna, September 6, 2019
›Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Rwanda

›Area and operators: Certifier data.
›Exports (MT) to EU and USA: European Commission/Traces, USDA

Saint Lucia

Certifier data

Saint Pierre and Miquelon

›Area and operator data were not received.

Samoa**Source**

›Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.
›Exports (MT) to EU: European Commission/Traces

Sao Tome and Prince**Source**

›Area and operators: Certifier data
›Exports (MT) to EU: European Commission/Traces

Saudi Arabia**Source**

›Area and operators: Department of Organic Agriculture (DOA), <http://moa.gov.sa/organice/portale>
›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Raed Saleh Almusaylim; Manager of Control & Legislation Section, Department of Organic Production, Riyadh, Saudi Arabia

Senegal**Sources**

›Area and operators: based on the data from the following certifiers: BCS, CERES, Certisys, and Ecocert West Africa. Not all certifiers provided data updates.

›Exports (MT) to EU: European Commission/Traces

Note

›No updated data on producers was received from the National Federation for Organic Agriculture, Thiès, Sénégal, and as a result, their data has been removed from the database, including the number of producers, including smallholders, originally provided in 2013. It is important to note that the certifiers whose data we used often do not provide information on the number of farmers or smallholder farmers; instead, they typically report

only the number of companies, projects, or certificates.

Serbia

Source

- ›Area and operators: Ministry of Agriculture, Forestry and Water Management, Belgrade, Republic of Serbia
- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Jelena Milic, Ministry of Agriculture, Forestry and Water Management, Belgrade, Republic of Serbia

Seychelles

- ›Area and operators: Certifier data
- ›Exports (MT) to EU: European Commission/Traces

Sierra Leone

- ›Area and operators: Certifier data. Not all certifiers provided updated data
 - ›Exports (MT) to EU and USA: European Commission/Traces, USDA
- Please note that one certifier combined the area for cocoa and coffee; FiBL made an estimate of how much of this area was for coffee and how much for cocoa.

Singapore

- ›Area and operators: Certifier data.
- ›Exports (MT) to EU: European Commission/Traces

Slovakia

Source:

- ›Area, operators, livestock, and crop production: Central Control and Testing Institute in Agriculture (ÚKSÚP), Ministry of Agriculture of the Slovak Republic
- ›Market data (2010): Ecozept, market research and marketing consulting agency. Freising, Germany
- ›Import data (MT): European Commission/Traces

Slovenia

Sources

- ›Area, operators, livestock, crop production : Statistical Office of the Republic of Slovenia
- ›Retail sales (from 2013): Institute for Sustainable Development, Ljubljana, Slovenia
- ›Export and import values (in Euros) are from 2009: Institute for Sustainable Development, Ljubljana, Slovenia
- ›Import data (MT): European Commission/Traces
- ›Exports (MT) to USA: GATS/ USDA

Solomon Islands

Source

- ›Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

- ›Exports (MT) to EU: European Commission/Traces

Somalia

- ›Certifier data.
- ›Exports (MT) to EU: European Commission/Traces

South Africa

Sources

- Area and operators
- ›BCS, CERES-CERT,, Control Union
- ›Ecocert South Africa,
- Exports (MT) to EU and USA: European Commission/Traces, USDA

Spain

Sources

- ›Area and land use, operators: Ministerio de Agricultura, Pesca y Alimentación: Agricultura Ecológica 2024, Madrid, Spain
- ›Retail Sales, provided by Pedro López, Pro-Voc-Association, Madrid, Spain, www.provotec.es
- ›Import data (MT): European Commission/Traces
- ›Exports (MT) to the US: GATS/USDA

Contact

Pedro López, Pro-Voc-Association, Madrid, Spain, www.provotec.es

Sri Lanka

Source

- ›Area and operators: National Organic Control Unit (NOCU), Colombo, Sri Lanka, www.nocu.lk
- ›Exports (MT) to EU and USA: European Commission/Traces, GATS/ USDA

Contact

M. D. Madhumali, Assistant Director, National Organic Control Unit (NOCU), Colombo, Sri Lanka

Sudan (former)

- ›Certifier data
- ›Exports (MT) to EU: European Commission/Traces

Suriname

- ›Area: Certifier data (201)
- ›Exports (MT) to EU: European Commission/Traces

Sweden

Sources

- ›Area, livestock and operators: Eurostat database, Luxembourg
- ›Market data: Ekologiska Lantbrukarna, Ekomatcentrum och Organic Sweden (2024) Ekologiska Årsrapporten 2023. Stockholm.
- ›Import data (MT): European Commission/Traces
- ›Exports (MT) to the US: GATS/USDA

Switzerland

Sources

- ›Land area and crop data, producers: Federal Agency for Statistics (BfS), Neuchatel, Switzerland.

›Processors, importers: Bio Suisse, Basel, Switzerland

›Retail sales: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioin zahlen.php.

Contact

Hans Ramseier, Bio Suisse, Basel, Switzerland

Syria

›Area or operator data were not received.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Taiwan

Source

›Area and operators: Taiwan organic information Portal (2024): Yearly Report of Organic agricultural land and farms in Taiwan. Taiwan.

<https://info.organic.org.tw/5138/>

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Tajikistan

Area and operators: Certifier data.

Tanzania

Sources

›Area data: Bioinspecta, CERES., Control Union. Ecocert Southern Africa

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Note

Please note that a direct year-to-year comparison is not possible for Tanzania due to the changing data sources.

Thailand

Source

›Area, producers, retail sales: Green Net Survey among the international and domestic certifiers; Green Net, Bangkok, Thailand.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Note

Please note that there a major changes compared to the data provided in the previous edition of this year book. This is due to two factors.

›The government's subsidy for the organic rice project has ended, leading to a significant decrease in organic rice areas and grower groups.

› The areas for vegetables, fruits, coffee, and tea have increased due to improved data, as seen in the reduction of "unknown crop" areas.

Contact

Vitoon Panyakul and Sakonwan Kaewsombon, Green Net, 10330 Bangkok, Thailand, www.greennet.or.th.

Timor-Leste

›Area and operators: Certifier data.

›Exports (MT) to the USA: USDA

Togo

Sources

›Area and operators: The data was compiled by FiBL based on the data of the following international certifiers. CERTISYS Control Union, Ecocert, Letis;

›OneCert international, Jaipur, India
Exports (MT) to EU and USA: European Commission/Traces, USDA

Tonga

Source

›Certifier data (from 2019)

Tunisia

Source

›Area and operators : Direction Générale de L'Agriculture Biologique (DGAB), Tunis, Tunisia

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Turkey (Türkiye)

Source

›Area and operators: Ministry of Agriculture and Forestry, Ankara, Turkey, and Eurostat database, Eurostat, Luxembourg

›Market/retail sales data (2014): USDA Foreign Agricultural Services (2016): Turkish Organic Market Overview. USDA, Washington, USA.

›Export and import values (2017): Ministry of Agriculture and Forestry, Ankara, Turkey

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Zeynep Rana Demirkan Ölmez, Republic of Turkey Ministry of Agriculture and Forestry, Ankara, Turkey

Uganda

Sources

›Area and operators: Bonabana et al. (2022): Organic Agriculture Statistics in Uganda. Makerere University, Kampala, Uganda

While the total organic farmland area is from this study, additional crop information from 2 certifiers and from Textile Exchange (2021 data) was added; however, this data is not complete.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Ukraine

Sources

›Area and operator data: Ministry of Agrarian Policy and Food of Ukraine, Kyiv, Ukraine

›Crop data: The data are from the Ministry of Agrarian Policy and Food of Ukraine, which provided data on four major crops (grain maize,

soybeans, sunflower, wheat) for the year 2021. No updates for the crop data were received.

›Domestic market (2023): Organic.Info, Kyiv, Ukraine, <https://organicinfo.ua/en/about-us/> (Data excludes retail sales of imported products)

Infographics

›Infographics with data are available at <https://organicinfo.ua/en/infographics/>

Contact

›Maryna Kyslytska, The Ministry of Agrarian Policy and Food of Ukraine, kyslytskaminagro@gmail.com.

United Arab Emirates

Source

›Area and operators: Ministry of Environment and Water (MOEW), United Arab Emirates. Crop details from certifiers were added.

› Exports (MT) to the USA: USDA

United Kingdom

Sources

›Land use details/crops/operators: DEFRA, London UK

›Market data: Soil Association (2024): Organic Market Report 2023. Soil Association, Bristol.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contacts

Lee Holdstock, Soil Association, Bristol, UK

United States of America

Source

›Land area and producers (2021 data): United States Department of Agriculture, Washington, USA.

›Market/Retail sales data: Organic Trade Association (OTA), Washington D.C., USA

›Export and import data: GATS, USDA, Washington, USA

›Exports (MT) to EU: European Commission/Traces

Uruguay

›Area and operators: Certifier data

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Uzbekistan

›Area and operators: Certifier data and Textile Exchange, <https://textileexchange.org/>

›Exports (MT) to EU: European Commission/Traces

Vanuatu

Source

›Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Venezuela

›Area and operators: Certifier data.

Viet Nam

Sources

›Area and operators: Vietnam Organic Agriculture Association, Hanoi, Vietnam.

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Nguyễn Thị Hồng Ngọc, Vietnam Organic Agriculture Association, Hanoi, Vietnam

Yemen

›Exports (MT) to USA: GATS/ USDA

Zambia

Source

›Area and operators: Certifier data

›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Kyle Albertyn and Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

Zimbabwe

Source

›Area and operators: Ecocert South Africa, Stellenbosch, South Africa

›Exports (MT) to EU: European Commission/Traces

Contact

Kyle Albertyn and Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

About the FiBL Survey

In total, data were provided by more than 200 experts. 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 several countries: ACO Certification, Bioinspecta, CCPB, CERES-CERT, Certisys, Control Union, Ecocert, Mayacert, Ecoglobe, Ekoagros, ICEA, Imocert, Kiwa BCS Oko-Garantie GmbH, LETIS, NASAA Certified Organic (NCO), Organic Agriculture Certification Thailand (ACT), Organización Internacional Agropecuaria (OIA), OneCert and Quality Certification Services (QCS).

Our collaboration with the Inter-American Commission for Organic Agriculture (CIAO) eased data collection in Latin America and the Caribbean substantially. Data from the Mediterranean countries were supplied by the Mediterranean Organic Agriculture Network (MOAN, c/o Mediterranean Agronomic Institute of Bari). Data from the Pacific Islands were provided by the Pacific Organic and Ethical Trade Community (POET.com). Another important source covering many countries is Eurostat. A list of all data sources and contacts is provided in the annex.

Countries covered

Data from 188 countries/territories were available, including area, producers and other operators, production, retail sales, international trade, livestock and further indicators. Updated data was not available for all countries/territories. For the countries/territories for which FiBL compiles the data among (often several) certifiers, not all of them provided updated data in all cases. When no new data was available, data from the previous survey were used.

Indicators covered

Data on the following indicators were collected:

- organic area and production including breakdown by crop;
- livestock numbers; production data (volumes and values);
- producers and further operator types;
- domestic market data (total retail sales and food service sales values and volumes, per capita consumption, share of the total market, and breakdown by product);
- international trade data (total import and export values and volumes, and breakdown by product).

Not all data that was collected is published in this book (e.g., production, livestock numbers, breakdown by product for the 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 collection and analysis process is available in our metadata, which can be found on Organic Eprints <https://orgprints.org/36848/>.

Definitions/Explanations

Area share of total agricultural land: In some cases, the calculation of the organic share of the total agricultural land or that of individual crops, which in most cases is based on

FAOSTAT and in some cases the Eurostat data, might differ from the organic shares obtained from ministries or local experts.

Area: Data represents **certified organic land that is already fully converted as well as land under conversion** because many data sources do not separate or include the latter (for instance, Austria, Germany and Switzerland) and because land under conversion is under organic management. For a definition of organic agriculture, see the IFOAM – Organics International website.¹

Certifiers: In this, like in former editions of the yearbook, we use the term "certifiers" to refer to the organizations responsible for ensuring compliance with organic standards. However, the more accurate term "control bodies" has become widely adopted in recent years to reflect their broader regulatory role. We plan to transition to this terminology in the next edition to align with current practice.

Completeness of data: For some countries, either no current data were available, or the data provided may not be complete. For others, no data were available. It may, therefore, be assumed that the extent of organic agriculture is larger than documented in this publication.

Country definitions: For countries and territories, the FAO country list is used. Where the designation "country" appears in this report, it covers countries or territories. In most cases, countries are grouped by region according to the Standard Country and Area Classifications as defined by the United Nations Statistics Division.

Data revisions: Data revisions and corrections are communicated at statistics.fibl.org.

Direct year-to-year comparison: A direct year-to-year comparison is not possible for all data, as the data sources may change, data may not be provided on an annual basis, data may have been revised or corrected due to improved data access, or exchange rates might change from year to year.

Export/Import data: For exports and import volumes FiBL used its own classification. It is working on the harmonisation with the EU and US classification.

Metadata: Metadata for the FiBL survey on organic agriculture worldwide are available on Organic Eprints at <https://orgprints.org/36848>.

PGS: For some countries, areas certified by Participatory Guarantee Systems (PGS) have been included as the data providers did not make the distinction between third-party and PGS certification.

Producer data: Some countries report the number of smallholders, while others report only the number of companies, projects, or grower groups, which may each comprise several producers. This is especially relevant for numerous African countries. The number of producers is, therefore, probably higher than the number communicated in this report.

Retail sales data: It should be noted that for market and trade data, comparing country statistics remains very problematic due to differing methods of data collection. Furthermore, for market and trade values fluctuating exchange rates must be kept in mind.

Sources: Data was gathered from private sector organizations, governments, and certification bodies. For detailed information on the data sources, please check the annex at the end of this volume (page 333).

¹ The definition of organic agriculture is available at the website of IFOAM – Organics International www.ifoam.bio/en/organic-landmarks/definition-organic-agriculture

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Organic agriculture is practised in almost 190 countries, and nearly 99 million hectares of agricultural land are managed organically by at least 4.3 million farmers.

Global sales of organic food and drink reached more than 136 billion euros in 2023.

The 26th edition of “The World of Organic Agriculture”, published by the Research Institute of Organic Agriculture FiBL and IFOAM – Organics International, offers a comprehensive review of recent developments in global organic agriculture. It presents detailed statistics on organic farming that relate to area under organic management, land use and crops, the number of farms and other operator types, retail sales and international trade data.

The book features contributions from representatives of the organic sector worldwide, addressing topics such as the global market for organic food, organic imports, regulations, and policies. It provides insights into current and emerging trends in organic agriculture across various regions

The latest data is presented annually at BIOFACH in Nuremberg, Germany.

In 2026, BIOFACH will take place from February 10–13.

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